

# exTracker

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FIVE SECRETS TO GET  
**CHANGE ORDER REQUESTS**  
APPROVED FASTER

# If you want to get your Change Order Requests (CORs) approved faster, make it easier for your customer to work with you!

Take a minute to evaluate how you handle your COR process using these five secrets:

## 1 | CLARITY

Be clear, be concise.

Your customers have to sift through hundreds of emails a day. That means quick, easy-to-answer messages will always grab a customer's time and attention. It's one item they can check off their never-ending to-do list. Make concise, focused emails a best practice. Keep your subject lines clear, direct and brief. Short subject lines stand out in cluttered inboxes; every word should make it simple for a customer to notice and search for your Change Order Request.

Follow the same guidelines with your email content. Each email should address one clear-cut topic: the info or action you're requesting. No need for information overload; state the facts and your reason why it needs to be completed - in as few words as possible. To get what you need in a short amount of time, the goal of your email content should be to minimize distractions and keep your customer focused.



**Take a second to ask yourself: How can I make my communication more succinct and more effective so my team can accomplish more, in less time? Remember this equation: less customer effort = faster customer action.**

# 2

## QUALITY

Everything you submit to your customer represents the quality of your work.

When asking for a Change Order, make it clear you've earned it.

Here are three straightforward tips:

- 1 Start with your handwriting. Make sure every Time & Materials tag is as easy to read as possible. That means your paperwork shouldn't look like you're still in 3rd grade. Blaming your field personnel is not a valid excuse! Gain greater respect from your customers and a higher priority for your CORs.
- 2 Include photos that make it simple for customers to understand what your T&M is for and why it's absolutely necessary. Decrease the amount of time and research your customer has to spend on your COR and you'll increase the speed it takes to get your COR approved.
- 3 When you send a scanned PDF, make sure the quality of the image represents the quality of your company. Sloppy documentation might save a few minutes of your time up front, but it can be tough for customers to decipher what you need, which means your requests get pushed to the side. If you're experiencing delays in payments, take a minute to review how you're submitting your requests.



**Are you slowing down your projects and frustrating your customers with unprofessional documentation?**

# 3

## TIME

Respect your deadlines.

We've all been there: heavy workloads that lead to missed deadlines. There's no doubt you're working hard, but let's face it...when your Change Order is late it becomes harder for a customer to remember what your COR is about, and that can hold up the approval process.

The bottom line is, it's typically inefficient processes and poor tracking that create delays in your COR deadlines. So, if you're always racing against the clock with your CORs, maybe it's time to take a look at your Change Order process.



**If you are late submitting your CORs, why should your customer be on time getting them approved and paid?**

# 4

## ORGANIZATION

Keep your COR logs up to date.

Poorly organized COR logs can hurt your customer relationships. If your Change Order Request log is incorrect, unclear, or out of date, it makes your change order requests difficult to deal with, and it can even create an unnecessary loss in revenue for you or your customer. Never forget that this log is the most critical change order document you will send your customer. These logs confirm they have received and processed all of the change orders you submitted.

Remember, Change Order Requests represent very little upside in profit to your customer, but entail a huge amount of risk. To get what you need, when you need it, make it simple for a customer to see what has to be done to keep your team (and the project) moving forward.



**How can you make it easier for your customers to sort, review, and stay on top of your COR log?**

# 5

## COMMUNICATION

Differentiate your company from your competitors.

Keep in mind that while they're speaking with you, your customer is in the middle of dozens of discussions with other subs. If you streamline your COR processes, the efficiency and clarity you provide will separate your company from the competition. Respond to customers promptly and you'll give them more reasons to stay focused on what you want: reviewing and approving your Change Order Requests ASAP.



Take a look at a few of your recent emails or handwritten notes you've sent to customers. How can you streamline and simplify your message in order to ensure your objectives become a higher priority with your customers?

**When your Change Order Request process is clear, concise, easy to understand and professionally done, your company will stand out from the crowd. Your customers will be happier to work with you, your life will be less stressful, and your company will get paid sooner rather than later.**

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Extracker was designed to be an all-in-one, simple solution to streamline and successfully manage Change Order Requests. Extracker is free to sign up and takes less than five minutes to get started down a path to Change Order success.

# extracker

To learn more, visit our website at [extracker.com](http://extracker.com)  
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