Achieving Excellence in Estimating

By Lewis Finkel, F.C.P.E.

I recently attended the annual awards banquet for the Construction Institute of Connecticut, and watched as the Special Industry Recognition Award was given to Bob Tucker of Tucker Mechanical.

In his acceptance speech, Bob Tucker paraphrased H. Jackson Brown, Jr., and said that, in his company, they do not strive for perfection, they strive for excellence. They, as a team, work hard every day to do their best for their clients and they, as a team, also learn from their mistakes.

I am an estimator. I am an educator. I am a volunteer leader in a number of organizations. I never actually thought about striving for excellence as opposed to striving for perfection. But the more I thought about it, the more I realized that I have always been on the quest for excellence – and now I think I need to explain that statement and how it applies to both you and me.

In my daily life, I’m a professional estimator, an adjunct professor, a volunteer leader, and a family man. If I was asked which was most important to me, I would say family man.

But whichever hat I’m wearing, I try to do my best and, whichever hat I am wearing, I’m not striving for perfection.

When I’m estimating, I give my best educated opinion on the probable cost of construction for a project after having worked hard to determine the quantities and costs of the various items. If I were striving for perfection, I would be meticulous in my takeoff and make sure that my square footages, my lengths, etc. were the exact quantities to the third decimal place.

In reality, I strive for excellence – where the quantities are very close, but they do not need to be exact. The amount of time it would take to try and achieve perfection would be astronomical compared to the amount of time needed to be “merely” excellent.

When I’m wearing my educator hat, I teach estimating to students in a Construction Management degree program at Central Connecticut State University. Here, again, I teach a practical form of estimating – excellence, not perfection.

I do expect the students to be able to calculate the lengths, areas, and volumes. I do expect them to be able to convert square inches to square feet, cubic feet to cubic yards, etc. But, for example, when they are doing the calculations for a shingle roof in conjunction with an entire building estimate, I do not expect them to calculate the amount of nails needed. Unless they are a carpentry contractor installing the roof, the quantity and the cost of the nails are very small compared to the entire cost of the project.

As you know, estimating is part science and part art. The calculation of the quantities is the science; what happens next is the art. Even if one were to strive for perfection in the quantities, it would all fall apart in the art side of the equation. The estimate is made up of four distinct areas: the first is getting the quantities; the second is determining the material needed and pricing it out; the third and fourth are the labor and equipment needed to install the material. Here is where striving for excellence is required, but striving for perfection will just drive you nuts!

In life, you’re dealing with unknowns. You’re dealing with an estimate of people and what they can produce in a given time. You’re dealing with an estimate of equipment needed and the costs to operate and maintain that equipment. You’re dealing with variable patterns in the weather. You’re dealing with material and equipment supplies that you hope arrive on time. You’re also dealing with scheduling, organizations, and the many personalities of the people involved.

There’s no way that you would be able to attain estimating perfection with all these variables to consider. Excellence, on the other hand, is reasonable and obtainable with a little hard work. You determine the costs of the material, recognizing that you will be close, but never perfectly right. Think about it – you are dealing with people.

An example I often use is having a carpenter up on a ladder and noticing he needs a three-foot piece of lumber. He comes down the ladder. At the bottom of the ladder is an eight-foot piece of lumber. About five feet away on the floor by a wall is a four-foot piece of lumber. What is this carpenter going to do? Will he use the four-foot piece of lumber, thereby saving the eight-foot piece, or will he use the eight-foot piece and saw it down to fit?

So in considering whether you are striving for perfection or striving for excellence, perfection will take a lot of time and may leave you frustrated. Excellence, on the other hand, will get you very close, and is a whole lot more efficient.

The bottom line – always strive for excellence, learn from your mistakes, learn from your successes, keep on learning, and keep on reaching.

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