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~~IT'S TIME WE STOPPED GIVING OUT ESTIMATES OVER THE TELEPHONE.~~

For several months now we are becoming more aware of the imprudent actions of some of our members who are jeopardizing the public relations image that we are trying so hard to foster.

It appears that some firms are willing to indicate the professional fee they will charge for a survey which they have not researched. Further some surveyors do not record or log the calls for estimates. Clients telephone surveyors after a survey has been done to enquire what the surveyor would charge. They of course do not state that the survey has already been completed.

The time has come to adopt good business habits. We should perhaps adopt the practice carried out in the lawyer's office. The client should be asked to attend at your office with his deed and discuss the cost of the survey. You should be given the opportunity to do some research before undertaking the preparation of an estimate on larger jobs, the cost of this research should be billed to the client if he wants you to prepare an estimate only, without giving you the actual work.

Two instances of this practice were recently reported:

(a) a surveyor charged \$2,500 to undertake a reference plan where difficult field conditions prevailed in a rural area. Another surveyor, when called by the lawyer indicated that he would do the survey for \$1,000, not knowing of course that the survey had already been undertaken. He did not research to determine that a substantial portion of the property was swamp. The area of the property was also much larger than quoted by the lawyer.

(b) the other instance relates to a plan of survey undertaken in Metro Toronto where the client was billed \$1,125., although it is apparent from the records that the professional fees should have been higher. Three surveyors were subsequently called and their secretaries or draftsmen quoted prices ranging from \$450 to \$650 to do the whole job. These quotes were also given without any research or discussion with the O.L.S. in charge.

The Fee surveys undertaken indicate the suggested fee for minimum time necessary in performing a survey. This probably only relates to a small proportion of your surveys.

Let's start acting in a businesslike and professional manner. An estimate without research or discussion with the client is an estimate that only encourages the proliferation of telephone complaints and does not benefit anyone. Let's start by asking the clients to attend in the office and bring their papers before an estimate is given. If they do not wish to attend, have the papers delivered to your office. (With the variety of mail and courier services available today, there is no reason why this cannot be undertaken.)

Most important, log the specifics of the call and then have an O.L.S. return the call to quote an estimate after the research is completed. If you do not maintain a daily log, start one today and remember to include your estimates.

Lorraine Petzold, O.L.S.
Standards Officer