CLAYTON DEKORNE WITH RICK MILLS, JEREMY KASSEL, AND MIKE WHALEN

Jobsite Etiquette

JLC sat down with Rick Mills, Jeremy Kassel, and Mike Whalen in this first of a series of articles exploring the roles and responsibilities of project managers. Each of these individuals works under a slightly different business model that together nicely span the range of businesses of many JLC readers: Rick is senior project manager for Jackson Andrews Building + Design, a custom builder based in Virginia Beach, Va.; Jeremy operates as a "bags on" general contractor and assumes the role of project manager on renovation projects in and around Albany, N.Y.; and Mike Whalen is a lead carpenter at DBS Remodel, a design-build residential remodeling company based in Poughkeepsie, N.Y.

This first article springs from a presentation Jeremy did at the 2023 JLC Live conference on "Jobsite Etiquette"—a topic that Rick and Mike had each talked with JLC about previously as a possible subject for an article. "Etiquette" seems a fancy word to describe the necessary decorum that project managers must adopt to be effective communicators with clients, trade partners, and co-workers, but it is appropriate to the skillful maneuvering with people that is necessary in the service roles project managers assume. In his JLC Live presentation, Jeremy organized the discussion around the different parties that project managers interact with—clients, employees, subcontractors, and vendors. We started from this premise, focusing on the client-project manager relationship first. —Clayton DeKorne

Jeremy Kassel: When most people think of the term "jobsite etiquette," they probably think of behavior, but it's more than this. It's more than good manners, more than "please and thank you" and taking off your shoes at the door. It includes those, but it is more about (I don't want to say "personality" management, because I think that has a different connotation) how we work effectively with people on the job. This requires certain skills—we call them "soft skills"—but it's also an approach, which is hard to pin down, because there is so much variability in the perspectives of the people involved. While some of these things you can teach, or at least build awareness around, some of them come only with experience. I have somebody working for me who's 24 years old, and he's going to handle things very differently from somebody who's my age (I'm 44).

***JLC*:** If we don't have that experience, can we build that awareness? What are some ground rules, or tools and procedures for working with clients you can pass along to other project managers?

KEY ELEMENTS

Mike Whalen: When it comes to serving the client, I think the key elements we depend on, or build a relationship around, are the project design that we have agreed on with the client, along with the contract that defines the scope of work—the service that we will provide. Once they have been presented to the client, we have a foundation and can walk onto the job confident about what our company needs to provide. They set the tone. The clients trust that we're going to fulfill that contract, and if we go off contract, we have to complete a change order right away, so we make it clear we are doing something different from the contract.

Most of the issues that arise come from the client either not understanding the design documents or having a different idea of the job scope. It's on us—me as a project manager, especially—to make sure we are on the same page about these documents. When something comes up, we have to address it right away. If we don't, and the client holds on [to their misinformed point of view] too long, the harder it is to resolve a problem. As a project manager, I have to protect our company from that occurring.

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But there are times when it becomes more difficult. For example, we had a situation in which the client didn't like the tile installation. I think they were within reason. I had been policing the installer [a subcontractor] on the quality of the tile work and understood where the client was coming from, so I made the call and said, "OK, everything comes out. We will do it over." It's tough sometimes being able to deliver on what's promised and meet the expectations of the client. But we have to stand by our work.

In this case, I put myself in the client's position, and it was clear we had to redo the tile, as difficult as that was to the schedule and our margins. This is the challenging part because it's not straightforward. It was a very fine line. It wasn't a botched job that was horrible, that anyone walking in would say, "Clearly, this has to be redone." Some clients would be willing to accept the installation. We wouldn't want to take advantage of that and deliver shoddy work. But at the same time, some clients can be so picky, and you have to draw a line, so they don't take advantage of us.

In this particular example, my decision ate into the company's profit. Maybe 10 or 15 years ago, I would have been in a panic, thinking, "Now we're going to lose time and money on this job." But I see it differently now: It came down to the bigger value. I saw this as an opportunity for the company. At the end of the day, the customer will remember how we handled the problem. They're going to say, "We weren't happy with the tile. But they came in, and they took all of it out and redid everything to make sure we were happy." While it's a loss now, in the long run it's a marketing win. Not that we're looking for that, but in the moment, you have look at the big picture, and it helps to understand these situations as opportunities.

CLEAR LINES OF COMMUNICATION

Rick Mills: In our company, Jackson [the company owner] is our main salesperson, so obviously the clients have built a relationship with him early on. He needs to clearly turn the project over to the project manager and establish that this person is the main point of contact. We do this by scheduling a preconstruction meeting, and it's important for me to go in there and build rapport with the client right away.

I've been with Jackson about 10 years, so there's a lot of built-up trust between us. I usually handle the preconstruction meetings alone, so my role is usually clear to the client at the beginning. Jackson will come if I ask him, and maybe he'll check in with the client once a month. But it's always clear that I am taking the lead communicating with the client.

That's first—a good handoff from sales to the project manager to build trust with the client so that there's no "Hey, we need to call Jackson and see what he thinks." We definitely don't want a situation where the homeowner wants to speak to the owner all the time about job details the project manager is handling. I see my role here is to protect Jackson from this sort of thing occurring. The job of the project manager is taking that off the company owner's plate, so there is one less thing for them to worry about.

The main goal of the preconstruction meeting is to go over the scope of work. Like Mike said, this is where we need to be very clear. Problems are most likely to come up when a client doesn't fully grasp the scope of the job or thinks something is in that scope of work that isn't actually documented and budgeted.

Of course, we start with the scope of work, but it's always developing. Clients constantly want to do more, and so managing those changes is a big part of the process—getting them priced, drafting a change order, and getting signoff from the client and making sure they are recognizing the changes to the budget.

MW: We have a similar process. We conduct a preconstruction meeting where I'll meet the clients and go over the job scope. The company owner, Brian, used to be the main salesperson, but he has hired on sales consultants, and that has allowed him to take a step back to concentrate on bigger-picture concerns for the company. He may stop by. It depends on the size of the job; it could be every two weeks. It could be once a month. Same kind of thing, though: My role is to make sure that clients aren't calling him all the time about the job.

We use Builder Trend, which I update every day, and he will track the progress of jobs through this. But it's on me to make decisions in the course of the job, even when it has an impact on the bottom line, like the tile decision. A company owner has to have project managers he trusts. He needs to know you have the best in mind for the company. Every project manager is going to have a track record of how their jobs come in and if they're profitable based on the decisions that project manager makes.

At the end of every job, we do a job analysis—an autopsy of how I did. That's something that everyone can look back on. It includes a look at how I did ordering materials. We don't use purchase orders that need to be approved, because that can really slow things down. But I'm accountable for material orders, and I have to stay conscious of what's in the budget. How well I do will come to light at the end of the project. This system gives me a lot of independence but also makes me accountable. I think it shows a lot of respect for my abilities, and it relies on the respect I have for the company's goals.

DON'T WAIT TO ADDRESS ISSUES

RM: While I do try to protect Jackson, the owner, it's also important to recognize when I need to call him in to help resolve an issue. Of course, we all want to handle those issues ourselves. And the way to do that is to jump on them as soon as they arise and make sure things never escalate to an extreme level. Recognizing when a communication problem arises between you and a client, or when a client is uncomfortable with a decision, or even when you see something go wrong on the job—the wrong delivery, something damaged, or a mistake by a subcontractor, or anything that might have financial consequences—you need to step in and let the client know right away that you see the problem and are working on it. It's so much worse if the client discovers it for themselves. I'm also going to reach out to Jackson and fill him in. He may not need to step in, but he needs to know what's happening.

Yes, you have to be responsive and not let things wait. But of course, there are going to be people who you just know you're never going to please. Hopefully, our sales process has weeded out those clients who may be really difficult or who can't make a decision, the husband or wife who can't agree, most of the problem clients. We do have to say "no" and not take on some jobs. Of course, it helps that we're still in a market right now where there's plenty of work and we can pick and choose the jobs we want to take on.

So, yeah, it's being selective with your clients, but honestly, most of them we have a blast with. There are ups and downs over the course of any job, and we work through them, but everybody gets along fine, and I think that comes not just from us being selective about clients but from clients being selective about who they want to work with as a builder.

MW: Early on when I was project managing, I think it was just more of a pride thing: I felt like I needed to take care of as much as possible on my own. I felt that if I didn't, Brian would think I couldn't handle it. It took me awhile to learn when and where it's necessary to get him involved. I agree, the owner needs to be kept informed when things go awry. At the same time, there are a lot of hard decisions he's not going to be the best to handle. He's not in the mix. As he should, he's delegated everything to others, so he may not have all the answers. I have a better grasp on the details because I'm on site all the time.

AWARENESS OF OTHER PEOPLE'S DOMAIN

***JLC*:** Ideally, a contract would include some sort of rules of the road for how you communicate with clients and how they communicate with you. But these are going to be broad: They might spell out the process for conducting a preconstruction meeting and will reference the scope of work and hopefully set some boundaries on when clients can call and who they should call with questions. But there are a lot of little things that the contract doesn't cover. To help us with these, are there any guidelines you can offer on how project mangers should conduct themselves going into a new job, especially in remodeling situations where you are literally living in their home for a time?

JK: In my JLC Live session, I touched on some contractor do's and don'ts for the first meeting and when doing a walk-through of the home with a client. For example, I don't open any doors in any client's house without asking first. It doesn't matter if it's a cabinet door, closet door, entry door, pantry door. You're in someone's home, so you have to keep reminding yourself that this is their space and you have to abide by their rules. Like I always ask if they want me take off my boots and put on a pair of house shoes.

Other things are much less clear, though. What if somebody offers you a glass of wine or beer at a meeting? Is that OK? Or I had one incident when doing a walk-through and measuring for a window replacement job. Taking out my tape measure in the dining room, I set my aluminum, flip-top clipboard on the dining room table. The client looked at me and said something to the effect, and I'll paraphrase, "If you don't take that clipboard off my table, you will not be hired for this job." I was taken aback. It never even crossed my mind that this wouldn't be OK, because the dining room table that I grew up with was not an heirloom. Any protection we put on our dining room table was decorative; you know, if there was a holiday or a party, we put a nice tablecloth on it but not to protect the table necessarily.

As it turned out, that response, the way he said it, was a bit of a red flag, because he was a difficult client to work for. We did end up doing the work, and all in all, we did a good job, and he was happy with it, though not without vocalizing what he was unhappy about along the way and being very particular about a lot of things. This first experience with him, however, was the point at which I thought to myself, "OK, not everybody's built the same." Not everybody has the same mindset as I do. And you need to always remember that you're in somebody else's domain. The awareness of these two things—people's different perspectives and that you're meeting them on their turf—demands that I ask a whole host of questions: Things like which sink should I be washing my hands in, and even which towel should I be drying my hands on. It's their home. They're going to be particular about certain things that are impossible to foresee. All clients, all human beings, whether they're the building owner or even a tenant, are going to be particular about certain things. It could be a clipboard, it could be shoes, it could be where you park your vehicle. The list goes on and on and on when you're working in someone's home.

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***JLC*:** That constant awareness about being in another person's domain you speak of is paramount. Maintaining that awareness takes practice, I think: Being aware and acting on that awareness, choosing to ask rather than assume, is key. It seems like that is an important stand-in for experience. Because experience is the other key, right? You [Jeremy] and Mike both touched on the importance of that. For you, Jeremy, these learning moments—the clipboard, the hand towels—were eye opening when you first encountered them. They gave you that insight, and the next time you were in a client's home you were reminded and knew what not to do and knew to ask first. And that's exactly how our experience grows. As experienced project managers, you have all developed a natural way of working in a person's home. But until project managers gain that experience, they have to learn to maintain an awareness, an alertness to how others have different perspectives, which they need to respect.

I want to ask, Rick, I know a lot of the jobs you do now are the bigger projects, mostly new construction and not necessarily living with the client during the workday. What are the little client issues you deal with on a new build that aren't necessarily spelled out in the contract?

GRAY AREAS IN THE CONTRACT AND SCOPE OF WORK

RM: Certainly, there are communication issues. Most relate back to the scope of work and the contract, as Mike pointed out. Even in new construction, it's common to find some gray areas that weren't spelled out specifically in the contract or scope of work. If it's something we missed, like the shower door, then we're just going to take care of it. But other times, the client will misremember what was in the scope of work, or they had one thing in mind that didn't really get expressed at the design phase.

Here's one example: We had one-piece crown scoped in, but the client was expecting a larger, three-piece crown. That can create some frustration for them. I wasn't in those meetings, so it's hard for me to speak to what happened to help that frustration.

It's important for me not to make any judgments or speculate in any way on how that might have happened. Speaking from a place you're not certain about can go sideways, and I try to avoid that. What I can do is be clear that the job wasn't priced for one-piece crown and show them what it will cost to change it. That doesn't take away the frustration, but it shifts the focus away from why it happened and toward how we move forward. There's no perfect solution, but if you can move on effectively, they'll usually get over it and be like, "Yeah, that's fine. Let's get the price for the three-piece crown."

LEARNING HOW TO READ PEOPLE AND SHIFT PERSPECTIVE

***JLC*:** There's a lot of finesse involved when the client is not OK with paying more or with not getting what they think they now want, like the three-piece crown. You have to be super-diplomatic to keep the client's emotions from taking over. I used to have to remind myself I was in a service position with clients. It's a fine line because you don't want to grovel or show too much weakness because some people may take advantage of that, as Mike mentioned earlier. I think this stems sometimes not so much from their greediness, necessarily, but more from emotions around asserting what they want, which might spiral out of control. But at the same time, you want to be respectful and be there to serve. That's a fine line to strike. Any tips on how to finesse this?

RM: That's something we've learned over the years. From early on, Jackson has done a really good job of protecting our reputation. Like with Mike's tile example, there have been plenty of times where we have done something that we had to pay for to make sure the client felt satisfied in the end. We did that knowing the client will remember and tell their friends that we made it right even though we had to eat that. That's what gets you a good reputation and gets you good jobs in the future. But you're right, we have faced certain personalities that get carried away with their emotions.

MW: There's a skill in being able to read people that can help you avoid getting taken advantage of. But it's hard to teach. It's an awareness. And there is a whole range of personalities that force you to adapt how you communicate. For example, if someone starts out very nervous, concerned, asking a lot of questions. You need to read that and shift to that. I'm working for a client like that right now who just left for the city where she has another place. I have to send her lots of pictures. I have to do a lot more back and forth with her.

In our company, we spend a lot of training time on EQ, emotional intelligence, by working through different role plays to help talk with people in certain difficult or unfamiliar situations on the job. A lot of it has to do with being able to shift your perspective. We've had project managers in the past that couldn't make this shift. They weren't able to deal effectively with, for example, employees who made mistakes or with vendors when a delivery got messed up. Issues with deliveries and material orders come up a lot: It isn't going to be delivered on time; the truck broke down; it's not going to be here until next week. It's sometimes difficult to be understanding, especially when we're on a schedule. But it's going to pay off if you treat them well and can be understanding. The pay off is that when you need them, they're going to go out of their way and remember how you treated them when things got tight. There's also a payoff in being able to work with a tough client. It can help you retain employees and just have good working relationships with trade partners and vendors.

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RM: I would say with all of our trade partners and vendors, we really like to be the intermediary and be the only person who interfaces with the client. Occasionally, it might be necessary to bring a trade partner into the discussion to discuss a certain detail we might not have knowledge about. But as a rule, we always want to assume that lead role communicating with the client.

I think this makes it easier on the client. You're the only person they need to worry about communicating with. It's the project manager's job to go to the different people from there. It's also nice for the trade partners and vendors.

When you're talking to a trade partner or vendor, it's often best to shoot straight—get right to the point and not tiptoe around certain things. And they shouldn't have to worry too much about how they speak. It's our job as project mangers to work out what they mean and what course of action to take from their observations or opinions. But you don't want that trade partner speaking that direct [unfiltered] to the client. It's better if we interpret those remarks and say it to the client in a way they can hear it best.

JK: I agree that it's important to protect trade partners and vendors. It's also important that we maintain a healthy separation between vendors and trade partners and the client. I learned this early in my career when speaking with the client about a door I was installing. I referred several times to the name of the person at the lumberyard, Butch, who supplied the door. Well, then the client had a problem with the door and called the lumberyard, asking for Butch. The client should have come to me with that issue. Clearly, it was my responsibility. The whole thing snowballed, because then I had Butch asking, "Why is your client calling me to handle this? Why aren't you handling it?" So, yes, we need to establish that single line of communication with the client but also stay conscious of how we maintain it.

***JLC*:** There's a lot to digest here and we have only begun to scratch the surface. Let's pick this up in the next session, looking more at the project manager's etiquette with trade partners as well as with employees.