

GETTING SPECIFIED, a White Paper for Building Product Manufacturers

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Abstract: Getting specified via BSD SpecLink-E is an excellent value. For less than the cost of a single full-page magazine ad, you can put your company's name in front of design professionals writing specs for real projects. They see your advertising message at the time they are deciding which manufacturers to list in their specs. They can jump directly to your web site from within the SpecLink-E software. You can get report showing who was listed and in how many projects. You could be finding out how which projects SpecLink-E design professionals have written specs for and who they listed in their specs.

How does this work? First let's explore the construction products supply chain. Contractors and builders buy materials and equipment for installation into construction projects from suppliers and distributors, or direct from the manufacturers. In some cases, the contractor/builder makes the purchase decision based solely on his own needs (cost, availability, suitability, etc.). But in most commercial, industrial, and institutional construction (other than single family homes), someone else also has input into the purchase decision – the design professional – an architect, consulting engineer, interior designer, landscape architect, etc. The reason for this is simple – the design professional is hired by the project's owner to prepare the construction documents for the project. The construction documents are drawings and specifications that tell the contractor what to build, where to build it, and what to build it out of. The owner always wants the best value, so he tells the design professional (if he/she doesn't already know it!) that the construction documents should be specific about the quality required and ensure that the contractor can get competitive pricing from suppliers. This simple fact is why specifications are written.

If your company's products are specified in the design professional's specs one of the contractor's options is to buy your product. If your company's name is listed in the specs the contractor knows that the design professional will not reject your product if he buys it, provided you furnish a product that meets the details of the spec. If the contractor is not familiar with your products, your company name listing in the spec is instant advertising. If the design professional chooses not to list manufacturers, you don't get specified unless the specs describe the type of product you make in detail. In many cases, design professionals use both a detailed description and manufacturer name listings to establish the quality required.

Actual project specifications vary enormously:

- The type of contract, such as design-bid-build, design-build, or cost-plus, affects what the specs say about permitted substitutions, product alternatives, and acceptable manufacturers.
- The design professional's experience and knowledge of the likely contractor bidders affects the level of detail and degree of control the specs exert over the purchasing process.
- The owner's preferences govern which types of products are specified and which manufacturers would be acceptable (or not).
- Government agency owners often insist that any product that meets the specification requirements be accepted, regardless of whether the manufacturer was listed in the spec or not – this makes the details of the specs critical and manufacturer lists are "for information only."
- The type of product, how many manufacturers make it, and what kinds of alternatives are available affect whether manufacturers are listed and whether detailed product characteristics must be specified – for instance, manufacturers are often not listed for commodity products that can be adequately specified by description.

Methods of Specifying

Faced with this variety, we can nevertheless describe a small number of categories of specs – methods of specifying – characterized by their approach to product specification and the listing of manufacturer names:

- **Brand Name Listing:** This is a spec where the required product is listed by manufacturer and model number or brand name. The brand name must be sufficient information to purchase the product. This is the simplest spec for a design professional to write, because it is short, but can

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be time-consuming in several ways. To get competitive pricing, at least 3 brand name products that are considered equal may be listed – the design professional has to do more research to find equivalent acceptable products. The more common approach is to state that acceptable equivalents may be used ("or equal") – the contractor has to do the research (he usually gets suppliers to propose alternatives). Then, the design professional will spend time reviewing and approving/disapproving the contractor's proposed substitutions. Where competitive pricing is critical (such as when a large quantity is involved or the total cost is high), the design professional is unlikely to use this method except for products that he uses often and has already thoroughly researched.

- **Product Description:** This is a spec that describes all the important characteristics of the product, without referring to manufacturer names or brand names. It is sometimes referred to as a "generic" spec, in the sense that it is non-proprietary, but it's not necessarily "plain label" or low quality. There are two major categories of products commonly specified by description:
 - **Products With Accepted Industry Standards:** There are accepted industry standards for many commodity products. Examples of commodity products are gypsum board, lumber, concrete, structural steel, plumbing piping, and electrical conduit. For instance, the quality of gypsum board can be stated by requiring that it meet ASTM C 1396. There are many standards for non-commodity products as well, although they usually describe the quality less comprehensively than for commodity products. In either case, product characteristics that are not covered by the standard must be described in sufficient detail to identify the product and quality required. This type of spec is relatively easy to write and enforce – the existence of the industry standard means that the manufacturers and suppliers understand what is wanted well enough that the likelihood of mistakes (or cheating) is reduced.
 - **Products Without Accepted Industry Standards:** These products must be described to whatever level of detail is necessary to identify the product and quality required AND to preclude the possibility that an unacceptable product could meet the specification. The design professional usually chooses a product as the "basis of design", compares its characteristics to those of other similar products, and makes a list of acceptable characteristics. This research is so time-consuming that once it is done, that product and its characteristics are specified on many (or most) future projects – once the desirable product characteristics are determined, only different project circumstances are likely to change them. The enforcement of a descriptive specification is easier than a brand name spec – evaluation of the proposed substitution is easier since all the original requirements are listed in the spec and don't have to be looked up in a catalog.
- **Manufacturer Name Listings:** The listing of a manufacturer's name in a spec is never an adequate specification, unless that company only makes one product of the type named. For instance, for gypsum board, stating that gypsum board is to be made by Manufacturer XYZ, without any description, is likely to be an inadequate spec, because XYZ probably makes several types of gypsum board of different quality and cost. So, manufacturer name listings are almost always combined with a descriptive spec (as described above) – and the specification says something like: "provide products complying with these descriptive requirements and made by one of the manufacturers listed." For commodity products and products with well-established industry standards, neither public nor private sector specs are likely to list any manufacturers' names – mostly because there are so many manufacturers who would be acceptable. Whether the manufacturers listed are the only ones that would be acceptable is determined by the design professional based on the type of product, the use the product is put to, the quantity needed, and the contract type. "No substitutions allowed" is very common in the private sector, because that minimizes the time the design professional must spend reviewing proposed substitutions. In the public sector, "no substitutions" is very rare and manufacturer name listings are for information only.

How do these methods relate to proprietary specs? Proprietary specs are specs written to describe a particular manufacturer's products, either by description or by brand name, or both. Descriptive proprietary specs are favored by manufacturers because they describe features of their products that cannot be achieved by other manufacturers. In that sense, proprietary means "sole source." Frankly,

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proprietary specs are NOT favored by design professionals. Given a choice between a well-written non-proprietary spec and a well-written proprietary spec, the average design professional will choose the non-proprietary one more often. Some design professionals distrust proprietary specs so much they will [emphatically] not use them at all – they are afraid of being tricked into specifying sole-source, forgoing competitive pricing. Proprietary specs are used mostly by specifiers who have no other source material available and are often significantly modified. A design professional could not assemble an adequate office master just from proprietary specs – there are too many commodity products that manufacturers do not offer specs for.

Pros and Cons of Different Methods of Specifying

The above explanation gives some reasons why a design professional might prefer one specifying method over another. We can also rate these specification options as to desirability by manufacturers and by their frequency of occurrence in project specifications.

	Specifying Methods											
	One Brand Name, No Description		Several Brand Names, No Description		Descriptive Spec Without Mfr Names	Descriptive Spec with One Mfr Name Listed		Descriptive Spec With Multiple Mfr Names		Proprietary Descriptive Spec With Mfr Listed		
Substitutions Allowed?	No	Yes	No	Yes	Yes	No	Yes	No	Yes	No	Yes	
Listed Mfr's Point-of-View	Very good	Not as good	OK	Not as good	N/A	Good ¹	Not as good	OK ¹	Not as good	Best	Not as good	
Unlisted Mfrs' Point-of-View	Bad	Better	Bad	Better	Good	Bad	Better ¹	Bad	Better ¹	Bad	Better ¹	
Competitive Pricing?	No	Yes	Yes	Yes	Yes ⁷	No	Yes	Yes	Yes	Yes	Maybe	
Design Prof's Research Effort	Low	Low	Medium	Medium	High ²	High ²	High ²	High ²	High ²	Low ⁶	Low ⁶	
Design Prof's Enforcement Effort	Easy	More work ³	Easy	More work ³	High	Easy	More work ³	Medium	More work ³	Low	Medium	
Preferred by Design Profs ⁴	Not much	Low	Low	Low	Medium ⁵	Low	High	High	Very high	Low	Medium	

¹ provided the descriptive spec actually describes his products

² usually presumes the existence of an "office master" specification or re-use of previous project specs

³ more work to review proposed substitutions for acceptability

⁴ based on frequency in commercial, industrial, institutional, and multi-family residential specs

⁵ mostly public sector and for commodity products

⁶ if furnished to design professional by the listed manufacturer

⁷ but somewhat dangerous from the design professional's point-of-view, since a poor spec could allow lower quality products

Study of the table above reveals several points:

- The manufacturer's preferred method of "getting specified" (a sole-source brand name spec) is probably the type the design professional is least likely to write, unless the product simply has no equals or the quantity required is so small that competitive pricing is not very important. e.g. if only one is required, competitive pricing isn't as important as if thousands were required. This applies particularly to products with significant aesthetic impact.
- The manufacturer's second preferred method of "getting specified" (a sole source descriptive spec) is also not the design professional's preferred method of specifying, despite the fact that it would be the easiest to prepare if the manufacturer furnished the spec for his use. The principal difficulty the design professional has with proprietary specs is the uncertainty as to how competitive they are even when substitutions are explicitly allowed.

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- Of the methods most preferred by design professionals, all are "bad" from the unlisted manufacturer's point of view except the descriptive spec without names listed. Unfortunately, that method (the one used mostly in the public sector and for commodity products) also gives his competitors the same advantage. If you accept that descriptive specs are going to be written whether you like it or not, being listed in the spec is better than not being listed.
- Although allowing substitutions is considered more work by the design professional, that method is more common than not. The reason is to generate even more price competition. However, the manufacturers that are already listed still have an advantage in that situation, since the contractor knows they will be acceptable to the design professional – he requests quotes from them first.
- The specifying methods preferred by design professionals also require the most work on their part to produce. The two main methods of reducing that work are to use an "office master" spec as the "source material" for the new project spec or to re-use a previous project spec. Obviously, one of the keys to "getting specified" is to get listed in the source the design professional uses to produce his specs.

Sources of specs for commercial, industrial, and institutional projects

So what are the sources design professionals use to produce specs from? Design professionals in the U.S. have three options:

- Use a subscription master specification service (in the U.S., there are only 3 choices: BSD SpecLink-E, AIA Masterspec, and CSRF SpecText),
- Assemble a "home-grown" "office master" from multiple sources, including free government specs (which don't list manufacturers), specs that manufacturers give them, and sections they write themselves, or
- Re-use a previous project spec.

Sources of specs for commercial, institutional, and industrial projects ^b					
	BSD SpecLink	AIA Masterspec	CSRF SpecText	Home-Grown Office Master	Previous Project Spec
Type of system	Text database and software	Word processing files	Word processing files	Word processing files	Word processing files
Lists manufacturer names in most sections	Yes; select, short list of nationally known mfrs	Yes; usually long lists	None	Probably	Probably
Time frame for adding new manufacturers	Within 3 months, issued to all subscribers	Average section is updated once every 5 years	Not applicable, no mfrs listed	At any time	During a short spec preparation period
Ability to report to you the manufacturer names listed in project specs	Yes; reports based on data retrieved by software	No	No	No	No
Graphic notes to specifier	Yes	No	No	Maybe	Unlikely
Hyperlinks to web sites	Yes, direct to mfr's web site	Yes	Unknown	Probably	Unlikely
Ease of updating the office master	Automatic updating (done by software)	Manual updating (by comparison of new files to edited office master files)	Manual updating (by comparison of new files to edited office master files)	Done on demand	N/A
Ease of "penetration" by manufacturer	Very easy; fast delivery, painless incorporation into all office masters based on SpecLink's master text	Difficult; infrequent updating, manual incorporation into office masters	Very difficult; must treat each firm as separate target	Very difficult; must treat each firm as separate target	Extremely difficult; must treat each specifier/project as separate target

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⁶ the universe of firms and organizations who prepare specs is much smaller than the universe of architects and engineers. AIA estimates that one half of all AIA member firms are 4 persons or less. These small firms are usually unable to do commercial projects and often do not write conventional specs.

Study of the table above reveals several interesting points:

- All word processing-based methods (including Masterspec) are difficult to penetrate, since you must rely on the maintainer of the office master to update his firm's master to include new material, whether that material is delivered by their subscription service or directly from you. Firms using home-grown office masters must be treated as individual targets. From a manufacturer's point of view, SpecText subscribers must be considered home-grown master users, because the files they get from SpecText do not include any manufacturer names.
- It is not particularly difficult to get listed in Masterspec – they include long lists of manufacturer names – but if you're not currently listed it may be a long time before you are listed. Masterspec sections are updated approximately once every five years. If you missed the last update, you'll have to wait until the next. Once you get listed, Masterspec subscribers will get the new section file but most do not simply use the file as delivered. They will have made an "office master" out of it, with all their preferred edits and additions. The new file they get from Masterspec has to be compared to their office master file, page by page, and the relevant portions added to the master file. This is often so much work that many firms don't update their office master even though they subscribe.
- BSD SpecLink-E has several distinct advantages:
 - a) quick inclusion in the master text delivered to subscribers,
 - b) painless incorporation into office masters based on SpecLink-E (all new text automatically appears),
 - c) short lists of reasonably equivalent manufacturers (no long lists of distinctly different levels of quality),
 - d) Graphic Notes and Hyperlinks that provide additional mechanisms to induce the design professional to include your company's name rather than the other manufacturers also listed in the master text,
 - e) AND a way to evaluate the return on your "advertising" investment. Information about what has been included in project specifications is retrieved automatically from SpecLink-E subscribers and formatted into reports that show:
 - which projects by which firms have included that section,
 - which manufacturers have been listed in that section,
 - a summary of how many times a particular specification section has been included in actual project specs and how many times each manufacturer has been specified.

Are there alternatives to "getting specified"?

Considering the wide variety of specifying methods and the vast number of design professionals to target, some manufacturers decide that "getting specified" is too hard. Their approach is to target the actual buyers – the contractors – by offering a substitution. They need to convince the contractor and the design professional that the substitute is as good as what was originally specified. If their substitution meets the spec, all they have to do is convince the contractor to propose it and the design professional to consider it.

Some design professionals feel they have done a good enough research job already and don't want to consider other products – and their spec says that (i.e. "no substitutions"). If the substitution doesn't meet the spec, the contractor may have enough incentive to propose it (e.g the manufacturer offers lower cost) and then convince the design professional that the product is good enough. This is what's called "breaking the spec" – the design professional's job is referred to as "holding the spec." Some design

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professionals do a poor job of enforcing their specs, for a variety of reasons, so this technique is successful to some degree.

Because this process of getting substituted must be done on a project-by-project basis, it's difficult to see how that's easier than getting specified in the first place.

So how do you go about getting specified?

Your tactics depend on the source of the design professional's specs.

BSD SpecLink-E Subscribers:

- Get a copy of the Table of Contents of SpecLink-E and determine whether it includes a specification section on the type of products you make. [It's on the web.](#)
- Contact our BPM representatives to become a subscriber yourself.
- Review the spec to see whether a subscriber can correctly specify your products and whether your name is listed.
- Submit your recommended modifications for consideration.

AIA Masterspec Subscribers:

- Get a copy of the Table of Contents of Masterspec and determine whether it includes a specification section on the type of products you make.
- Get a copy of the spec – you can buy it for a nominal fee.
- Review the spec to see whether a subscriber can correctly specify your products and whether your name is listed.
- Contact Masterspec and find out when the next update for that section is scheduled.
- Submit your recommended modifications for consideration at the next update.

SpecText Subscribers: Contact SpecText to find out whether they have changed their policy against listing manufacturers. If not, you'll have to target their subscribers the same way you target "home-grown" office master firms.

Everybody Else:

- Start by making sure they can easily get a good spec on your products.
- Write, or have written for you, a proprietary spec that they can modify. It needs to be in an editable form – a word processing file (MS Word or Corel WordPerfect) – not a web page (.html) or an Acrobat Reader file (.pdf) or an ASCII file (.txt).
- Be sure your spec is in CSI 3-Part Format and formatted for easy modification. The use of Styles in Word is recommended.
- Post your spec **on your web site** – that's the first place a design professional will look for it.
- Consider other web sites where it could be posted – try ARCAT.com, Sweets.com, CMDfirstsource.com.
- Make sure your sales force knows how to send a copy of the file by email.
- Include a diskette with your spec in the catalogs you send to design professionals (if you still do that).

Beyond this, you'll have to consider all the traditional forms of advertising, calling on design professionals in their offices, box lunch presentations, etc.