

Filename: TC Visit Matrix

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Excerpt: “Structuring your visits from that first call can help you and your builder navigate the sometimes complex landscape of what to work on, what questions to ask, and in what order to approach topics.”

Copy: Do you remember the first string of technical counselor visits you made? On the drive or flight there, were you thinking about what you would find? Did you wonder about how receptive the builder would be to your suggestions? While most first visits go really well, you might have encountered a few that were difficult.

Structuring your visits from that first call can help you and your builder navigate the sometimes complex landscape of what to work on, what questions to ask, and in what order to approach topics.

Here’s a checklist matrix to help you schedule and cover all of the things that will help you make the most out of your time. Many of the topics are self-explanatory, but I will focus on what I consider to be the most important in this series of short articles.

**Expectations.** This is important and should be discussed up front. If you’re not both on the same page here, the visits will be less effective. What does the builder expect from you? Listen carefully. What do you expect from the builder? How many visits will you make?

**Planning and Goal Setting.** Most builders launch into the kit with great excitement and enthusiasm. When I ask to see their timetable, they look at me quizzically.

Help your builder develop a rough schedule. Tell him/her that it’s not cast in stone and they can change it. How you set this up now will make a big difference in whether the project gets completed. Chunk the steps down into small pieces that will deliver satisfaction when completed. Then the builder can apply the same techniques to the rest of the project as they go.

**Human Factors.** Here you should talk about how the builder will involve his or her family in the project if they have this dynamic. Many a project has been abandoned because this was overlooked.

**Safety.** The first visit should include a discussion of safety practices, so the builder gets in the habit of doing things smartly and safely right off the bat.

**Training and Hands-on Experience.** Most new builders need training in building practices. Try to assess this on the first visit. The builder may need more training than you can provide. If this is the case, help them identify the resources they will need and add the time to the schedule. If they are a self-starter, then the EAA webinars and books are a terrific place to begin.

**Planned Alterations or Upgrades.** Find out if the builder plans to deviate from the kit. Help them understand how to consult with the kit manufacturer and how to document what they are doing.

**Start the Builder's Log.** Help the builder understand the need for a builder's log and how to get it started. Explain the resources that the EAA has to offer.

In coming articles, I'll expand on these topics and offer tips for effectiveness.