

# ***“50 WAYS TO MAKE YOUR SURVEYS BETTER AND YOUR LIFE EASIER”***

Notes to Accompany Remarks Made on the Subject by

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## **Introductory Remarks and Background**

Some of the materials in these notes and in my talk are not my original statements or thoughts. But some are. Much of these materials have been around for years, published in various magazines. Marketing strategies are still as important as they ever were. Marketing is an important topic, now modified due to changes in our own industry, society, information dissemination and social media. Still, most old marketing ideas remain applicable. How we apply some of them have changed. Most old “tried and true” business practices are just as applicable as they ever were.

This set of notes has evolved over my many years of practice. Their sources are wide and varied. Regrettably I’ve not kept track of some of the quotes given herein. Credit for much of these notes goes to others.

It is likely you know or have heard of most of this talk’s material. Still, we all need reminders and ideas for better surveying business practices.

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## Questions for Each Survey

Who's who here?

What is the purpose of the survey?

Why are you here?

When do you need it?

Ask for the client: How much will it cost?

Who is responsible for the bill?

What are the payment arrangements?

Where does the survey go?

In-house work order form.

## Pricing Surveys for Higher Income

Get off hourly rates and itemized bills.

Use lump sum fees.

You don't need or want to do every survey. Trust your gut.  
Raise your fees. If you do, chances are your competition will follow.

***Remember: "Bad clients and bad jobs go together."***

You're not charging enough if....  
....your clients are not complaining.  
....you're not making enough money.  
....if your rates are the same as everyone else.

***Remember: "If you don't have much work, it's not because  
you charge too much.***

***It's probably because you can't deliver."***

Generate income on everything you do.

Watch collections.

Get retainers.

**Remember: "Surveyors are more trustworthy than their clients."**

**Remember: "When you've been hired for a job, either you work and you hope you get paid or you get paid and the client hopes you work.  
Which is better?"**

Survey companies that have too little work are in that position due to problems unrelated to their price of surveys.  
Our goal: Not just to do a lot of work, but to make a profit.

### Client Relations

Return every phone call or email...quickly.

Deal with every problem when it occurs.  
The older the problem, the harder it is to fix.

Never put off anything. Do it now, not later.

**Remember: "If not now, then when?"**

Anticipate the client's question (billing, progress, completion date) and call them.

**Remember: “Call them before they call you.”**

Be disciplined, which is very difficult.

As the business owner, you are the focal point.  
The way you are perceived  
is the largest influence on your business and its success.

**Remember: “There is always something you can do  
to improve your position.”**

Never offend anyone.

### The Value of Client Communications

What brings most complaints to licensing boards?  
Ineffective or miss-communications, surveyor to client.

Use standard letters (see two attached).

**Remember: “Call them before they call you!”**

Give clients an update, whether they need it or not.

If a client calls you with a question or problem, you’ve already failed.

**Remember: “Procrastination never solved a problem, it only  
made one get worse.”**

It is easier to ignore a problem than fix one.

When you offend someone in a business situation,  
they will tell ten other people.  
Do a good job and they will tell one other person.

Under promise. Over deliver.

We sell a service. Clients rarely know if it is a good survey or a bad survey.  
They do know if it was delivered on time.

Be disciplined in everything you do. Everything on this list  
requires discipline.

### Firm's Image and Public Relations Activities

Be more aggressive in marketing.

Raise your profile in your service area.

***Remember: "People don't contract for services with people  
they don't know."***

Is your firm's image professional?

Write short articles about your projects for Facebook posts, newspapers.

Use letters/email.

Speak to realtor and lawyer groups.

Speak to service clubs.

The PR run.

## Marketing

**Firm needs to sanctify marketing.**

**Recognize it as badly needed.**

**Give it a project number.**

**Form a marketing committee.**

**Must be sustained.**

**Marketing still works.**

**Prioritize marketing efforts against the most likely prospects  
that will turn into projects quickly.**

**The “Odds of Sales Success Scale,” from most to  
least likely:**

- 1.) Existing service to an existing client.  
Take care of existing clients first.  
Never lose a client.**
- 2.) Existing service to a past client.  
Not enough TLC.**
- 3.) New service to an existing client.  
Not uncommon for existing client to not be aware of your  
full range of services.**
- 4.) Existing service to a new client.  
Must put effort into acquiring a new client.**

**Assumptions sure to kill a Marketing Program.**

- 1.) My clients know the services I offer.
- 2.) My referral sources will send me all the new clients I need.
- 3.) When clients have questions, they will call me.
- 4.) It doesn't make any difference if photos appear in marketing materials.
- 5.) The more I interact with people, the more time I waste.
- 6.) Marketing methods don't work as well today as they used to.
- 7.) How a promotional piece looks isn't as important as what it says.
- 8.) Clients don't mind when I'm slow to return phone calls; they understand that I'm busy.

**Talk to your clients.**

- 1.) What can you do to improve service to them?
- 2.) Remind them when you do a good job for them.
- 3.) Give your client a referral.
- 4.) When you don't get the job, ask why.

## Collections

Topic is worthy of a presentation by itself!

Serious collection efforts will require either a valid contract or a signed work order form.

Small claims court.

Mechanic's lien.

Where's your leverage? It went out the door with the plat!

**Remember: "Receivables older than 120 days are no longer receivables."**

- 1.) Be selective who you take on as a client.
- 2.) Have some form of a written agreement.
- 3.) Get retainers.
- 4.) Produce before you bill.
- 5.) Bill on a regular basis, even if nothing is due.
- 6.) Bill on a cycle that's best with the client.
- 7.) Have clear billing statements.

Who's in charge of collections?

Rules for collection calls.



## Why Projects Succeed

Experienced Project Manager.

Goals are attainable and measurable.

A realistic budget and budget oversight.

In our business, high QA/QC.

Communicate and engage the client.

## Why Projects Fail

Scope poorly defined, or, scope creep.

“What we’ve got here is a failure to communicate.”  
The Captain in “Cool Hand Luke”

No one with their eye on the ball.

Not enough resources – people, equipment, money.

Unrealistic expectations.

## Why Small Businesses Fail

### **SBA statistics:**

**20% fail within 1st year**

**50% fail within 5 years**

**33% make it to year 10 and beyond**

**Lack of management/lack of involvement by management.**

**No business plan.**

**Lack of marketing.**

**Misplaced priorities.**

## Claims

- **Most claims against surveyors brought by owner.**
- **Number two is a contractor on the project.**
- **Most common source of claims: Unmet expectations.**
- **If you have \$10,000 deductible and operate at 10% profit, you'll have to do \$100,000 of business to make up for the deductible.**
- **Claims cause:**
  - Losses to your firm.**
  - Lost productivity.**
  - Adversarial relationships.**
  - Damage to reputation.**
- **Do all you can to avoid disputes.**

## **Telephone Skills**

**Place them yourself, return calls promptly.**

**Deliver bad news yourself.**

**Be prepared to leave a message. Likely you'll get voice mail.**

**Avoid long voice mail messages.**

**Be patient. Be prepared to talk a while.**

**Be prepared for the call. Do your homework.**

**Most of our calls are too long.**

**Listen to the person. Mood, background noises. Call back?**

## **Hiring Practices**

**Define the job/project before hiring.**

**Ask correct questions during the interview.**

**Background checks and references.**

**In candidates – look for progression and attitude.**

**Hire for personality. Train for performance.**

## **Running a Meeting**

**Have an agenda (or a stated goal). Provide it to the attendees ahead of the meeting.**

**Have a start time. Have an ending time. Stick to them.**

**Have or appoint someone to take and distribute the meeting notes or minutes.**

**End with a written summary or a list of action items.  
Decisions made, actions to be taken.**

## **The ALTA Survey**

**Seller doesn't want the survey done.**

**Buyer wants it done and trouble is discovered.**

**Title company wants risks discovered and disclosed, but will transfer risks to others, if possible.**

**Everybody wants a professional job (except the seller who doesn't care), nobody wants to pay for it.**

**Work for the buyer.**

## **ALTA Troubles**

**Cemeteries, water boundaries, area and bulk requirements for zoning, utility locates, correct zoning, miss-use by designers.**

## Goals

On time.

On budget.

Keep client informed.

Go beyond surveying to determine client's needs.  
(Provide some lagniappe.)

Treat client as though he/she is your only income source.

Return calls and emails promptly.

Good monumentation.

Attractive plat.

Attractive web site/Facebook page.

## Rules for Business Success

- Integrity: Do the right thing.
- Be financially responsible: Know your income, cash flow, expenses.
- Trust your gut: Hiring, firing, project undertakings.
- Honor your employees: Without your team, you = 0.
- Communicate: With clients, employees.
- Apply technology: Every employee who needs it gets latest phone.
- Thirst for knowledge: Read everything.
- Develop marketing strategy.
- Delegate: You can't do it all.
- Eat well, exercise, don't drink cheap wine.

**Look At Attachments**

**Two estimate letters.**

**Work order form.**

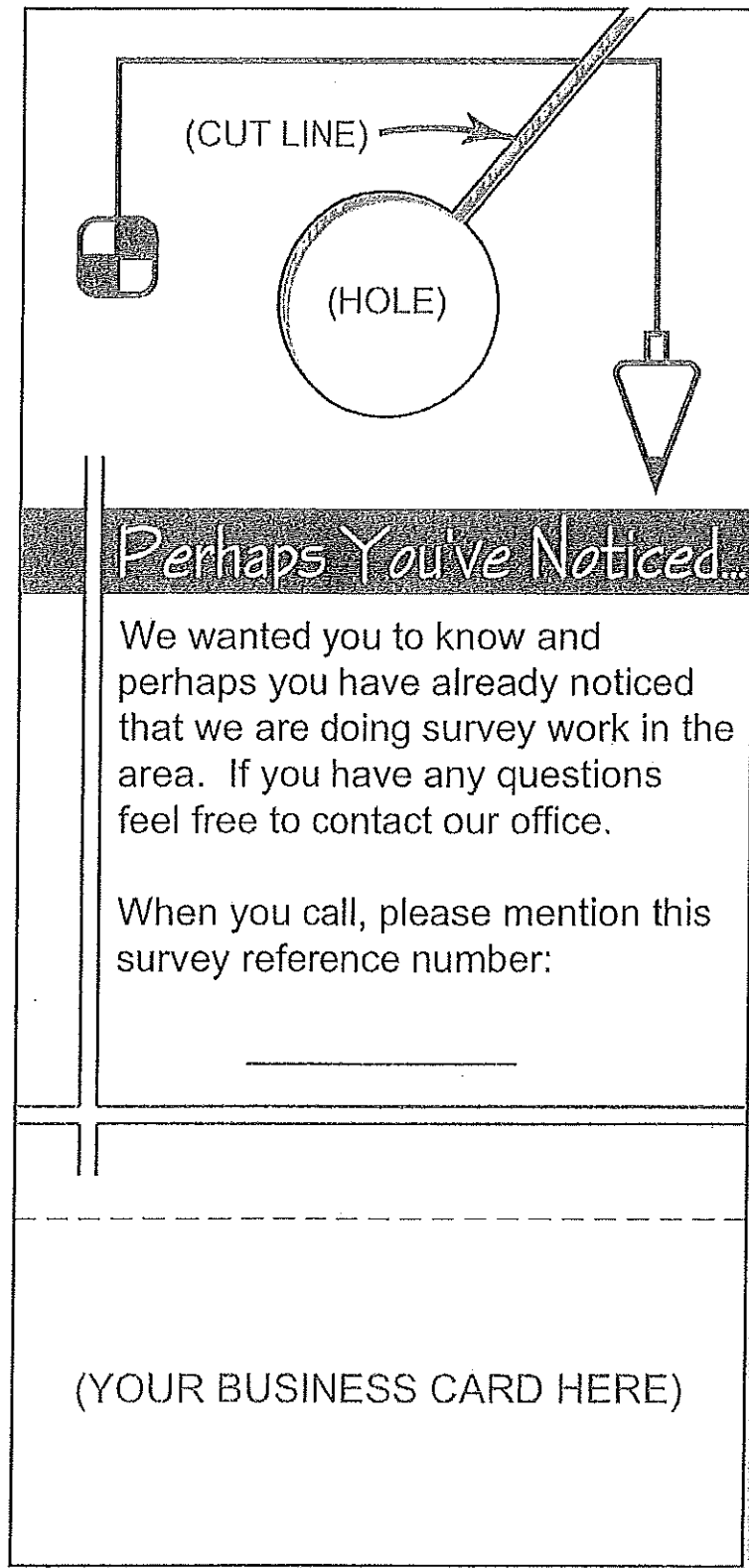
**In-house data form.**

**Phone log form.**

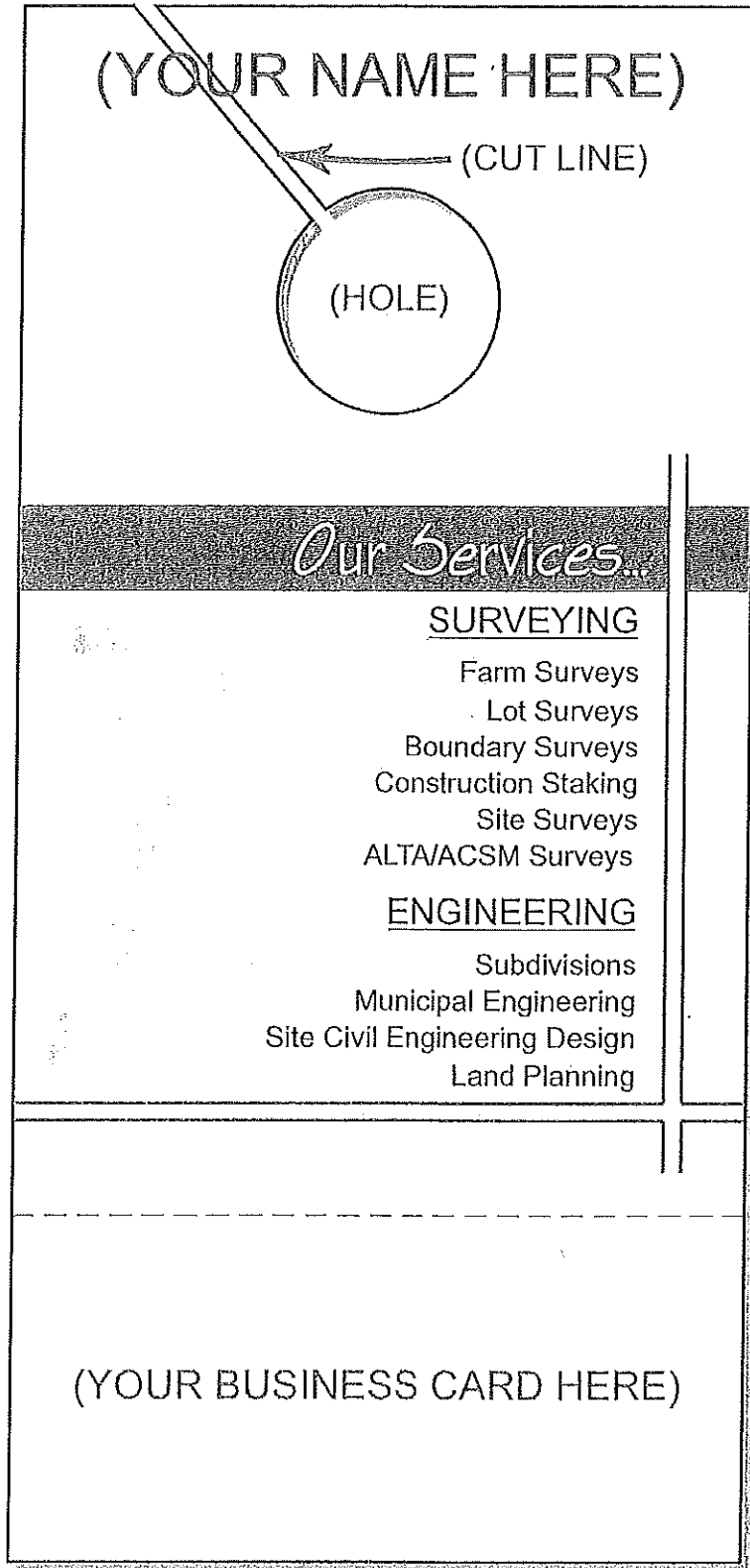
**Surveyor's notes.**

**Twenty Keys to a Successful Surveying Business**

**Aphorisms for the Surveyor**



DOOR HANGER FRONT



DOOR HANGER REAR



## Example Estimate Letter, the Usual Boundary Survey

Thank you for the inquiry into surveying \_\_\_\_\_

I estimate it will cost  \* \* to survey the tract. The wide range in this estimate is necessary because I cannot predict exactly how much survey work may be required to properly establish the tract corners. The survey will meet the current "Minimum Standards for Property Boundary Surveys."

We would set and reference each tract corner, prepare a plat of survey which would show: corners set and found, boundary description of the tract, acreage, encroachments (if any), etc. This estimate does not include marking the true boundary line for fencing, nor does it include showing the record easements or improvements which may affect or be located on the tract. For an additional fee, we could provide these services if you desire.

I would require a retainer of \_\_\_\_\_ paid in advance. We would begin field work within \_\_\_\_\_ working days (weather permitting) of receipt of the retainer.

- \* If this is agreeable, please contact me and we will set a date when someone can meet one of my crews to be shown exactly where the tract is to be located.
- \* As survey costs go, this will be a relatively expensive tract to be surveyed due to a general lack of previous survey work in the area.

Should you have questions, have any special requirements, desire clarifications or modifications, please contact me. Weather permitting and barring some unforeseen circumstance, we should be able to complete the survey within \_\_\_\_\_ business days of notice to proceed. We await your instructions.

- 1.) \* \* Could be fixed price.
- 2.) \* Used on some estimate letters if a new tract is to be surveyed out of a larger parcel.
- 3.) Perhaps add a signature block to be completed by person responsible for paying the bill.

## Example ALTA/NSPS Estimate Letter

Thanks for the inquiry relative to our accomplishing an ALTA/NSPS Land Title Survey on \_\_\_\_\_

\_\_\_\_\_ "ALTA" surveys are a regular part of our business. Of course we use and are familiar with the 2016 ALTA specs. You, as \_\_\_\_\_ for the tract are our client.

We propose to accomplish the ALTA Survey to include "Table A" Items \_\_\_\_\_ These are the usual "Table A" items. Should you or others desire additional (or fewer) items reflected on the survey, let me know. We would provide the certification listed in the ALTA specs. The survey would be certified to the parties you specify. (Please let me know the names of the entities.) We would provide six signed and sealed prints of the plat of survey. (Additional copies will be billed at our usual hourly rates.) Please provide to us the distribution list of entities to whom we should provide the survey.

We consider edits or revisions made after the survey is finished and delivered to be additional services. Other certifications or additional entities to which the survey is to be certified will be considered additional services. For these additional services, additional fees would be charged.

Per the ALTA specs, we will need a current title commitment and readable copies of each referenced document and all adjoining deeds before we can complete the survey. We may start field work prior to receiving the commitment and documents, but we cannot complete the survey without them. Our estimated completion date, assuming we are provided all required documentation, is about \_\_\_\_\_ business days.

Our fee for this ALTA Survey, as proposed, would be \$\_\_\_\_\_. If this proposal is agreeable, please sign below and return to me. On receipt, we will schedule the field work.

If you have a question, desire a clarification or modification, please feel free to contact me.

**Approved, agreed and accepted.  
I am responsible for paying surveyor's fee.**

\_\_\_\_\_  
(signature)

\_\_\_\_\_  
date

\_\_\_\_\_  
(printed name)

\_\_\_\_\_  
(ADDRESS)

\_\_\_\_\_  
(CITY, STATE, ZIP)

## Example Survey Work Order

[Date]

[Name]

[Address]

[Address]

Dear [Name]:

Thank you for your recent request for professional surveying services. We appreciate your consideration and we will endeavor to accomplish the work you require in a timely and efficient manner. Below is a summary of the work we discussed, our estimated fees and delivery dates and the arrangements for payment. Please review the scope of services and if all is agreeable, we ask that you sign a copy of this work order and return it to our office (mail, fax or email would be acceptable).

### AGREED SCOPE OF SERVICES

[Insert the scope of services.]

All work to be accomplished according to the "Minimum Standards for Property Boundary Surveys." Unless included in the scope of services above, the boundaries will not be marked on line.

Ordered by: \_\_\_\_\_ Date: \_\_\_\_\_

Client to be Invoiced: \_\_\_\_\_

Agreed Fee or Fee Range: \_\_\_\_\_ Retainer Required: \_\_\_\_\_

Arrangement for Payment: \_\_\_\_\_

Estimated Completion Date: \_\_\_\_\_

Special Delivery Instructions: \_\_\_\_\_

(Please note: Should some unforeseen issue arise during the course of the survey in regards to the boundary and/or title that requires work outside the original scope of services outlined above, our fee may be higher for this additional work. Should the client decide during the course of the survey they do not wish us to complete the survey, we will bill for any work performed up to the date we are notified by the client to halt our work.)

Approval & Authorization to Proceed:

\_\_\_\_\_  
(Client's Signature)

\_\_\_\_\_  
Date

XYZ Surveying, Inc.:

\_\_\_\_\_  
Professional Surveyor

\_\_\_\_\_  
Date

INTERNAL WORK ORDER FORM

Who ordered survey: \_\_\_\_\_ Date: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

Phone Numbers: \_\_\_\_\_

email: \_\_\_\_\_

Price Quoted: \_\_\_\_\_

Who's Responsible for bill: \_\_\_\_\_

Describe pay arrangements discussed:  
\_\_\_\_\_  
\_\_\_\_\_

Purpose of survey: \_\_\_\_\_  
\_\_\_\_\_

What is delivery date and to whom?  
\_\_\_\_\_  
\_\_\_\_\_

What documents were provided to us?  
\_\_\_\_\_  
\_\_\_\_\_

Any special requirements? Mark line? Spot improvements? Show easements?  
Describe: \_\_\_\_\_  
\_\_\_\_\_

Field Crew Comments or promises made or modifications. If you spoke to  
anyone in the field, list who, and the dates. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Office personnel comments or promises made or modifications, and the dates.  
\_\_\_\_\_

# CONVERSATION MEMO/NOTE TO THE FILES

date: \_\_\_\_\_ time: \_\_\_\_\_  am  
 pm

Telephone

Relates To Survey No.: \_\_\_\_\_

In Office

Conversation With: \_\_\_\_\_

Their Company Is: \_\_\_\_\_

Memo:

Address, Phone No., Fax No., etc.  
of Contact Person.

Phone No.: \_\_\_\_\_

Fax No.: \_\_\_\_\_

email: \_\_\_\_\_

# TOP TWENTY KEYS TO A SUCCESSFUL SURVEYING BUSINESS

- 1 Write a business plan and update it quarterly.
- 2 Do extensive research before starting a new business or making major decisions about the direction of your existing business.
- 3 Be persistent and tenacious. Stick it out when the going gets tough.
- 4 Spend some time each day, 20%, on marketing your business.
- 5 Come out of the Dinosaur Age and computerize your records, bookkeeping and client files.
- 6 Take care of yourself. Eat properly, exercise regularly. Take vacations.
- 7 Identify your "A" clients, those people who account for your profitability (not just big sources of revenue that are making more trouble than they're worth). Then pamper them.
- 8 Involve employees in solving company problems and suggesting new ways of doing tasks, getting clients, meeting deadlines, etc.
- 9 Continually improve communication skills with employees, clients, suppliers. Nothing can kill your business faster than misunderstandings.
- 10 Review your business and insurance coverage annually and adjust coverage to match changing needs. To cut costs, but willing to accept a higher deductible or go with a preferred-provider organization.
- 11 Learn networking techniques and use them every day everywhere. This decade is known as the "Networking 90s" because people do business with people they know.
- 12 Survey your clients on an ongoing basis to find out how well you are satisfying their needs, representing the company and correcting problems. Ask former clients why they left; they will shine the light needed on changes.
- 13 Treat employees the way you want to be treated. Give them tools to do their best work. Stay out of their way. Remain flexible to their needs and reward good work.
- 14 Don't try to be all things to all people. Small firms can't compete with the giants by duplicating everything they do. Find the niche that you can do better than the big guys and hone that advantage.
- 15 Control costs for everything from paper clips to works compensation insurance.
- 16 Add value to your services. Always give more than expected.
- 17 Get several quotes for major purchases. It will keep existing suppliers on their toes and may turn up significant cost savings to your firm.
- 18 Develop professional relationships, also called strategic partnerships, with other firms. You can be team members on bigger projects, refer business to each other and help each other in emergencies or when the workload gets too heavy.
- 19 Seek professional help. CPAs, attorneys, consultants, professional organizations and government agencies are just a few sources of meaningful help.
- 20 Be sure to laugh each day.

# Aphorisms for the Surveyor

As-published in "American Surveyor," 2010 Vol. 7 No. 5

Dr. Richard L. Elgin, LS, PE

For many years to state surveyor association meetings I have delivered a seminar on how to improve one's surveying business. Its current revision is based on my 38 years of education, training, experience, buying then operating and growing then selling a surveying and engineering business, and all the accompanying highs and lows that go with a career in surveying. Also during those 36 years I have collected sayings I thought were applicable to operating a surveying/engineering business. These aphorisms are in my seminar handouts (as are many other nuggets) and I thought perhaps your readers would enjoy them as well.

My only regret is that I did not keep track of the source of some of these sayings. Some I've heard for years, yelled across our surveying office by my late father (with great emphasis and effect). Others I've read or heard and modified. Others I'm sure are quotes attributable to someone, but I don't know which ones or to whom. To them the readers and I say thanks for your insight and wisdom. Enjoy and apply.

- Call them before they call you.
- Under promise. Over deliver.
- Procrastination never solved a problem, it only made one get worse.
- You never get a second chance to make a first impression.
- People don't contract for services with people they don't know.
- Bad clients and bad projects go together.
- Surveyors are more trustworthy than their clients .
- If you don't have much work, it's not because you charge too much.

- Receivables older than 120 days are no longer receivables.
- If you don't have time to do it right when will you have time to do it over.
- The surveyor's measurements don't end up as complaints to the licensing Board. Miss-communications or lack of communication with the client do.
- When you offend someone in business they will tell ten people. Do a good job they will tell one.
- Never lose an existing client.
- There are good jobs and there are bad jobs. Trust your gut. Don't do the bad jobs.
- I don't know of a surveying company that failed due to charging too much.
- An organization's morale flows from the top down.
- Character is what you are. Reputation is merely what others think you are.
- It's what you learn after knowing it all that counts.
- A leader leads by example whether he knows it or not.
- Leadership is action, not position.
- Don't meet problems as they come, anticipate them.
- Don't worry about the project you don't get, worry about the ones you do get.

Excellent words by which to operate a surveying business (and, live life).