

Time Management for Estimators

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In his book *Seven Habits of Highly Effective People* Steven Covey quotes Albert Einstein: "The significant problems we face cannot be solved at the same level of thinking we were at when we created them."

This is perhaps a valid place to begin a discussion of time management for estimators. No one who has practiced estimating in recent years can fail to recognize the increased time pressures on the estimator.

There are more projects to bid, often less time to bid them, they are increasingly complex, the documents from which bids must be prepared are not complete, and many estimators also wear other management hats for their companies.

It is therefore quite natural to seek ways to manage our time more efficiently and more productively. In seeking to do so, we might be wise to first examine the way we do things now. This examination is not a cursory one, but a detailed step by step list of what we do, followed by why we do it. It may take several days to periodically jot down our different categories of actions, but the time is well spent. If we don't know approximately where we are, we will have difficult time getting anywhere.

Having done this, we can examine our current actions in light of another Covey maxim: "Begin with the end in mind." As we look at what we currently do, we should be constantly aware of where we want to go.

Notice -- we should be aware of where we want to go, not where we are going. If we identify the destination, side trips are more easily detected and more easily seen as harmful to our estimating progress as a whole.

Covey also identifies what he calls a "circle of concern" and a "circle of influence." By circle of concern he means the sum total of all the things that concern us (in this case, at work) and all the things within that circle of concern which we can influence. For example, I may be concerned about world peace, but how much influence can I realistically have in that arena? Or, similarly, I may be concerned about how my companies superintendents are doing their job, but how much influence do I have on them?

The point here is that identifying those areas within our circle of influence is a necessary to formulate a realistic plan of action about any subject, not the least of which is time management. I would carry the analogy one step further -- initially, as we come up with a plan to manage our time more productively, we may want to focus on those things which are exclusively in our control. This is so because those things are most easily changed, if we have a mind to change them, and we can see the results of the changes most quickly and clearly. If the changes are rational and produce good results, our confidence in our efforts is bolstered, thereby encouraging us to continue our efforts.

Covey has another maxim which is useful at this stage of our effort, "Be Proactive." This is another way of saying, of course, be aggressive, but not blindly so. The rationale for being

proactive is (hopefully) self evident: in order to achieve the maximum impact, we must exert the maximum rationale force.

Another Covey principle is to "Put first things first." In the present context, this does not always mean, put first business things first. There may well be personal items which weigh on your mind, and until they are dealt with, whatever follows from your business life will be less well dealt with. So in some instances, it becomes essential to accomplish a personal task so that business ones can be dealt with wholeheartedly.

This is not to say, of course, that all personal items should be done before any business ones.

Another Covey maxim which is appropriate is "think win/win." This is an acknowledgment of the truth that we are not isolated from others in the industry and are not likely to be so. If our actions are taken at the expense of others with whom we come in contact, they will ultimately fail, to some degree. If we make changes in our methods and styles which make us more productive with the result that others are less so, these will in all probability not be effective.

One final Covey maxim: "Seek first to understand, then to be understood." As an underlying principle of time management, this is invaluable. How much more effective and efficient could we be if we fully understood the issue at hand? How much time do we not waste in doing before we understand completely, then redoing when we understand better?

Here are some techniques to consider as you seek to improve:

1. As stated above, examine your tasks and actions in detail and in writing. This may take several days or even weeks, but it is essential.
2. Eliminate unnecessary or duplicate activities. This step requires real analysis, but it brings the quickest rewards.
3. Group like activities together, so that they may be accomplished at the same time. For example, you may want to answer all your telephone calls at one time during the day, knowing that you are more productive in so doing.
4. Determine your most productive estimating time, then estimate in that time. This cannot be overemphasized. We all have certain times during the day when we most productively deal with various aspects of estimating. We may do our best quantity survey and pricing in the morning. We should make a valiant effort to do those in our most productive times, saving other activities for other times. This helps establish a pattern of putting routine actions in their best time slot.
5. Take it out, put it back. There is a popular saying "If a cluttered desk is the sign of a cluttered mind. what is an empty desk a sign of?" From a time management perspective, this saying may miss the mark. A cluttered desk is probably a sign of a cluttered mind, and it is certainly a sign of wasted time -- looking. Putting things away invariably helps focus concentration on the task at hand, which is the undeniable prerequisite of being more efficient. It

is also, assuming the "putting away" is rationally determined, a necessary condition for minimizing the time needed to find that particular information now required.

6. Have and keep an up to date calendar and use it, but don't spend time recording trivial information in it. Record only the amount of information essential to the matter at hand, then forget it. This is simply a way of freeing your mind from needless clutter.

7. To do list. It is perhaps obvious, but nonetheless important. You will accomplish more if you are aware of what you need to accomplish. The often forgotten corollary to this principle is that the list need not be the length of the encyclopedia, and in fact must not be, to be effective.

8. Plan your day. This includes the estimating work you want to accomplish in the day. We all know that the day will never go as we plan, but to the extent that we have a plan and are able to accomplish part of our plan is to the extent that we will be more efficient.

9. Segment your day. This is related to item #4 above. Plan like activities and productive activities in day segments. An important added consideration here is to plan some free time during the day. Most days this time will be used to deal with the unexpected issues which inevitably arise, and having the time to deal with them and still get a significant portion of your plan accomplished is a noteworthy accomplishment.

10. Isolation. Estimating cannot be fully productive in the middle of an interstate highway. When you do the majority of your estimating work, you should be cut off from the outside world. Tell the secretary to hold your calls, close your door, etc. You will find not only that you are more productive estimating, but also more productive dealing with your other responsibilities, if for no other reason than you are better prepared for them by virtue of having accomplished your estimating work.

11. Examine and change your phone use patterns. Observe yourself on the phone. Catalogue your calls for a period of time, both as to length and as to content. You may be amazed at how much time you waste on the phone. Get an hourglass and turn it over when you pick up the phone. Have as your objective to finish the conversation before or shortly after the sand runs out. By getting in the sand habit, you will be amazed at how focused your conversations become and how much time you save. When you must leave a message for someone, leave a productive message, short, and to the point. Tell the other party what you want so that they may have the information for you when they return your call. This will save both of you time.

12. Delegate -- the right way. There are doubtless activities you do which can be done by others on your staff, those not as highly trained or paid as you. Some of them will doubtless do a better job than you. The rub comes in how you seek to delegate. Remember that the others are busy too, and helping them to become more efficient in what they do so that they can take on your task is critical to your successful delegation.

13. Use up to date tools. This may involve the computer, the fax machine, automated solicitation methods, standard forms and letters, checklists, the digitizer, etc. The greatest

failure estimators make in this area is to feel that it takes too much time to learn to use the tools. The proper attitude is more likely to be to view the learning curve as an investment rather than a cost. The investment will pay off many times over during a career, and besides, your competitor is likely making it and will get an advantage on you thereby.

14. Recreate. Re-create. Efficiency and productivity are robbed exponentially of their effectiveness as the time spent doing estimating (and other work) increases without it. Re-creation is so vital to effective estimating that it, too, should be viewed as an investment, not a cost.

The final technique is not a technique at all, but a frame of mind. It is to continually go through this process of examination and change for the better. It is only in this way, with this habit of mind, that true time management gains can be made.