How to conduct a successful walk-through

Be prepared by doing your homework before and after the visit.

BY BRUCE WILSON

TAKE AWAY

Determine what you want to gain from a walk-through.

Review your records and see whether there are new or existing issues to resolve.

Follow up on any action items that result from the walk-through.

Managers and account supervisors shouldn't take job walk-throughs lightly. If you're unprepared or become surprised during a walk-through, you begin to lose a client's trust — and eventually the job.

So, here are some best practices to consider:

› **Determine objectives.** What do you want to gain from the walk-through? Is it a follow-up to a prior walk-through in which you'll need to demonstrate you've followed through on commitments? Are there enhancement opportunities? Is the main objective to confirm the client's satisfaction? Are there specific site issues that need to be addressed? Can you improve your position for renewal?

› **Review client status.** What do you know about the client? Are there unresolved problems? Are there any changes in the client status, such as new owners, a new contact person, new boss, etc.? Is there going to be a visit by ownership or investors? Are there other client events on the horizon? Does the client owe you money? Do you need to bring any documentation?

› **Review job site status.** Visit the site before your walk-through, and make sure everything is as it should be. This way, if problems exist, you're prepared already. Talk with the crew leader to find out whether there are any additional issues to discuss. Make sure your open punch lists are complete. Know the contract specifications — what's included and what's extra.

5 KEYS TO EFFECTIVE WALK-THROUGHS

1. Determine objectives.
2. Review client status.
3. Review job site status.
4. Develop a strategy.
5. Make sure there are no surprises.

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› **Develop a strategy.** Who should attend a walk-through? How will you deal with any known issues? While you shouldn't accept any excuses, don't be defensive. Be prepared with answers and action plans if needed. Try to be in a position of strength. Have enhancement proposals ready if appropriate.

For the walk-through, be on time, dress appropriately, and point out the positives and areas that have improved. Don't wait for the client to find fault. Listen carefully to what the client is and isn't saying. Try not to make commitments until the walk-through is complete. Clarify if items are contracted or extra work on the spot.

After the walk-through, notify your employees about the commitments, and create a follow-up timeline for the action items. Formalize your walk-through notes; keep one on file and send copies to your client and your employees. Prepare proposals for extra work, and follow up on line-item status in seven days.

Preparation is crucial to having a successful walk-through. Be positive and in control. Don't use excuses or be defensive. Take your lead from your client regarding commitments and timing. Follow up in writing, and check on progress in seven days. LM

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