



IAQ RADIO+

Show Number: 759 Blog

Jon Isaacson Project Management 2025

Good day and welcome to IAQ Radio+ episode 759 blog. This week we welcomed back Jon Isaacson, the Intentional Restorer to discuss Project Management an issue that cuts across disciplines.

Jon Isaacson, “The Intentional Restorer,” is a contractor, author, educator, and host of The DYOJO Podcast. The goal of The DYOJO is to help contractors shorten their DANG learning curve.

Nuggets mined from today’s episode:

What the Intentional Restorer is thinking?

One of the things that keeps circling around in my mind as it relates to project management, and our industry in general, is the emphasis on innovation. Innovation is good, but it does not solve the lack of foundation or fundamental processes. For example, people talk a lot about SOP’s standard operating procedures, but they often do this before they actually process their standard operations. They create this beautiful thing on paper or purchase a CRM program before they ever work through the kinks that might make the process great. Often, it’s the process of creating the process that brings the team together and reveals the things that matter most.

One of the things that came out of my last couple of presentations for project management is just how important the basics are. How many organizations are distracted by symptoms of the issue rather getting into the core issues. For project management, these presentations revealed how important it is to have a clear understanding of the scope of work that has been contracted. Then clear communication between the customer, the estimator, and the project management team with regards to the timeline. Also, a realistic budget from that scope and timeline.

While scope, timeline, and budget are the key components of project management. There are three components that really make a project succeed or fail - the process, the people, and the project.

The interview focused on discussing project management innovations, particularly in the context of the restoration industry. John Isaacson, a contractor and author, shared insights on using AI tools like ChatGPT and Grok to improve email communication, create marketing content, and summarize scopes of work. He emphasized the importance of focusing on what won't change in the next 10 years, as advised by Jeff Bezos, to better structure businesses. The discussion also touched on the potential of AI in simplifying repetitive tasks and allowing professionals to focus on higher-value activities.

Enhancing Project Management Effectiveness

Jon discussed standard operating procedures (SOPs) and customer relationship management (CRM) systems in project management. He emphasized that implementing new technologies or procedures without proper planning and team input can often worsen problems rather than solve them. Jon highlighted the need for regular team meetings to discuss ongoing projects, lessons learned, and to foster a culture of open communication where blame is not assigned but rather used as a learning opportunity. Cliff suggested that performance-based standards could be more effective than prescriptive ones, allowing companies to tailor procedures to their specific needs and strengths. They also discussed the potential of AI in improving communication and streamlining processes, though Jon noted that AI's effectiveness depends on how questions are framed.

Understanding Client Insurance Expectations

Jon discussed the importance of understanding client expectations and managing insurance-related issues, emphasizing the need for contractors to focus on their scope of work rather than acting as policy experts. He recommended reading the full policy and knowing the scope of work to avoid misunderstandings and unnecessary frustration. Cliff shared his experience with restoration business insurance policies and suggested writing down what the business does and then requesting your brokers to respond in writing to ensure clarity on coverage. Both Jon and Cliff agreed

on the importance of knowing the scope of work for project managers and contractors.

AI's Impact on Restoration Industry

Pete discussed the impact of AI on the restoration industry, highlighting concerns about job displacement, particularly affecting white-collar workers like estimators. He referenced an article in C&R Magazine that criticized the dilution of job titles and called for a return to basic industry practices. Pete and Cliff agreed that while the industry has become more standardized and less creative, restoring the autonomy of lead technicians and implementing a collaborative problem-solving approach could improve efficiency.

Restoration Training and Project Focus

Pete shared a historical case study about Bill Bonds, where a jury awarded damages in a claim of bodily injury on a water damage claim while absolving co-defendant chemical manufacturers of responsibility, highlighting the importance of proper training in the industry. The discussion then moved to Jon's concepts about letting the structure speak and the restoration triangle (client, restorer, and adjuster), with Pete emphasizing the need to focus on project needs rather than customer desires.

Some Key Takeaways:

- Restoration industry leaders to explore ways to balance traditional project management skills with new technologies and AI applications.
- Restoration companies to reassess their training programs to ensure proper qualification of field technicians and project managers.
- Project managers to focus on clearly understanding and communicating project scopes to prevent misunderstandings and disputes.
- Restoration industry to consider ways to regain some control over project decisions while working within current industry constraints.

Z- Man's Notes

- Jon called attention to a Jeff Bezos comment: "When I'm talking with people outside the company, there's a question that comes up very commonly: **"What's going to change in the next five to ten years?"** But I very

rarely get asked “What’s not going to change in the next five to ten years?” It helps to base your strategy on things that won’t change.”

- The importance of concentrating on what customers want.
- The annual volume of most restoration firms in the U.S. is \$5 million or under. AI can be used by these firms for polishing written communications with clients and insurance adjusters, writing blogs, making scope and estimate more understandable. Jon uses Chat GPT and Grok. The key to successfully using AI is to create effective information requests: make this email less angry, make this email more professional, make this memo more personal, create a 600-word blog about _____, create a story format about a fire damaged kitchen restoration where countertops were replaced and cabinetry and flooring was successfully restored, etc. AI is useful in taking data from the field and sharing it in real time.
- AI is useful in program work, where data can be entered into the system and filtered into other platforms.
- Radio Joe commented that after writing a letter, rather than mailing it in haste, Abe Lincoln would keep the letter in his desk overnight.
- Be aware that purchased “plug and play” CRM and SOP solutions may be challenging to implement. CRM and SOP with prescriptive sequencing may create roadblocks which will be frustrating to staff to bypass and use in the field.
- An example of innovation going backwards. Approximately 15 years ago when Jon was working for a large national restoration firm, the firm invested in a new software program that was touted to improve efficiency on pack-outs. Fire/water damaged jobsites often had insufficient internet band width, the system often wouldn’t upload photos, etc. A manual pen and paper system and a single mom to whom the information was uploaded for placement in excel spread sheets worked more effectively.
- Mechanization and robotic automation is more suited to a McDonald’s restaurant than to disaster restoration projects.
- Jon was once hired to manage a division of a large restoration firm and was responsible for employee training. When Jon’s supervisor walked into a scheduled 1-hour training meeting; the supervisor called Jon aside and told him when 8 people are in a training meeting the company is losing \$.
- The tendency to finger point and try to cover your butt by blaming others.
- Communication is not what you think you said, it’s about what they heard.

- Restorers should be careful not to interpret insurance coverage without an insurance adjusting license.
- When developing scope of work and estimates, “Let the structure speak.” What is needed to return the structure to pre-loss condition?
- Project managers must know the scope inside and out to be effective.
- Project managers become ineffective when trying to handle too many projects. While well experienced, long-term employees or subcontractors may not have the skills necessary to be good project managers.
- Estimating is data entry, gathering data from the field and transferring the data.
- Managing client expectations “your insurance will only pay to replace what you had; you have the option to upgrade at your own expense.”
- What is the restorer contracted to do, what is in the scope? Is it a legitimate Supplement due to a discovery or is a *Change Order*. Jon recommends: When Words Collide: Resolving Insurance Coverage and Claims Disputes, <https://www.amazon.com/When-Words-Collide-Resolving-Insurance/dp/1986596923>

RoundUp:

Pete Consigli, Global Restoration Watchdog and Disaster Restoration Historian

- Pete often approaches his role in IAQradio roundups from the perspective of a historian.
- In the news, Pittsburgh, PA known as the “steel city” may soon be known as the AI city. <https://www.alleghenyfront.org/trump-pittsburgh-ai-pennsylvania-cmu-natural-gas/> Mike Rowe attended the event and said that AI initial focused will be on white collar jobs not blue-collar jobs.
- “Fast forward to 2025. Let’s be blunt: titles have become watered down. The industry is flooded with “Project Managers” who have never managed a budget, “Estimators” who don’t know a truss from a T-bar, and “Technicians” who are little more than equipment movers.” <https://www.candrmagazine.com/undeserved-job-titles-are-killing-restoration-and-its-time-to-fix-it/>
- Pete penned an article in the mid 1990’s in CleanFax magazine “The lead technician is the heart and soul of a restoration company”. The lead technician ran the project from cradle to grave. The National Association of

the Remodeling Industry (NARI <https://www.nari.org/> published a similar article on the importance of the lead carpenter.

Z-Man commented that in the old days, restoration was performance based, and the restorer had options and called the shots. The goal was to reduce overall claims costs by restoring rather than replacing. Those days are over. Due to the combination of replacement cost insurance policies, prescriptive based industry standards, insurance carriers who wanted claims data, there is now little to no differentiation between services offered by restoration firms. It's all about price.

Back to Pete Consigli

- Get away from finger pointing. Jim Collins, in Good to Great, discusses the autopsy without blame. In Japan, a common work philosophy is we fail, or we succeed. In the U.S. it's I fail, or I succeed.
- Jim Collin's 3 circles, the hedgehog concept. "A simple, crystalline concept that flows from deep understanding about the intersection of three circles: 1) what you are deeply passionate about, 2) what you can be the best in the world at, and 3) what best drives your economic or resource engine."
- Stephen Covey's 5th Habit: Seek First to Understand, Then To Be Understood is based on the principle of respect and is about listening emphatically before we speak or respond in a conversation.

Jon Isaacson's Final Words:

The conversation concluded with John expressing appreciation for the show's educational content and promoting his books through his website doyojo.com.

Z-Man signing off

Trivia Question: Name the American engineer best known for his development of scientific management and creation of a chart employed on major infrastructure projects including the Hoover Dam which continue to be an important tool in project management and program management?

Answer: Henry Gantt