

My Two Bits

If there’s one thing engineers, geologists, contractors’ project managers, contractors’ superintendents, field personnel, and other construction professionals all do well, it’s communicate.

NOT!

In fact, it’s the woeful lack of effective communications skills that may be the only trait construction professionals actually have in common. And they know it. They tell me about it, and ASFE’s collection of case histories of project disasters verifies their reports. That being the case, you’d assume more construction professionals would spend more time documenting the communications process, to lower the risk of miscommunication. But such an assumption would be off the mark. “We’re lousy communicators” seems to be not so much an evaluation as an excuse for not trying to improve. That’s unacceptable. So my intent here is to relate some basics of documentation; some of the ABCs of, “Here’s what I think you said. Can you verify that I heard you correctly?”

First, understand that anything spoken – anything communicated orally – is subject to misinterpretation from the get-go, and then to the infirmities of human memory. And because oral communication is something we rely on so much, we truly need to commit to writing – i.e., document – anything important that we say. But we need to document effectively, because, otherwise, we’re just wasting time.

How to avoid waste? Ask the six questions: Who? When? What? Where? How? and Why? *Example:* We speak with Bill Jones about some additional tests Bill needs. Bill says, “We need six more borings down to the 30-foot level and tell me what you find. I need the results in a week, at the latest.” We want to document the discussion, so we write a note to file. It says:

Bill Jones called and said he needs six more borings down to the 30-foot level, testing, and a report of findings, in a week.

Good? Nope. Unless the documentation is self-explanatory, it's not explanatory at all. Accordingly, we will revise the original note by asking our six questions.

The first question – Who? – can be answered by indicating who called whom. Therefore, in examining "Bill Jones called...", we'd ask, Who is Bill Jones and whom did he call? Given that Bill Jones is really William S. Jones, Downweego Drilling's project manager, and given that the person he spoke with (that's "we," the collective being who is preparing this note) is Andrew S. Flint-Edwards, we could improve the note by writing:

William S. Jones (WSJ), Downweego's project manager, called Andrew S. Flint-Edwards (ASFE), Geowiz' project manager...

Up next – and not a moment too soon! – is When? The call came in on November 8, 2007, a fact we need to memorialize. In doing so, the temptation would be to write, "On 11/8/07, William S. Jones (WSJ)...", but that could be problematic, because – for many people working in the U.S. – 11/8/07 is August 11, 2007. So, to avoid any confusion, we'd write, "On Nov/8/07, William S. Jones (WSJ)..." But we can easily do better than that, by including the time. It only takes a moment to do so, and who knows when the information might come in handy. The result: "On Nov/8/07, at 0925, William S. Jones (WSJ)..." We'd use 24-hour time, of course, because it's better than the AM/PM method insofar as risk management is concerned. And answering When? throughout the note, we'd have:

On Nov/8/07, at 0925, William S. Jones (WSJ), Downweego's project manager, called Andrew S. Flint-Edwards (ASFE), Geowiz' project manager, to say WSJ needs six more

borings down to the 30-foot level, testing, and a report of findings, by Nov/15/07 at [????WHEN].

We'd use ["????WHEN]" because we don't know what the deadline is...because we didn't ask. Which means we'll have to make a follow-up call.

What? comes next, and we can apply it to testing. What testing does WSJ want? And what kind of a report? Will an initial oral report suffice (given the tight deadline) followed by a written report? So the note would then become,

On Nov/8/07, at 0925, William S. Jones (WSJ), Downweego's project manager, called Andrew S. Flint-Edwards (ASFE), Geowiz' project manager, to say WSJ needs six more borings down to the 30-foot level, [????WHAT] testing, and a [????WHAT] report of findings, by Nov/15/07 at [????WHEN].

Where? is next. We can start with, "Where was WSJ when he called and where was ASFE?" If we know the answer, we can insert it. If not, it's probably not worth asking about. In this case, we do know, because Bill mentioned it in passing. Accordingly, we can write, "On Nov/8/07, at 925 hours, William S. Jones (WSJ), Downweego's project manager, was at the Green job site and called...." But here's a catch, something taught by a particularly horrific ASFE case history: Reporters should report facts, *not* what they are told are facts. As such, instead of writing "... William S. Jones (WSJ)...was at the Green job site....," we'd write, "... William S. Jones (WSJ), Downweego's project manager, called Andrew S. Flint-Edwards (ASFE), Geowiz' project manager. WSJ said he was at the Green job site and needs six more...." Might WSJ take this as a slap at his integrity? Not likely, but, if he did, it would give us a great opportunity to teach WSJ what effective documentation is all about.

The next Where? or two would relate to where ASFE was when he took the call, where the borings should be drilled, and where the report should be delivered. Thus, our work in progress would now read,

On Nov/8/07, at 925 hours, William S. Jones (WSJ), Downweego's project manager, called Geowiz' project manager, Andrew S. Flint-Edwards (ASFE) in his office. WSJ said he was at the Green job site and needed six more borings [????WHERE], down to the 30-foot level, [????WHAT] testing, and a [????WHAT] report of findings [????WHERE delivered], by Nov/15/07 at [????WHEN].

The fifth question – How? – initially would apply to how WSJ made his call. Because we have caller ID, we knew that WSJ was calling via cell phone, thus permitting us to write, “...Downweego's project manager, cell-phoned...” The next How? would apply to how WSJ wanted the report delivered: orally (a question also being handled by What?) or, if in writing, delivered how? Electronically? By overnight delivery service? Again, more follow-up would be required, leading to, “...and a [????HOW] [????WHAT] report of findings [????HOW delivered] [????WHERE delivered], by....”

The final question is the metaphysical Why? And by posing it, we can function as more than just an order-taker. Why does WSJ need six more borings? Why to the 30-foot level? Why where he is designating? Why does he want the kind of testing he's calling for? And so forth. By getting answers, we may be able to suggest alternatives that could be faster or less costly, or that could deliver results that are more reliable. Who knows? But one thing is for sure, a reason exists for more borings being required, and by getting more involved, we may be able to provide a far better service.

So what do we do with our note as it now stands:

On Nov/8/07, at 925 hours, William S. Jones (WSJ), Downweego's project manager, cell-phoned Geowiz' project manager, Andrew S. Flint-Edwards (ASFE) in his office. WSJ said he was at the Green job site and needed six more borings [???? WHY] [???? WHERE], down to the 30-foot level [????WHY], [????WHY] [????WHAT] testing, and a [????HOW] [????WHAT] report of findings [????HOW delivered] [????WHERE delivered], by Nov/15/07 at [????WHEN].

We'd call WSJ, of course, to get the questions answered. Then, once we filled in the blanks, we could send the note to WSJ with a cover note to the effect of, "I memorialized our conversations with the following note, Bill. Could you please look it over to make sure I got it all right? I'd really appreciate it."

Bill's initial reaction might be on the order of, "What the heck is this?" because he probably wouldn't have seen anything like it before. But he would review it and be impressed by the amount and clarity of the information captured, and how accurate it is. The next time he wouldn't be surprised by such a note from us, and the time after that he may actually realize he likes dealing with us because we get it all down for review and for the record.

Needless to say, having the ability to document so well becomes an important asset, because it gives us the ability to avoid miscommunication, misunderstanding, and disputes. It also gives us the ability to gain the benefit of the doubt. And as for the habit of inserting question marks on review, after a while we won't have to do it, because we'll get into the habit of asking the right questions to begin with, thus also enhancing our oral communications skills.

It's really easy to do all of this, and it really works. But you do have to make an effort. "We're lousy communicators" doesn't work any more.