



O'Shea Builders Establishes a Winning Cost Estimating Legacy with Trimble WinEst and Modelogix



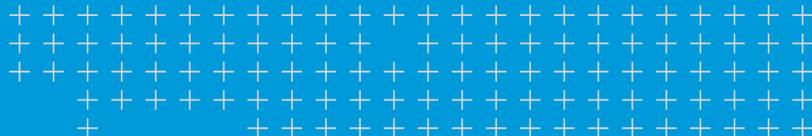
Premier Illinois-based general contractor leverages Trimble estimating solutions to be more responsive and to quickly provide estimates in customers' preferred bid package format for straightforward comparisons and higher-value conversations.

Solution

Trimble Modelogix

Rethink the way construction estimating gets done.

Find out more at gc.trimble.com



overview

O'Shea Builders is a leading commercial construction-services provider based in Springfield, Illinois. The company was founded in 1902, and provides general contracting, construction management, design build, civil and building maintenance services.



Location
SPRINGFIELD,
ILLINOIS - USA



CHALLENGE

Company leaders wanted to establish a more integrated and comprehensive cost estimating process to manage growth, develop best practices for fostering continual improvement, and better support customers. They looked to their new Chief Estimator to develop a standardized process that would allow them to create more accurate and consistent project estimates using cost-knowledge management.

With more than a century of experience in delivering commercial-construction services, O'Shea Builders is a premier general contractor that helps clients through the entire building process from pre-construction to post-construction services to everything in-between. The company has worked with owners across several vertical industries, including K-12, healthcare, faith-based, higher-education, commercial/industrial and retail. O'Shea Builders has earned the reputation as thought leader in the industry for its purpose-built approach and its ability to go above-and-beyond to meet owners' goals.

SOLUTION

Building a legacy

When Chief Estimator Steve Ludwig, LEED AP BD+C, was hired at O'Shea Builders more than seven years ago, he never imagined he'd have the opportunity to build the company's estimating process from the ground up. But, that's exactly what happened.

"When our owner Mike O'Shea brought me on, he essentially told me I could pick any cost-estimating package I wanted," said Ludwig.

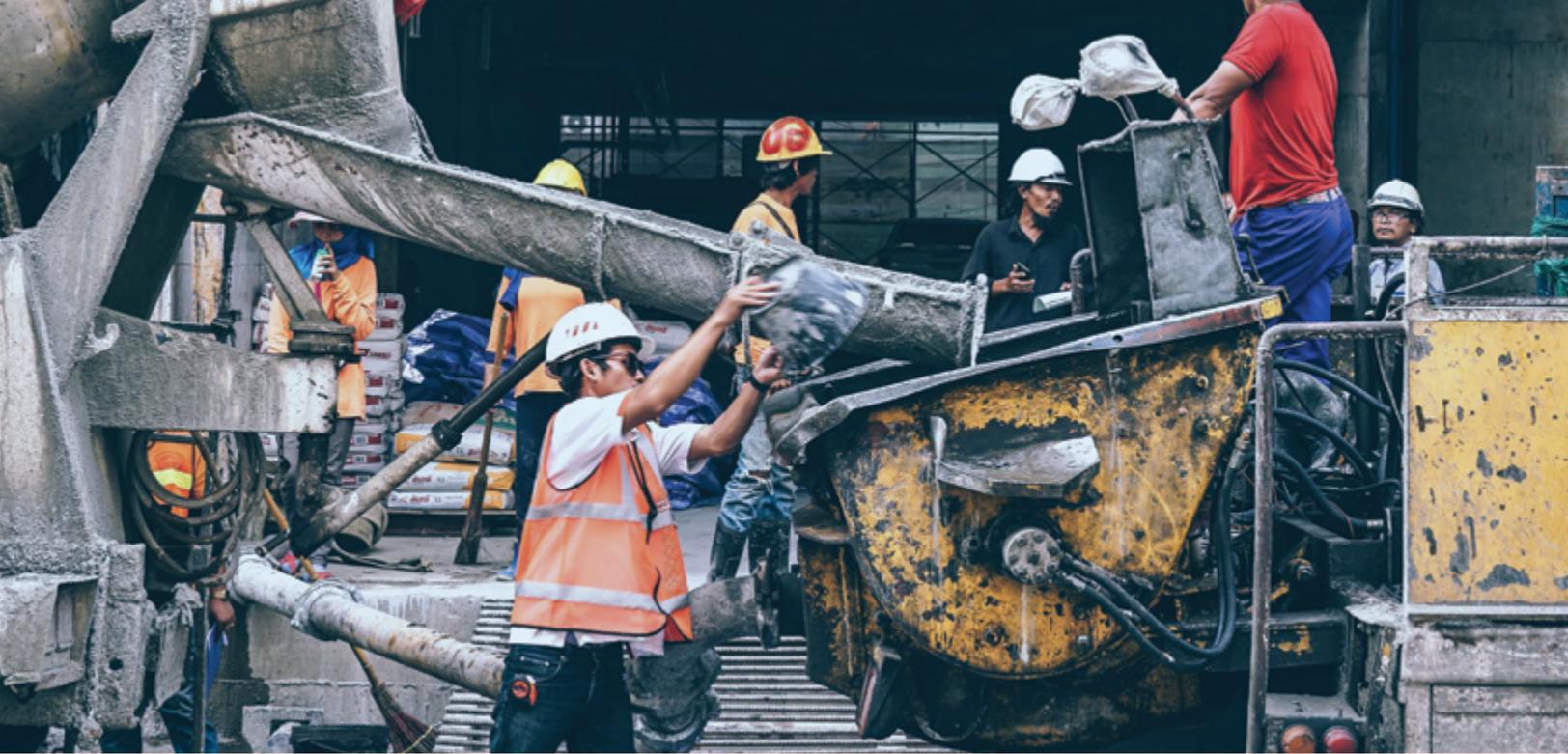
"He wanted us to take our estimating process to the next level and develop a process that was standardized, repeatable and trainable. I took this to heart and started to look for ways to build a cost-estimating legacy. After evaluating other packages, I selected Trimble because I found it offered the most comprehensive and customizable enterprise estimating solution."

O'Shea Builders adopted Trimble® WinEst for its ability to create, manage and update cost estimates in a much more integrated and efficient way. The company also selected Trimble Modelogix to improve the ability to quickly and easily generate conceptual estimates based on completed projects, which would be instrumental to the continual improvement of their estimating process.

Establishing a smarter cost database

Ludwig began by building out the foundation for the company's cost-estimating database within WinEst. He set up job cost codes and created a comprehensive database that includes cost histories and best practices based on invaluable lessons learned from past projects. Capturing this intelligence and making it easily accessible for estimators and key project stakeholders not only drives efficiency and accuracy in estimating cycles but enables a process for continual improvement that translates to better service for O'Shea's customers.

Ludwig says WinEst's robust capabilities for customizable assemblies are best in class. Assemblies are configured to streamline the estimators' workflow, enabling them to ask the right questions to inform better decisions. This might include indicating if a task requires



use of a man lift, or what the soil classification is when estimating costs for concrete foundation excavation work. By including these kinds of details in assemblies, the estimation platform becomes much more intelligent and strategic overtime. Ludwig can include comments to a line item to describe an assumption or include follow-up questions for clarification. This is especially valuable for training junior estimators and ensuring that the company's best practices are applied. For example, when an estimator includes a line item for pouring a concrete footing, the Specification Variable (SpecVar) feature within WinEst will prompt users for the type of admixture required -- superplasticizer, microsilica, fiber mesh, for example. Another SpecVar will ask for the concrete placement method – Tailgate, Buggy, Crane & Bucket, Pump or Conveyor. This ensures the estimator includes the right project details, so the corresponding cost plans are accurate and complete. Lastly, Ludwig likes that the database structure allows tracking of a complete audit trail for every change made to the estimate.

Applying filters to catch errors and save time

WinEst filtering capabilities allow O'Shea Builders to deliver estimates in customers' preferred and standardized bid package format much more quickly than doing it manually.

"The flexibility of creating those filters is really a powerhouse feature of WinEst," said Ludwig. "I can create a filter, so the estimate report fits the standardized bid structure of a particular customer, which is a huge time saver. That way, I'm not recreating the wheel each time and we can follow our best cost planning practices. I can also create filters to see the data more clearly. I can filter daily labor output right next to equipment daily output, which helps me synchronize the equipment productivity with the labor very quickly. That way I look at the estimate

through a different lens to identify patterns and outliers that we should consider, and I can do all that in a fraction of the time it would normally take."

WinEst filtering has also helped Ludwig develop what his team calls a 'high-altitude pass' when it comes to reviewing mid-level estimates, often created by senior estimators. By applying WinEst filters he's able to group together certain components within trade packages, such as finished carpentry work. This allows the team to verify if those values fit into acceptable productivity and cost ranges based on past O'Shea Builders cost parameters. By applying these filters, he can complete a high-altitude pass and review these estimates much more quickly and with greater confidence because he can validate that costs are in-line with cost histories, which greatly reduces potential liabilities.

Growing in the same direction

Ludwig believes WinEst has helped his team to produce estimates with more consistency while also keeping pace with the company's substantial growth over the years. Since adopting WinEst and Modelogix, the team has added 5 estimators to its team and new hires are generally quite excited to learn about the team's estimating best practices, templates and tools.

"With WinEst we now have this integrated cost estimation process that also provides us with extreme flexibility," said Ludwig. "It's helped us build a good reputation for managing everything for our customers from schematic design to design development to construction document drawings. And, because we've all rallied around WinEst, everyone is growing in the same direction which means that when we add new people they can get up to speed relatively fast and they learn about our cost planning philosophy."



Leading to new business opportunities

With a database-driven cost estimation process created in WinEst and cost-modeling from Modelogix, Ludwig believes his team is more flexible and responsive to customers' needs. For instance, O'Shea Builders recently developed a very detailed cost estimate for a major project with Memorial Health System / Memorial Medical Center in Springfield, IL. Memorial's latest expansion effort included the Memorial Center for Learning and Innovation (MCLI), a massive Patient Care Tower vertical expansion on top of the existing hospital, and the construction of a new surgery center, where construction would impact patient and visitor traffic at the main entrance to the hospital. Memorial Health's Board of Directors was responsible for approving the budget. The board also hired a cost consultant to run parallel project estimates to validate the process.

"During the MCLI bid process, I was able to sit down with the vice president of Facilities Management to compare our estimates side-by-side," said Ludwig. "WinEst helped us essentially speak the same language as the cost consultant. I made comparisons and I could show the vice president and facilities staff exactly how we arrived at those numbers. It increased our efficiency so much and for a job like this with so many moving pieces and 'what if' scenarios, I can't imagine doing it without WinEst."

Backing up numbers with real data

The team is also using Modelogix to take schematic designs and see from past efforts how the budget might evolve. This helps with hard

bid efforts as well as helps in negotiating a job because the numbers are based on real cost histories. With only a few pieces of project information, Ludwig explains that with Modelogix and WinEst the team can be much more competitive in bidding and create estimates with confidence.

"One thing that sets us apart is that with WinEst and Modelogix we have data as our backup position in every meeting and in every cost estimate," said Ludwig. "While some competitors are arguing opinions, such as a cost per square foot of roofing, I can show them real data from similar past projects. I can demonstrate how our estimated cost per square foot falls within the standard deviation, so there's really no question. Our budgets mean more because they're backed by data."

Building lasting partnerships

Ludwig stresses that when establishing a comprehensive cost estimation process, it's extremely important to invest in the development and accept that you get what you put into it. He attributes the company's estimating success to his team's commitment as well as the on-going support he's received from Trimble.

"The Trimble support team are extremely responsive, eager to help and very personable," said Ludwig. "They've always been very friendly and quick to respond to my needs. When you're done, it feels like you know them and they're more like a friend helping you figure out an issue. That support makes a big difference."

RESULTS

- ▶ Greater responsiveness - Can quickly create alternates or 'what if' scenarios and compare cost estimates easily with owners and their cost consultants for higher-value conversations.
- ▶ Ability to quickly spot errors - Can apply custom filters to compare values, which helps the team quickly spot any errors and identify patterns and outliers to consider.
- ▶ Improved estimate accuracy and consistency - Tracking and commenting capabilities in WinEst provide a complete audit trail and help describe cost assumptions. This ensures estimators include the right project details and inform others on what is behind the numbers.
- ▶ Filtering capabilities streamline reviews - Filters provide a smart way to quickly and thoroughly review estimating data, helping to improve productivity and minimize liability.

"With WinEst we now have this integrated cost estimation process that also provides us with extreme flexibility"

— STEVE LUDWIG
Chief Estimator at O'Shea Builders

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