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By Darren Hudema, WLS

Writing a Technical Report

Editor's Note: This is the final installment of an eight-part series that looks at a dry standard and quality documentation.

Restorers have recently given significant attention to the improvement of documentation on restoration projects that they've been awarded.

This is in direct response to changes that have occurred in the field of water damage restoration. Insurance companies are carefully reviewing documentation to verify whether it supports the work performed and the associated costs of the restoration project. Further, the litigious trend among interested parties pressed the need for restorers to defend themselves with proof that they were competent in their restoration strategy. Many pages of drying records

are presently produced in an effort to answer the 'Four Knows of Drying.'

Does the restorer know:

- What is wet?
- How wet it is?
- Is it drying?
- Is it dry?

These records should also capture a variety of job-related details, such as job location, structure type and use, occupant and owner information, water source, extent of migration details, issues related to contamination and damage, and any other influences on the restoration process.

In the early years of the restoration industry, these important questions were rarely answered

with anything more than a verbal opinion. Documentation was, in most cases, either poor or nonexistent. Of course, any offered opinions had only minimal value in a court of law. Understandably, insurance companies were reluctant to pay the full amount of an invoice with such a lack of supporting documentation. Restorers saw the need to protect

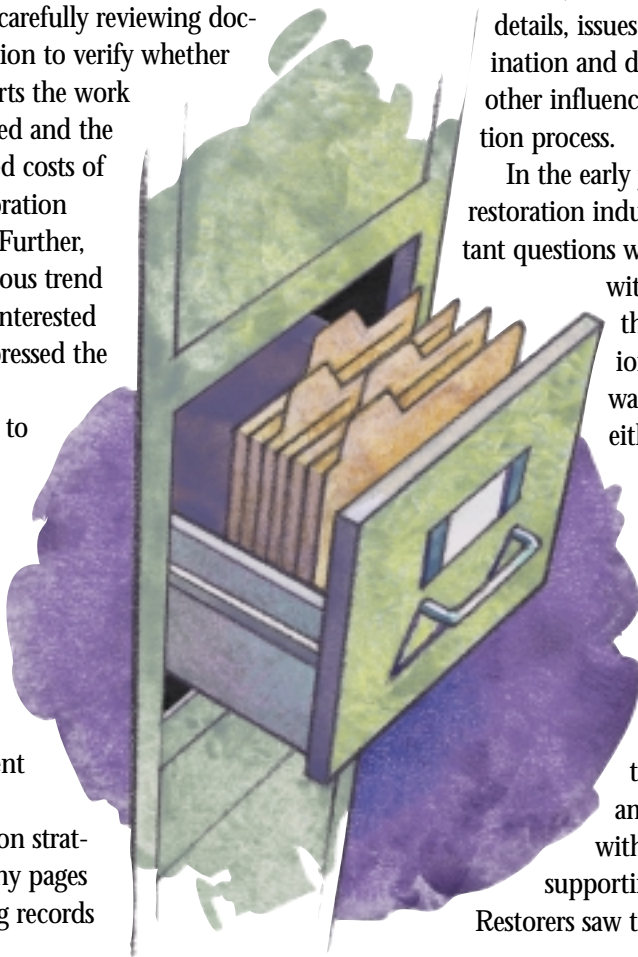
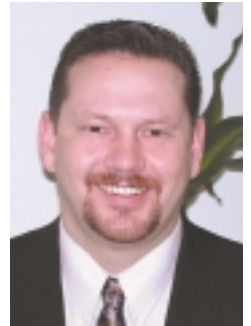
themselves against claims of incompetence and performance failure.

The evolution of documentation has had a long maturation process. Efforts to record critical measurements began with simple numbers on a note pad that may or may not have found their way into the client's file. Not surprisingly, such an inconsistent practice was met with criticism and doubt from those who challenged the restoration process.

Today, most restorers agree with the statement that, "If it isn't documented, it never happened."

How would you feel if you were to receive a subpoena for *any* one of your clients' files? Would you be satisfied with their layout, content, thoroughness and conclusions? Remember, *everything* in that file is discoverable! The opposite is true as well: whatever is *not* in that file is discoverable. Are you comfortable with that thought?

Many adjusters who have attended water damage classes have made the comment that "20-40 percent of your money is being left on the table." Why? "Because of a lack of documentation." Such a statement should give pause for reflection. How many restoration companies have had adjusters call and say they were only going to pay a portion of



the invoice? Most of the adjusters who do this are looking for one thing—justification of the invoice. So, what components should be included in a quality technical report?

The Main Components of a Technical Report

A quality report should provide enough details about the restoration project so that there is a clear picture of the conditions encountered and the restoration procedures employed to return the property to a pre-loss condition.

As restorers, we are similar to doctors. Doctors perform a service using a number of different diagnostic tools in an effort to determine what may be causing the health complaint. They carefully document the results. They use an examination room, X-rays, MRI machines and many other tools to diagnose a problem. When they have determined the course of action that needs to be taken, this is also documented. The solution to the condition may involve surgery, which necessitates the use of personnel, an operating room and the many tools required to perform the procedure. Everything is documented from the moment you walk into the doctor's office. The doctor receives payment only after submitting thorough documentation.

Restorers are not much different. Restorers also have to diagnose the situation, establish the best course of action, decide what equipment will effectively

address the problem and record the results of procedures used to return the structure to a pre-loss condition.

At some point, most restorers will likely have their procedures challenged by the homeowner or insurance representative. This is usually because the individual asking the questions does not understand the science behind the drying efforts, nor the meaning of the moisture measurements in materials. Industry terminology like dewpoint, grains per pound (gpp), vapor pressure, grain depression, water activity, low grain refrigerants (LGRs) and desiccants can be confusing. It is no wonder some become intimidated and seek explanations on what occurred in their structure.

These interested parties are seeking written justification for the process, not a reiteration of the line items on the invoice.

What should this written report look like? By no means does this article claim to cover all the nuances in producing a quality technical report. However, some of the main points that make up a restorer's technical report will likely include the following components:

Title page: Author's name, affiliation, date, etc.

Declaration: A statement that the material in the report is the author's own work and specific to the project being investigated.

Acknowledgement: (If applicable) of any who have helped or influenced the author's work.

Contents list: A list of what is included in the report with appropriate page references.

Abstract: A summary of the content and purpose of the report.

Introduction: Introduces the work, provides the motivation, context and outlines other related work. The background of the water intrusion and the repair efforts may also be outlined.

Main technical chapters: Document the core technical work, test site locations, testing strategy and materials tested.

Conclusions: Lists the author's conclusions and may also identify appropriate future work.

References: A list of the authoritative sources cited that support the report's conclusions.

Appendices: Reference of all material that is not the author's own material.

The author of the document should consider who the reader is and write in a style that is easily understood by most homeowners. The goal is to accurately communicate technical information in a way that the reader can understand, as this will influence the document's readability, professionalism, objectiveness and impact of the report.

Technical reports should be worded in the third person, i.e., as an *objective* observer! Avoid using terms such as "I did this inspection . . ." Instead substitute phrasing such as, "the inspection was performed . . ." The best written

description is not necessarily the same as the best verbal description.

By its very design, a technical report must be *technically accurate*. This includes spelling. If the reader observes many spelling and grammatical errors, the accuracy of the entire document comes under question. Many word processing documents are equipped with spelling and grammar checking features—use them!

Most readers of a water damage technical report will benefit from multimedia incorporated into the document. There is truth to 1920s advertiser Fred Barnard's comment that "a picture is worth a thousand words." Charts, graphs, photographs and thermal images provide the medium to accurately communicate complicated messages

Drying Records Should Include:

- All job-related information (e.g., address, customer, insurer)
- Time and date of loss
- Source of water
- Types of materials affected
- Condition of structure
- Category of water
- Category after migration (if different)
- Class of water
- Pre-existing conditions
- Customer conversations
- Degree of migration
- Degree of saturation
- Any other relevant data
- Name of technician

while offering a visual balance to the document.

The manner in which the inspection is done is of great importance in a technical document. For instance, an inspector may find value in following these procedures:

- What materials are being tested?
- Where is the test site located in the structure? (include photo and thermal image if available)
- What would a person expect the moisture content to be in that geographic area in that season, and what support would they have for that conclusion?
- How close to Dry Standard does a material have to be in order to be considered 'dry enough'? Will there be enough moisture present to support mold growth?
- What is the influence of the present environment on the hygroscopic materials?
- Document that the meter was 'checked' to verify its correct function (i.e., correct settings, mode and application).
- What kind of meter was used on each inspection site?
- Were any corrective mathematics used or needed to determine the actual moisture content in the material?
- If more than one type of test or meter is collected on an inspection site, are they in agreement or do they conflict? What does that mean?
- Does the inspection site meet the criteria for being considered 'done'?
- How does this inspection site compare to others found on the project?

Keep in mind that each of these components of the technical report is valuable to every person involved in the project, and the information provides answers

to individuals when the restoration *procedures or conclusions* are challenged.

With regard to 'conclusions,' this section of the technical report is dedicated to the inspector's conclusions in relation to his findings. Conclusions must *conclude!* They must give some overall insight into the value of the inspector's work, inform the reader as to the meaning and impact of the findings, and include any caveats the reader needs to be aware of. To fill the conclusion sections with a summary of the technical findings is considered a 'cop-out' and does not provide value to the reader, since it concludes nothing! The summary (if present) should be at the start of the document as an abstract, giving the reader the opportunity to see what the report will cover.

Thorough documentation and technical reports will help reduce one of the biggest gaps in this industry . . . communication! It can be the difference between a satisfied customer and a good pay day or a 'no pay' day and our greatest fear . . . litigation. ■

Darren Hudema, WLS, has been in the restoration and cleaning industry since 1989. Before opening his own business in Kelowna, British Columbia in Canada, he managed a staff of 18 people and processed many claims in both fire and water damage. Over the past 17 years he has had the opportunity to work on hundreds of fire and water damage jobs. His work ranged from residential to commercial buildings including a heritage hotel.