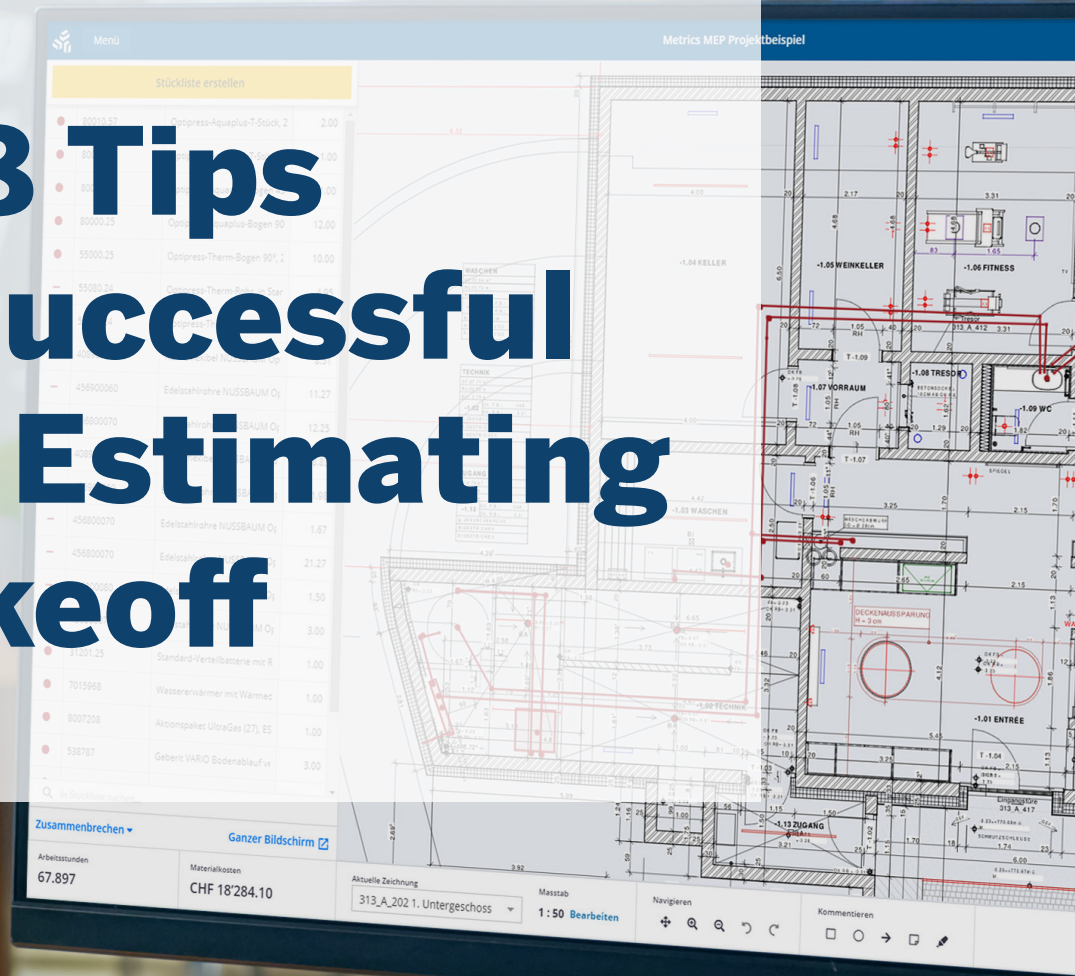


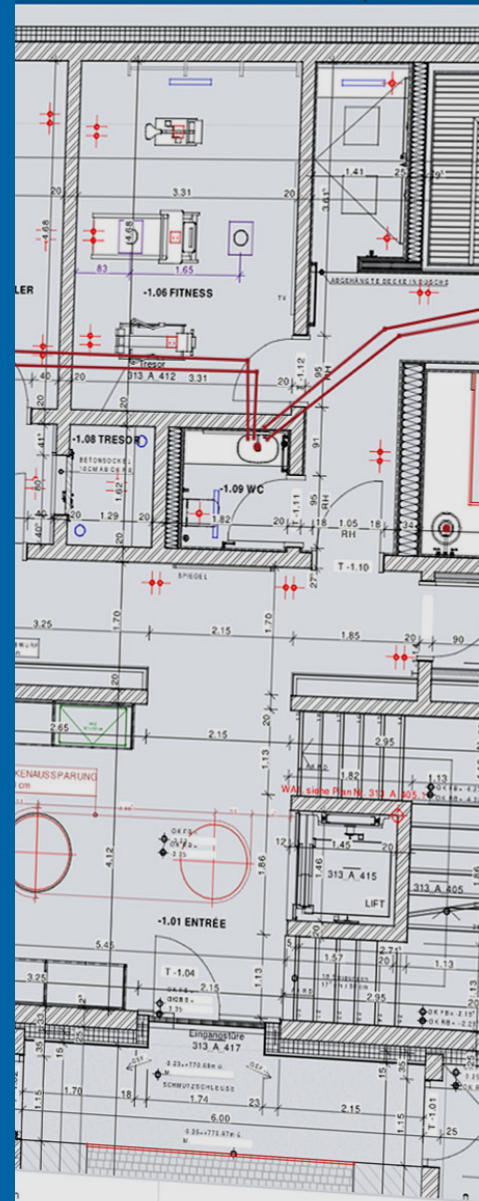
# Top 8 Tips for Successful MEP Estimating & Takeoff



A host of problems can plague MEP contractors and estimators — from unexpected costs to cash flow issues, miscommunication and operational inefficiencies, sometimes it seems like more can go wrong than can go right.

Here's the hard truth: Customers don't really care about excuses. They want an accurate, transparent, and professional bid as fast as possible. Effective estimating requires a fine balance between hard facts and intuition. As you combine the inputs of architects, manufacturers, engineers, and your own expertise, you are expected to synthesise a staggering amount of information into a viable, accurate project estimate and bid. This is no small task.

Then, once the bid has been won, there is still plenty of room for errors and missed opportunities to creep in and erode profit margins. Even though competition continues to put pressure on the bidding process, traditional, spreadsheet-based methods of project management have not kept up. MEP professionals need a way to balance efficiency with accuracy in all phases of their projects. Thanks to improved integration strategies, communication channels, and cloud computing, construction teams are overcoming these top estimating and contract management challenges.



# CHALLENGE

## Lack of information

### # TIP 1

#### Improve the flow of information

When it comes to improving estimating accuracy, the cliché turns out to be true: Communication is key. The more information estimators receive the better the bids will be.

A centralised, cloud-based communication platform can help you to collect, organise and securely share estimates and drawings among project stakeholders — reducing the likelihood of misunderstandings.

Look to leverage estimating and takeoff software that supports shared access. Backed by multi-user support, several users can access the same project at once — making it possible for office administrators to help finish and set up the estimate and leave trade-specific detail to the estimator.

### # TIP 2

#### Create a feedback loop

Feed successful results back into the estimating process. It's true that estimators should learn from their mistakes, but more than anything you need to learn from your successes.

An important step in establishing replicable success is to create a consistent documentation process. For example, you know that to produce a takeoff you will need to know the count, length, area, and volume of various project materials. All of this information can be recorded and leveraged for future projects using digital takeoff software.

Run your overall estimating workflow through similar scrutiny. There will come a time when you can't find the info through external sources, so plagiarise yourself when appropriate. Build off the success of previous projects by creating thorough documentation within a digital takeoff application.

# CHALLENGE

## Estimating isn't your only responsibility

### # TIP 3

### Work within an integrated system

The first step toward wearing many hats without dropping any balls is getting all your data stored in the same platform.

Use estimating software that includes or integrates with contract management software. This will help you streamline your workflow, making for:

- Faster and more accurate quotes
- Easier coordination of procurement lists
- More efficient scheduling
- Better tracking of time sheets to avoid late payment fees
- More control over project costs

Save yourself from late night import and export work and avoid manual errors by relying on the software to automatically transfer data from won estimates to the contract management section of the software.

An integrated system will also help you to manage all your costs and cash flows from one place, making it easier to tell at a glance where your profits stand all your projects.

### # TIP 4

### Cut into the learning curve

Promote cohesion by establishing standard workflows that are familiar and easy-to-use. Look for estimating software that supports familiar takeoff sheets of the past and comes with in-app learning prompts. It will eliminate the need for hours of training on your part and help you get a jump on what really counts: bidding more jobs.



# CHALLENGE

You find yourself limited by time

## # TIP 5

### Leverage automation

Automation is proving to have real-world applications within the field of construction estimating. Some software solutions include tools that can automate recording and data entry tasks. This means that automation not only improves the efficiency of bid development, but also reduces the likelihood of human error.

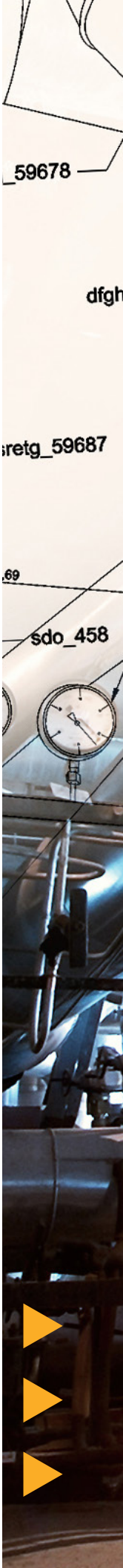
Start small — automate the menial day-to-day tasks that don't benefit from direct estimator engagement. This might include importing/exporting audits, entering quantities, updating specifications, etc. By entrusting these tasks to an automation system, you can focus your expertise on more pressing tasks that impact the satisfaction of clients. In fact, certain automation software can translate information directly from architect drawings. This feature offers symbol recognition functionality that automatically identifies objects within a drawing. By enhancing searching capabilities, automation helps eliminate tedious counting tasks for estimators.

## # TIP 6

### Partner with a managed content provider

Next time you are faced with a new construction project, consider partnering with a managed content provider. This service curates an extensive library of electrical, HVAC, and plumbing part information that can be uploaded into a digital takeoff system. This helps ensure that parts' specifications are accurate and up-to-date. No more manual data entry — this service draws off a library of millions of fully-managed, high-LOD components so you can rest assured you're getting the most viable data possible.

This relationship ensures estimating accuracy and frees estimators from the monotony of manual data entry so they can focus on more pressing tasks.



# CHALLENGE

## Maintaining profits across every project

### # TIP 7

#### Secure the best deals

If you take one thing away from this guide it should be this: build off of past successes. Through digital takeoff, you can leave a trail of breadcrumbs for your next project. Navigation tools and unlimited data storage make leveraging past successes easy. For example, look for takeoff software that offers drawing navigation. This feature helps estimators browse and search past and current plans. Whether browsing by name or by links, this feature helps past plans stay top-of-mind and makes navigation intuitive and realistic.

### # TIP 8

#### Archive processes

Drive down material and labour costs by combining bills of quantities from multiple projects to secure better discounts on building materials directly from your suppliers. Most manufacturers and material suppliers offer discounts for bulk orders — a cost savings you cannot afford to miss out on.

## Estimating software that does it all

Look for software that offers features specially-catered to MEP estimators:

Cloud-based software, integration with contract management functionality, access to LUCKINS - an MEP managed content database, support for both digital and manual takeoff and more - all with an easy-to-use, intuitive interface that mirrors how you already work.

By leveraging a solution tailored to your needs, you can get estimates and bids out ahead of the competition, and increase the productivity and profitability of your next project.

[Learn more on Estimating software that does it all](#)

