



THE SURVEY OFFICE

BY LORRAINE PETZOLD, O.L.S.

OVER THE past eleven years I have had the opportunity to visit and observe survey firms in all parts of the province. In my opinion, the most glaring difference between the various firms is not in the technology they use nor the number of people on staff but rather in the quality of their business practice.

Clients

As a business man, the land surveyor offers a professional service to the public. Many firms have always had, and more and more firms are working towards having, a suitable area in their office to meet with the client and discuss either a particular project or any concerns that the client may have. To many surveyors in various parts of the province, this has always been the manner in which their business has been conducted.

Still, there are far too many firms who would never consider having the client come to them, but would rather run to the client. In the surveying profession it is often necessary for the surveyor to attend at the offices of his client to pick up material, discuss matters, etc. However, at times it also is equally important that the surveyor have the client come to his office to discuss matters.

When you are discussing business matters on your own home ground, in your own office, you are on a different footing with the client. Michael O'Sullivan wrote of the business environment in the Councillor's Corner in the last issue. This article bears re-reading.

Clerical Staff

Why a survey firm would want to be in existence without efficient, competent clerical staff continues to be a mystery.

Across the province there are firms with one or two field crews and a fully-staffed office with people answering the phone, undertaking clerical functions, typing, etc. during each working day. At the same time there are other firms of the same size, that are, apparently, just as busy, who insist that there is no way in which they could afford to have anyone in their offices during the working day. Obviously, something is being overlooked by the latter-mentioned firms in this scenario.

A surveyor in private practice not only offers professional services to the public, he has also assumed a responsibility to his profession. He should not budget his time or his money so that he undertakes all clerical functions either by himself when in the office or with his family assisting him in the evening hours. Although this may be acceptable when one is starting a business, it certainly is not acceptable from either

a personal or business point of view once the business is established.

In a small office, the clerical staff can be versatile, undertaking drafting, reception and telephone duties, typing, etc. In today's economy with the requirements of the Standards and the pressures of the public on the type of service we provide, it is absolutely essential that every office be staffed during the working day.

As well, surveyors are frustrated to find that they cannot contact a fellow surveyor or speak to anyone on his staff between 8:00 a.m. and 5:00 p.m. It is most frustrating to call a surveyor's office only to hear a taped message. Some firms have not invested in a telephone answering machine and callers cannot even leave a message.

Staff

The necessity of having well-trained technical and clerical staff is an item that has been of concern for many years to the members in private practice and to the Association. With the up-swing in the economy, this has become a crucial item. Surveyors are finding that they need more staff than they can find and in order to fulfill the needs of the consumer, they are having to take on staff that is not adequately trained.

The Association, through its series of continuing seminars and courses for technical staff and in co-operation with the community colleges, hopes to facilitate the training of staff over the next few years. The willingness of surveyors to send field staff to the Party Chief Seminars exemplifies the desire of many firms to allow their staff to become aware and more knowledgeable of the responsibilities which they bear.

Finances

Just what is a surveyor worth and how should he value his time? The surveyor, as a professional, simply cannot charge for the hours put in by himself or any of his staff. He also has to charge for "knowing where to put the chalk mark".

The story is told of a retired specialist who was recalled by General Electric to locate a break-down in a complex of machines, the cause of which had baffled all the GE experts. He took a piece of chalk and marked an "X" on a particular part where the defect was located. He then sent a bill for \$10,000 which was considered a highly inflated bill by those who received it. The company protested the amount and asked him to itemize it. He dutifully sent back the itemized bill. One chalk mark: \$1.00, knowing where to place it: \$9,999.00.

Although this is over-simplified and many variations of this story exist, the kernel of that story is quite true. In general,

people who work an eight-hour day or are paid by the hour tend to equate an assignment with the amount of time it takes to complete it. But with our specialty, the real time span of the job bears little relation to the value of the work itself. It may take a doctor twenty minutes to operate, but the patient is absorbing part of the cost of the surgeon's total education and training and many years of experience.

When we pay for "expertise" of any kind, the expert is receiving a kind of "deferred payment" for the usually long and sometimes expensive acquisition of his or her particular skills and prowess. Do you determine what your salary will be prior to setting fees for the year, are you satisfied with what is left? Do you know how much it costs to open the door of your practice each day? In other words, do you know how much you must bill per week or per month to offer satisfactory, professional salaries and benefits to all professionals on staff and satisfactory salaries and benefits to all technicians and clerical staff, with enough money left over to keep both the office and field equipment up to date? Too often the answer to these questions is "no".

In order to assist those surveyors who find that the business part of their practice needs upgrading, the Association will be offering a travelling workshop starting in a few months in various locations in the province. This workshop will deal with the very basics of finance and business management. It will provide the surveyor with the necessary facts by which he can determine how much he should charge in order to open the door each day.

Reporting to the Client

This is another aspect of the vast difference between survey firms across the province.

There are many areas in the province where it has never been the practice to simply mail or send copies of a plan to the client with a bill. Rather a professional letter on the surveyor's letterhead has always accompanied this transmittal. This practice was not put in place due to the Standards, but had been in place since the 1920s or 1930s.

As you are well aware, in some areas of the province, the surveyor does not provide this as a normal business practice. I had a representative of a local firm in the office in the past week who indicated that there was no way he could write letters to his clients as this would cut into his profits. At no time has anyone ever suggested that reporting to the client not be considered part of the total service for which there are professional charges. Within this issue of the Quarterly are several articles regarding reports to the client which must be considered by all members of the Association.

To be a professional, one must not only be capable and have the knowledge of a professional, but one must also appear to be professional. Financially, there is no reason why a survey firm cannot provide with each and every survey either a letter of transmittal or a reporting letter.

Why do some refuse to even consider doing so? Why do some feel that it is financially impossible to offer this service? We have upgraded our technology in the field - let us upgrade our technology in the office. At the minimum, a good quality, self-correcting typewriter or a word processor is necessary to type office reports and letters. Now photocopy machines are available at very modest prices and should be part of every

surveyor's business office. If you feel that you cannot afford these you obviously are not allowing for them when budgeting your total costs for the year.

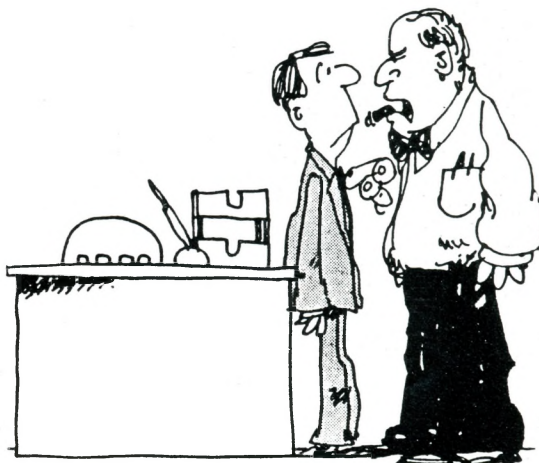
The land surveyor's "product" (plan) is not his most valuable asset. The land surveyor provides an opinion and his "product" is the graphic illustration of his expertise at work. To be of value to the client, this opinion must be usable and clearly understood. The surveyor must ensure that his total business practice is more than adequate to serve the needs of the public and the profession if he expects to profit from his expertise.

One Possible Solution

In today's economy, it is very expensive and very time consuming to operate a sole practice. Several survey firms have looked into the possibility of amalgamating. Looking at the other professional bodies, accountants, architects, engineers and law firms, the trend has been to have firms with more than one professional. In no way are we suggesting that only large firms should exist. However, perhaps it is time that surveyors who are operating as a sole proprietor look into amalgamating with another fellow member who is also a sole proprietor. I am aware of several firms across the province who are doing this at this time.

The saving in technology costs would be immense. The ability to run a business practice would be enhanced and as well, each surveyor would have someone else to rely on to discuss problems with, to obtain assistance from and to have cover for them when they are unable to be in the office, whether for personal reasons, holidays, etc.

If you are a sole proprietor and find that the costs of technology and the demands are excessive, think about amalgamating with a fellow member who is also a sole proprietor and probably has the same problems as you do. ●



'IF YOU FOUL UP WEBER - YOU'RE FIRED!
THAT TAKES CARE OF YOUR TRAINING
PROGRAM - NOW GET TO WORK!'