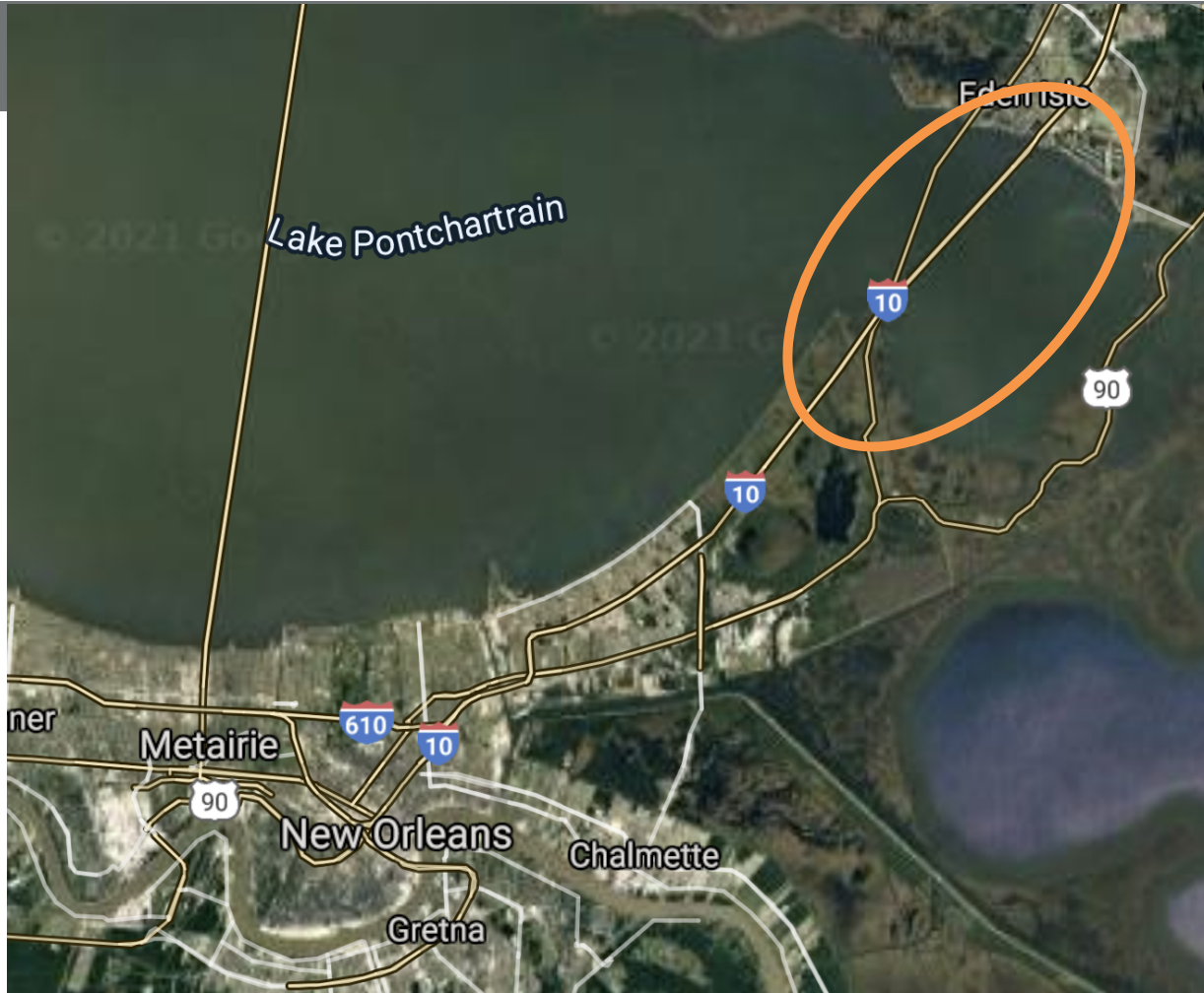


***A Case Study:  
Documentation Pitfalls Can Put You In The Hole***

**Bill Rushing, Waldemar S Nelson & Co., Inc.**

THE WORLD'S GATHERING PLACE FOR ADVANCING CONCRETE





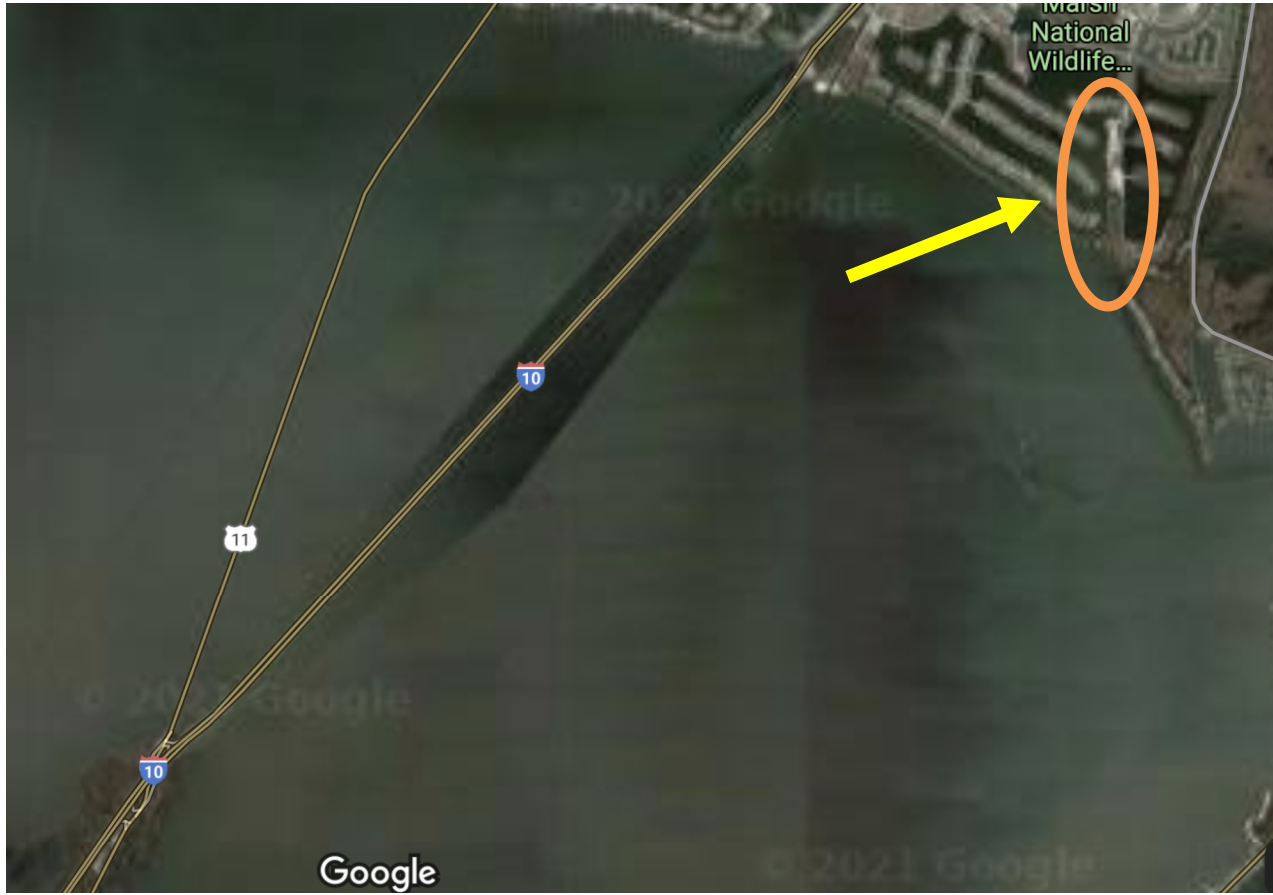
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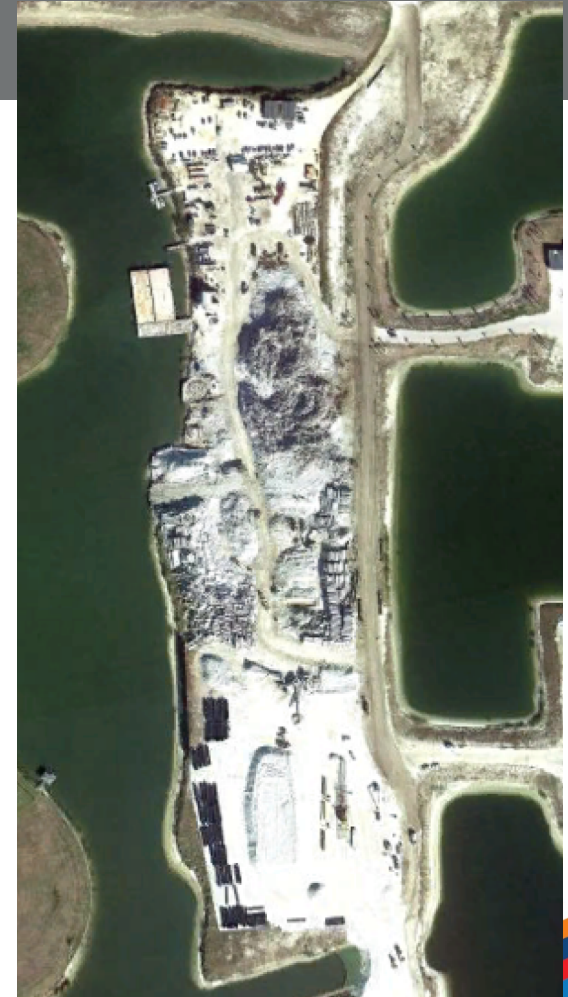
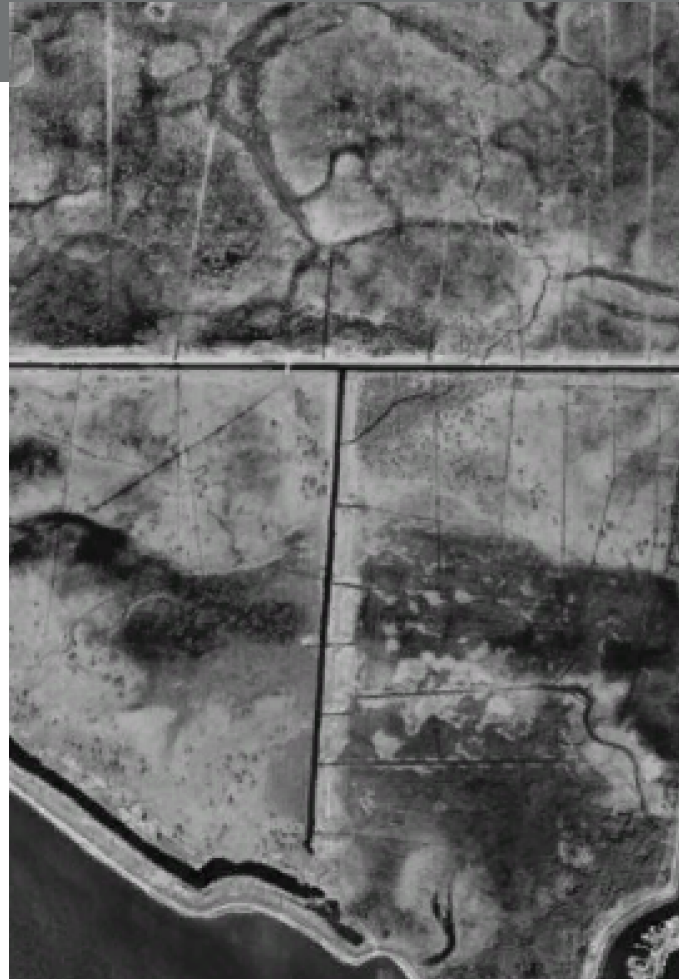
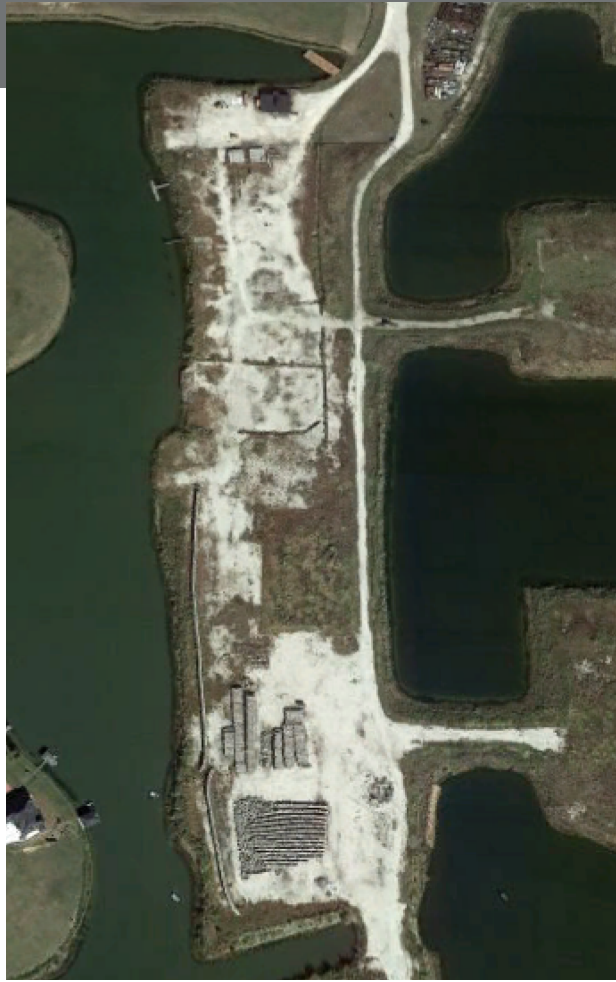
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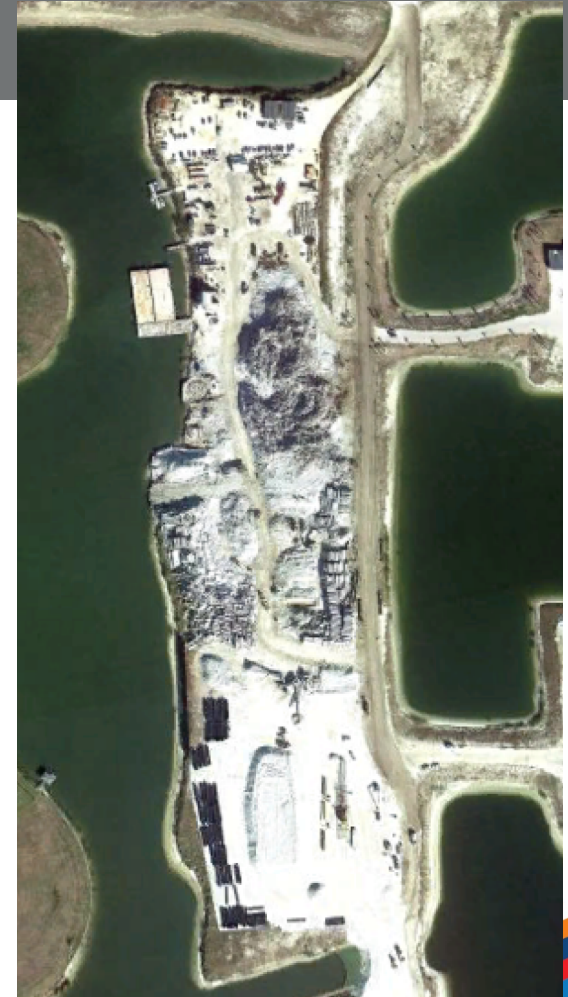
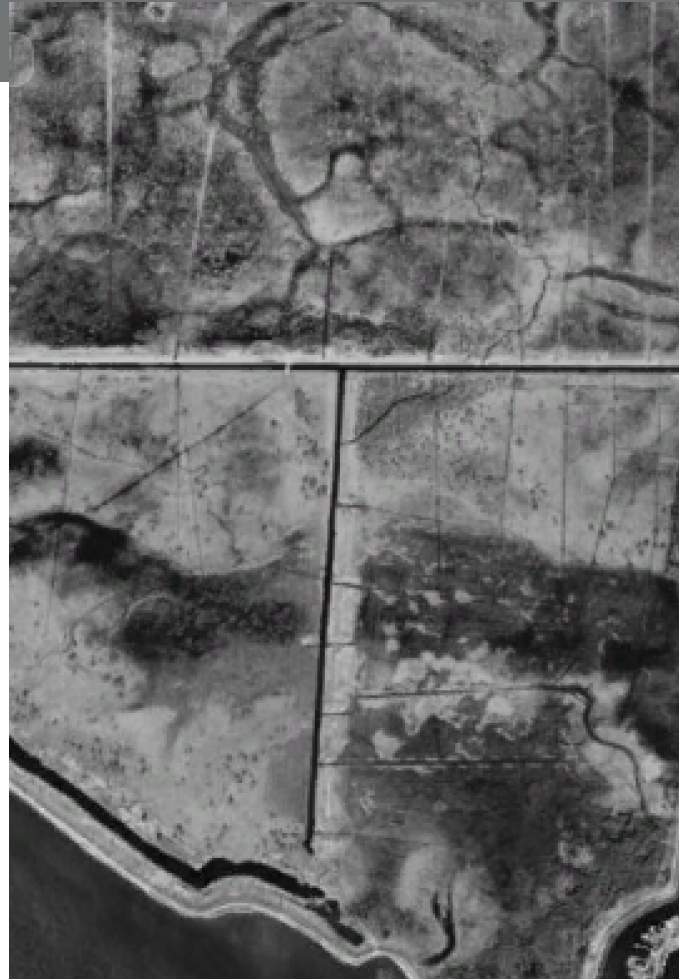
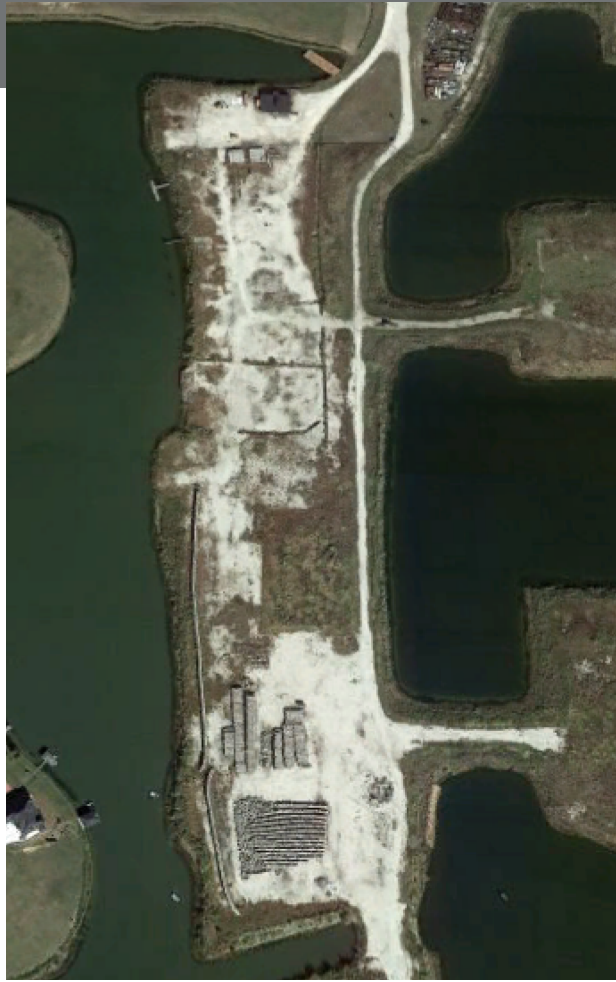
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## The Missing Concrete

- 62,000 tons of concrete “Missing”
- Contractor B responsible for buying concrete to make up the difference
- Contractor B refuses to pay Contractor A
- Suit, Countersuit for damages

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- This entire case was about documentation
  - What it meant
  - How it was construed
  - What was missing

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# Documentation

- Haul Tickets
- Letters/memos/emails documenting critical events
- Meeting Minutes
- Photos/Videos

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## Emails

- Is a phone call more appropriate?
- Email “Can we meet?” with no follow up
- Emails with missing attachments and threads



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# Minutes

- Meeting Minutes
- A documentation of an earlier call or meeting? Don't be lazy and cut the concepts short.



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# Minutes

- Meetings – no documentation
- Missing attachments
- Incomplete thoughts – shortcuts



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# Minutes

- Attendees - Roles and responsibilities
- In depth descriptions missing
- Very High level minutes



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# Truck Haul Tickets

- The process was based on “trust”
- Inadequate records
- No monitoring
- “Tickets” produced days or weeks later

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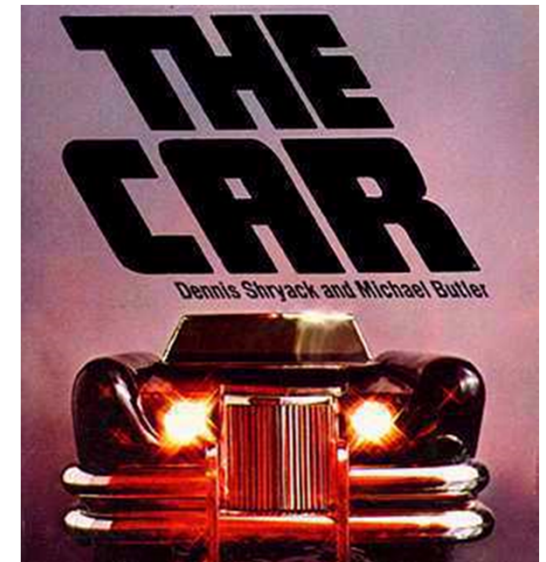






## Word Uses

- The words "a" and "the" mean two very different things when referring to objects.
- "The car drove silently down the road because it is electric."
- In this sentence "the car" refers to a specific car. There is one specific car that is electric and that drove silently down the road.



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## Word Uses

- The words "a" and "the" mean two very different things when referring to objects.
- "A car drove loudly down the road because it had a large gasoline engine."

In this sentence "a car" means any car.  
A non-specific car drove loudly down the road.



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## Word Uses

**A OR AN IMPLIES MULTIPLE SOLUTIONS – SO WHAT WERE THEY?**

A Big Difference between

- The solution.....
- A solution.....

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## Word Uses

### A OR AN IMPLIES MULTIPLE SOLUTIONS – SO WHAT WERE THEY?

Make sure you cover

- The solutions,
- The problems,
- The process,
- How you arrived at conclusions

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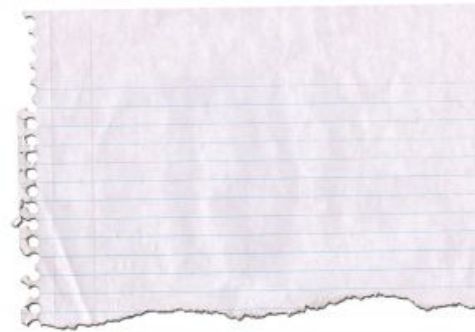


# Scraps of Paper

What do they mean?

Example; Bid noting risk of a specific statement

“Why didn’t you manage this?”

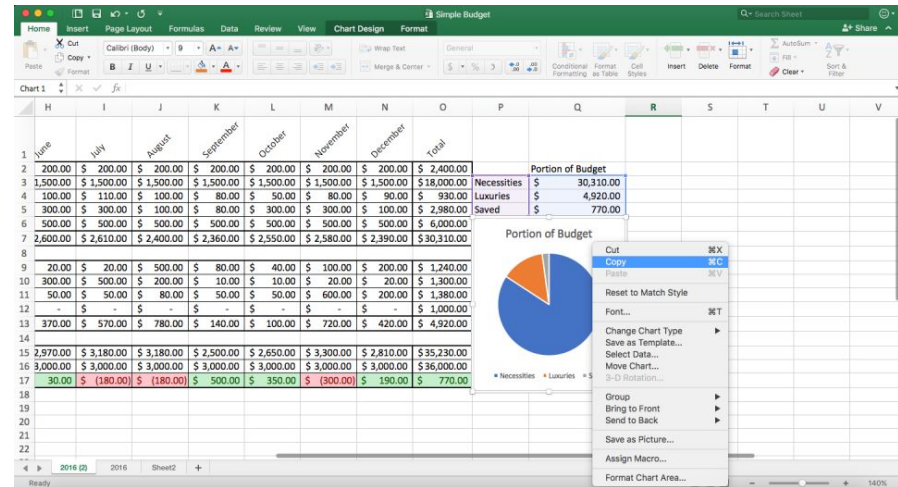


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# Documentation; spreadsheets, analysis, etc

- Who created
- What data used/source
- Date created



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## Closing Thoughts

- Documentation of critical processes was inadequate and based on everyone doing the “right thing”
- Emails with missing information
- Minutes of meetings did not adequately define what was discussed
- Language in emails was dissected – words are important
- DETAILS MATTER

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Thanks for your attention



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