A Test for Estimators

A few months ago, I wrote about how to hire an estimator. A reader wrote to ask for a test he could give a prospect that would help him hire the right person. Evidently, he is experiencing what we all go through—he has probably hired the wrong person(s). But is there a test that will expose the right candidate, or at the least, point out his deficiencies? The answer is yes, but you won’t find it in a book or magazine article. Each company is different. We do different scopes of work, and even when we perform similar scopes, it can be on completely different types of projects. Also, there are union shops and non-union shops. All the differences mean that a “standard test is just not feasible.

That being said, there are similar traits that all “drywall” subcontractors have in common and that we can use to make an evaluation test for estimators or estimating function. We all need estimators who have the ability to read and understand the drawings. We need them to possess the internal drive, desire and ability for accuracy. We need estimators who can evaluate the type of project and/or determine material waste. We need estimators who can evaluate the details and understand the construction process. We need them to then evaluate the process and determine if it is feasible or not; if not, he needs to know how to proceed with a bid. And most importantly, we need the estimator to evaluate labor productivity for each project or each condition on a project. Based on the above, we can design a company “test” that will help expose the weaknesses and strengths of candidates.

Start by making copies of a floor plan that you have already bid. Make copies of all of the applicable details. I suggest you pick as a sample, a project that is representative of the type of work that you expect the applicant to bid. The first test would be for the prospect to take off something that is relatively easy such as one partition type shown on the floor plan and to then quantify a few materials. He could quantify something like lineal foot of track, studs and screws needed to frame the partitions. Another alternative would be to take off drywall and screws. Both examples will give you a good perspective on the candidate’s approach to estimating the work. Did he generalize or was he exact? How are his math skills? Of course, for him to even begin the exercise, he must know how to read and understand drawings. Be sure to state that the correct material quantities do not include waste! Make the estimator do exact quantities.

The second test would be to take off a more difficult detail from the same drawing. From this single detail only, he would have to quantify all the necessary materials. Once again, he would have to understand the drawings and details, and he would have to go through the math process to determine the materials necessary. This is just a slightly more advanced test question.

The third question for the candidate would be to provide some feedback on the first two examples as far as material waste. How much should be added for each of the above? Is there a difference? Does either of conditions affect the waste needed?

Hopefully, you can find a sample drawing that has a good example of a faulty detail. I know you will have to search through all the drawings you bid to find a mistake made by the architect, but try to find one. If you do, then you can ask the candidate if there are any of the details that have “problems,” and if so, ask for the best method to get things corrected.

The final series of questions would be about labor. What are the expected production rates for the different tasks to be performed? Does the candidate know production rates and, if so, does he just assign an average for the entire project, or does he assign a unit cost? What about the different details? Is there any difference in labor from condition to condition? If so, how much?

All the above needs to be compared to the means and methods used by your company. That is why each company has to make its own test. So you see, choosing an estimator does not have to be by “feel” alone. You can give the candidate a test that will help you make the right decision the first time.

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