

A View from the Back of the Bus

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Project Specifications Review

In my perspective from the back of the bus, I have often remarked that specifications and continuing education are the two best strategies for effectively marketing products to design professionals. Specifications, in particular, are a very effective way of establishing a working relationship with design professionals. In November 2001, we discussed the use of guide specifications and review of office master specifications. The next aspect of specification marketing is providing a technical review of project specifications. There is an incredible amount of competitive knowledge and insight to be found by reviewing and analyzing project specifications.

Typically, product representatives look at project specs to see if their products are specified. While this is of interest, it is far more critical to see how products are specified and to develop an understanding of what the specifier knows and doesn't know. This is the central tactic for technical specification review, understanding what the specifier knows by carefully analyzing the information or lack of information contained in the published specification.

To fully utilize project specifications as a strategic marketing tool, specifications must be thoroughly reviewed and analyzed. The following checklist offers some items for review. It is critical to develop a checklist that is specific to your products and industry.

Part 1 - General

- Look for unclear items or non-industry standard requirements in scope statements
- Look for statements indicate which contractors are supposed to provide materials and/or installation that are non-typical
- Verify related items and items furnished or install by others
- Look for excessive or non-industry standard quality control items such as engineering seals, full size samples, and extraordinary testing requirements.
- Look for excessive or unreasonable material or installation certification requirements that good nullify insurance coverage
- Verify mockups, especially size, location, and ability to integrate into finish work
- Verify extra material requirements
- Verify maintenance or training requirements, especially off-site or factory training
- Review guaranty/warranty requirements, look for non-industry standard requirements or items that manufacturer will not cover under standard warranty

Part 2 - Products

- Carefully review specified products for "fitness of use", is it the right product for the application
- Carefully review specified manufacturers and products for equivalency
- Verify "or equal" or similar language
- Identify industry standards specified and analyze impact on products and fabrication
- If performance spec, determine who can meet requirements or where they came from (sole source spec disguised as open performance spec)
- Carefully analyze fabrication requirements for non-industry standard requirements
- Determine if field fabrication is appropriate instead of shop fabrication
- Verify correct or appropriate reference standards for materials and fabrication
- Verify that specified accessories and related products belong in the section's scope of work

Part 3 - Execution

- Analyze extent of installation directions. Often extensive installation instructions indicates specifier has had problems with the product or has no experience with it.
- If installation is limited to "install per manufacturer's instructions" it is likely that the specifier has limited or no experience with the product.
- If installation is tied to specific industry standards in one place and specific instructions are given

in an other, check for conflicts.

- Verify field quality control is acceptable within industry and local practice.
- Check for extraordinary inspections or quality control responsibilities being required of the manufacturer or local rep.
- Verify extraordinary installed product protection, maintenance, or repair provisions

Once the specification has been carefully analyzed and reviewed, contact the specifier and indicate that, in reviewing the spec, a number of industry and product issues have been discovered that are worthy of discussion. It is important here to focus the discussion on industry and specification issues, not product. If the specifier can be convinced that the reviewer is trying to solve problems, not create them, there is an excellent chance that the spec will get revised. Specification review are a very powerful way to establish credibility with an unfamiliar specifier or design office.

In my experience, I never had a specifier refuse to listen to my spec review issues and 9 out of 10 times got my product added to the spec, even if they had never heard of it before. I never told them I was an architect or practicing specifier and most of the reviews were done by phone and fax rather than face-to-face.

That's my view from the back of the bus, welcome aboard; come on back! Let me hear from you.

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