

## Rules For Getting Organized With Software



**By Harry Hollander** • Software can play a big role in optimizing and organizing your shop. When you're disorganized, you waste money on avoidable mistakes, waste time searching for information and frustrate customers with poor service. Here are some examples of how this happens:

- You fabricate a top incorrectly after an order change.
- You spend 30 minutes looking for a file folder that is on someone else's desk.
- New employees need months of training because there are so many procedures that have to be memorized.
- When someone in the office is out sick, critical details about a job are unavailable.

When your shop was small you didn't have problems like this. What went wrong? As your shop grew, the amount of information you had to manage grew as well. Unfortunately, the way you manage this information hasn't kept up with the growth of your business.

How do you get organized? As the owner of a software company, I'd love to say you could just buy software and the problem will fix itself. But the real solution is to implement an information management process. The purpose of software is to facilitate this process and make it efficient.

What process can get your shop organized? There's no one answer that will work for everyone. The process you currently use has evolved over time and is based on your products, your employees, your customers, your suppliers and many other factors. So taking someone else's process and trying to implement it in your shop is sure to fail.

The way to get organized is to fix what's broken with your process. Below are some rules for managing information in your shop. Following these rules will keep your shop organized and your customers, employees and owners happy. But it's very difficult to follow these rules if the only tools you have are file folders, whiteboards and spreadsheets.

### **A Place For Everything And Everything In Its Place**

To be sure that you'll find the information you need about any job, you need to centralize where it is kept. Not everything needs to be in one place, but everything needs to be in the right place. Without using software, this can be hard or impossible. For example, if you keep job information in file folders, those folders could be on anyone's desk. Even though there's a place every folder should be, you're not guaranteed that any folders will actually be there.

Everything that happens in your shop needs to be standardized if you want consistent results. When you are looking at a quote, you shouldn't care if you made it or someone else did. The prices and the formatting are the same. All of the jobs go through the same steps, so you can

figure out the status of any job and easily tell if something is missing or incorrect. When everything in the office is standardized, training a new employee becomes much easier.

### **I Get By With A Little Help From My Friends**

When you distribute the work in your office, you take work that only one person could do before and spread it out among multiple people. Without distributing the work, you can't grow because you're limited by what one person can keep in their head. If work is distributed, more than one person can do any task even if someone is out sick or on the phone with a customer. Having a distributed process also lets you break up the work into smaller tasks

The information you need to do your work should be instantly available even if someone else is looking at the same job. If you're editing a spreadsheet, only one person can edit it at a time. If you're using a whiteboard, you have to get up from your desk, or even call someone on the phone at a different location. Integrated software lets multiple people access it at the same time from multiple locations.

Whenever you look at details about a job, you always need them up-to-date. Everything in your shop changes — dates, customers' minds, supplier shipments, employee vacations. If you're not using software, you can easily get information that's not current. If you're updating a job folder and a whiteboard, you might change one and forget to change the other. If you're putting a change order into a folder and staple it to the back instead of the front, it may be missed by the next person who looks at the file.

### **The Truth Is Out There**

When information is ambiguous it can be misinterpreted. Your process needs to ensure accurate communication within your shop, as well as with customers and vendors. If you want precise information, you must have a consistent process and standard ways for communicating. Handwritten notes on a drawing or job folder can be problematic. If someone can misinterpret those notes, your process isn't precise enough.

If you only did one countertop per week, you'd be able to store everything in your head and not make too many mistakes. Once there are multiple people involved, communication becomes critical. Having a process that follows the rules above is the best way to manage information in your shop, and software is the tool that can make it happen. ■

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