Vermont Society of Land Surveyors
Spring 2018 Seminar

Survey Project Management

A Practical Approach

Tim Patch, PLS
SGC Engineering, LLC
Surveying and Project Management

Agenda

• Part 0 - Marketing
• Part I – Securing the Project
  • Client Needs
  • Project Understanding
  • Staff
  • Proposal
• Part II – Executing the Project
  • Organization and Staffing
  • Kickoff and Safety
  • Data Acquisition/Data Management/Tracking
  • Accounting
  • Closeout/Lessons Learned
Part 0- Marketing
Approach or Lack Thereof

• Repeat Business
• Industry Reputation
• Everyone “Markets”
• Tools
Part I - Securing the Project

What do you need to Manage? What is the Priority?

- Client
- Project Understanding
- Staff
- Proposal
Part I - Securing the Project

What do you need to Manage? What is the Priority?

• Client
  • Communication
  • Understanding Needs vs. Expectations

  ▪ Who – You & the Client
    ▪ Key Personnel
    ▪ Hierarchy & Rules of engagement
    ▪ Project Politics
  ▪ How – Client Preferences
    ▪ Phone/Email/Text/Social Media
    ▪ Other

  ▪ When
    ▪ Regular Interval
    ▪ Project Milestones
  ▪ Why – CYA!
    ▪ Regular Updates
    ▪ Changes to Scope
    ▪ Issues
Part I - Securing the Project

Information Gathering

• Project Understanding
  • Scope
    • Define (with Assumptions)
    • Refine
    • Finalize
  • Schedule
    • Targets / Milestones
    • Impacts to Staff Levels
  • Budget
Part I - Securing the Project

What do you need to Manage? What is the Priority?

• Staff
  • Credentials
  • Expertise
  • Availability
    (Internal and 3rd Party)
Part I - Securing the Project

Proposal Preparation

• Proposal
  • Writing
  • Fee Estimating
  • Schedule Estimating
Part I - Securing the Project

Proposal

• **Proposal Writing**
  • Fully Understand RFP Requirements (if responding to one)
  • Documentation Mistakes Could Lead to Disqualification
  • Address Scope of Work
  • Suggest Alternatives (if allowed)
Part I - Securing the Project

Proposal

• **Fee Estimating**
  • Time & Materials/Cost not to Exceed/Lump Sum
  • For proposed scope and schedule / For Alternatives
  • Basis for your Fees (Assumptions)
Part I - Securing the Project
Proposal

• Schedule Estimating
  • Past Project History
  • Potential Impacts
Timothy Patch, PLS

SGC Engineering, LLC
tim.patch@sgceng.com
Part II – Executing the Project

• Organization and Staffing
• Kickoff and Safety
• Data Acquisition/Data Management/Tracking
• Financial Accounting
• Project Closeout/Lessons Learned
Part II – Executing the Project

• Organization and Staffing
  • Internal Roles and Responsibilities
  • Client Management Roles
  • Technical Needs and Responsibilities
Part II – Executing the Project

• Kickoff and Safety – You and the Client
  • Client Communication
  • Expectations of Staff
  • Safety Focus and Priority
Part II – Executing the Project

Data → Information

• Data Acquisition/Data Management/Tracking
  • Defined Workflow from Field to Office to Delivery
  • Robust Data Management
  • Definition of Progress Tracking
Part II – Executing the Project

• Financial Accounting
  • Payment Terms
  • Setup of Phases and Staff Types
  • Reflective of Project Goals
  • Reflective of Assigned Staff
Part II – Executing the Project

• Project Closeout/Lessons Learned
  • Timely Review at Project End
  • Complete Management Evaluation
  • Complete Technical Evaluation
  • Financial Assessment
Other Related Topics

• Document Control
• Data Security/Cyber Vulnerability
• Audits
• Warranty
Thank You

Comments and Questions?

Timothy Patch, PLS

SGC Engineering, LLC
tim.patch@sgceng.com