PROJECT CHECKLIST - PRODUCTION FOLDER

Purpose: To get all necessary information into the hands of production rapidly so the product or service contracted can be produced exactly as ordered and delivered as quickly as possible.

CLIENT NAME:			
JOB NAME:			
JOB NUMBER:			
Job Site Address:			
Brief Job Description:			
Contacts/Phone Numbers:			
Project Manager:			
Field Superintendent:			
Resident/Owner:			
Start Date:	Be on the site at:	:	AM PM
Completion Date:			

OPERATIONS MANAGER

- ☐ 1. Make sure everything required is in the production folder.
- ☐ 2 Meet with production support and the shop/field manager to kick off the project.
- ☐ 3. Make the schedule for the project that meets or exceeds the client's requirements.

PRODUCTION SUPPORT

- ☐ 4. If required, get the field measurements and fill in the **Required Tools Checklist**.
- ☐ 5. Get shop drawings ordered as soon as possible.
- ☐ 6. Keep in touch with detailer and get drawings approved quickly.
- ☐ 7. Check existing stock and the get needed material lists made if not already and get at least three quotes on material.

- ☐ 8. Get material ordered from the supplier that will deliver on time for the best price.
- ☐ 9. Delivery date:_____(**Note**: Date should be one week ahead of start date in shop)
- ☐ 10. Put all required checklists into folders (safety, field survey, etc.)
- ☐ 11. Put Sign-Off/Completion form into the folder if needed. Circle item #25 below.
- ☐ 12. Note where the plans are being kept, if not in this folder.
- ☐ 13. Include in the folder any drawings or sketches or other data needed to get this job completed. If there is information that is not available yet, include a note below.
- ☐ 14. Put job on the scheduling board as soon as it can be scheduled with start date.
- ☐ 15. Plot the job out on the scheduling board all the way to completion date.
- ☐ 16. When at the site, take accurate field dimensions and fill in the **Required Tools Checklist** with as much data as possible so the installer will know what to bring.
- ☐ 17. Work out labor, materials, and any equipment needed and schedule as soon as possible.
- ☐ 18. **For field work:** travel, hotels, per diem payments, rental equipment, etc. must be worked out as early as possible to get the best pricing. Send all cost data to finance so it can be verified against the invoice if we are billed.
- ☐ 19. Put folder in "scheduled" bin until it is needed.

SHOP PRODUCTION MANAGER AND/ OR FIELD OPERATIONS MANAGER

- ☐ 20. Look over notes and drawings in the folder and determine what needs to be done.
- ☐ 21. Check with the production support manager to find out if any manpower and/or materials have been set aside for this job. Use material from stock if possible.
- ☐ 22. Get your crew and materials and get the job done.
- ☐ 23. Maintain **SAFETY** standards while you work.
- ☐ 24. Inspect and verify correctness of all work when complete.
- ☐ 25. Get Sign-Off/Completion form signed by contractor/field superintendent/owner if needed and put it in the folder.
- ☐ 26. When job is complete, send the folder to the quality control manager.

QUALITY CONTROL MANAGER

- ☐ 27. Inspect the job for quality. If any problems are found, get it corrected right away and then find out who is responsible they can be corrected and re-trained if needed.
- ☐ 28. When the project passes inspection, be sure to let all involved know and validate the personnel who did it.
- ☐ 29. Send the folder to the operations manager.

OPERATIONS MANAGER

- ☐ 30. Verify that all parts of job are complete in production so that the balance can be collected as soon as possible.
- ☐ 31. Send the folder to the finance manager.

FINANCE MANAGER

- ☐ 32. Take all of the paperwork from this folder and put it into the office folder. Follow the office folder routing form from this point on.

End of Routing Form. File this routing form in the folder with all other data.