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CONTRACTOR PROJECT SUCCESS SYSTEM WORKBOOK

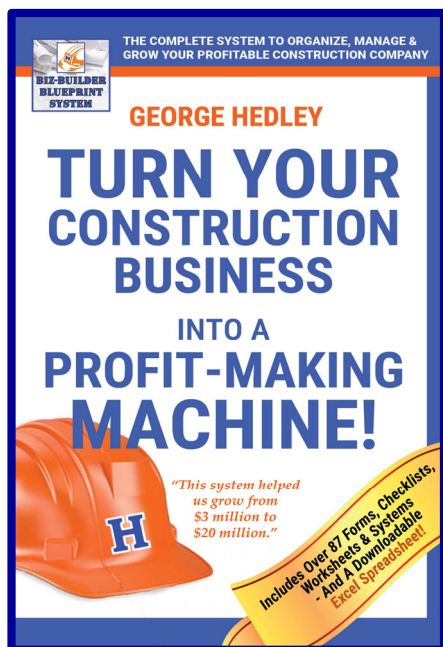
**George Hedley
Hardhat BIZCOACH**

Thanks For Watching My YouTube Video!

**As a Construction Business Coach, Consultant and Mentor,
My Goal Is To Help Contractors Get Organized, Grow & Always Make A Profit!**

I would like to discuss working together to help improve your business.

**Please Email Blueprint@HardhatBizcoach.com To
Schedule a Time for an **Introductory Zoom Coaching Session****



Available @ Amazon.com



**Email: Blueprint@HardhatBizcoach.com
To Schedule a BIZ-Improvement Coaching Session
To Help Develop Your Profit Plan**



ACCURATE
ESTIMATES

NO PROFIT MARGIN FADE

BUILD
CAPACITY

SCALE-UP

IMPLEMENT
BIZ-BUILDER
BLUEPRINT

GET YOUR BIZ TO WORK

GROW
& PROFIT

KNOW YOUR
NUMBERS

BUILD A BEST
IN CLASS BIZ

Complementary Coaching **FREE** & Hands-On Consulting Session



- Identify Issues, Find Solutions & Improve
- Get Organized, Systemized & In-Control
- Steps To Increase Profits & Production
- Draft Your Financial & Mark-Up Plan
- Build A Strong Team & Delegate



With
George Hedley
Hardhat BIZCOACH

Please Email Blueprint@HardhatBizcoach.com To
Schedule a Time for an **Introductory Zoom Coaching Session With George**
COACHING PROGRAMS OFFERED By George Hedley – Hardhat BIZCOACH

BIZCOACH ACCELERATOR

Hands-On Fast-Track Coaching - Retainer Program

- Regular BIZCOACH Zoom Sessions With George
- Pro-Active Coaching For Construction BIZ Owners
- Improve Systems, Strategy, Results & BIZ-PLAN

George Hedley HARDHAT BIZCOACH



PROFIT-MAKING MACHINE Annual Package

BIZ-BUILDER Deep-Dive Total Coach Program

Build An Organized, Self-Managed, Growing & High Profit BIZ

- Zoom Sessions + Onsite Management Team Meeting
- Hands-On Coaching, Advisor & Analyze Operations
- Strategic Planning & Improvement Initiatives
- Targets, Goals, Systems, Strategy & Plans

George Hedley HARDHAT BIZCOACH



PROFIT-BUILDER CIRCLE

Contractor Zoom Mastermind Peer Group

- Monthly Interactive Group Coaching Sessions
- Solutions To Your Issues & Challenges
- Education, Mentoring & Coaching



GEORGE HEDLEY
HARDHAT BIZCOACH



Draft Your Construction Company BIZ-PLAN



Work 1 On 1 With George Hedley As Your Coach & Mentor
Includes 6 Hours of Zoom Sessions + Worksheets & Templates
Transform Your BIZ Into A Profit-Making Machine!
Breakthrough Your Growth & Profit Barriers

Develop, Draft, Determine & Implement Your:

- ✓ 3 To 5 Year BIZ-PLAN, Financial Plan, Vision, Values, Targets & Goals
- ✓ Core FOCUS - High Margin Clients, Projects & Services
- ✓ Action Steps - Profit, Talent & Systems



George Hedley CPBC CSP
HARDHAT BIZCOACH
Construction Executive Business Coach



The BIZ-BUILDER BLUEPRINT SYSTEM

The Complete System To Organize, Manage & Grow A Profitable Construction Company

1. Implement step-by-step Strategies and Systems to Organize, Grow, Manage and Build a Highly Profitable Construction Company that Produces Results.
2. Get Organized and In-Control, Delegate, Let Go and Hold People Accountable.
3. Replace Yourself with Proven Standardized Systems, Processes, Checklists & Templates.
4. Stop the Stress & Chaos, Move Up to a Better Level, Make Money and Get Your Life Back.
5. Draft and Implement your 5-year Business and Financial Plan, Vision, Values & Goals.
6. Install Field and Project Management Systems to Finish Jobs On Time & Under Budget.
7. Improve Field Crew Production with Job Cost Scorecards and Proactive Schedules.
8. Design your Organizational Chart with Job Descriptions and a Talent Development Plan.
9. Know and Manage your Numbers Including Markup, Overhead, Profit, Job Cost and Sales.
10. Design a Marketing and Sales Program to Win More High Margin Customers and Contracts.
11. Stop Selling Low Prices, Develop Accurate Estimates and Present Winning Bids & Proposals.
12. Develop a Plan to Build Wealth, Passive Investment income and Freedom.



George Hedley is available to help you improve and reach your goals.

If you are looking for a **Professional Construction Business Coach** to help you move to the next level and reach your goals, you are at the right place.

As a Construction Business Coach, George helps construction company owners build, grow and improve their company's profit, finances, talent, management, operations, field production, sales, estimating and bottom-line results.

If you are ready to invest in your future, we can hold a no-charge initial Introductory Discovery Zoom Session to discuss how we can work together, and I can help as your coach, mentor, and advisor. We can explore your issues, challenges, and performance, plus your goals for a coaching program.

To Schedule an Introductory BIZCOACH Session with George

- Email Blueprint@HardhatBizcoach.com

With your email, please tell me:

- ✓ Your Name & Email
- ✓ Company, Location & Website
- ✓ Annual Sales Revenue & # Of Employees
- ✓ Type Of Work Performed
- ✓ Areas Needing Improvement





CONSTRUCTION STRATEGY



HARDHAT Construction Strategy - Our Top Field & Project Management Must-Do's

Mandatory Strategic Priorities & Accountabilities

1. Our Top Priorities Are To Hit All Job Budgets, Finish On-Time, Achieve Excellent Performance Ratings & Be Safe.
2. Our Company Systems, Process, Standards & Procedures Are Followed, Enforced & Maintained - No Exceptions.
3. We Follow All Contracts Without Exception - Terms, Conditions, Requirements, Deadlines, Documentation & Notices.
4. We Demand Performance - We Treat & Manage Subcontractors, Suppliers & Customers Firmly But Fair.
5. We Manage Change Orders Aggressively & Perform No Extra Work Without Documentation & Prior Authorization.
6. We Develop, Update, Track, Confirm, Communicate & Commit To Approved Job Schedules & Document All Delays.
7. We Only Hire Professional, Responsive, Properly Manned, Trained, Safe, Fair & Financially Strong Subcontractors.
8. All Employees Have Written Job Descriptions With Clear Results Accountable For & Tasks Responsible To Perform.
9. We Leverage Project Managers With Administrators, Assistants, Latest Technology & Integrated Software.
10. We Work Hard To Eliminate All Call-Backs, Re-Work, Extra Move-Ins, Punch-List Work & Warranty Work.



Mandatory Responsibilities, Activities & Tasks With Deadlines

1. We Hold Pre-Project Turn-Over Hand-Off Meetings With: Estimator, PM, PA, GS, Supt. & Foreman - Before Job Start.
2. We Hold Mandatory Onsite Pre-Job Start-Up Meetings & Field Meetings For All Subcontractors - Weekly.
3. We Hold Customer Onsite Pre-Job Start-Up & Job Meetings With Written Agendas & Minutes - Weekly.
4. PM Updates All Project Job Cost Budgets With Accurate Estimate Cost To Completes - Monthly.
5. PM Reviews Job Cost Production Tracking Scorecards With GS, Superintendent & Foremen - Weekly.
6. PMs, Superintendents & Foremen Attend Scorecard Production Meetings To Review Job Performance - Weekly.
7. We Maintain Project Paperwork - Approvals, COs, RFIs, Documentation, Correspondence & Approved Plans - Weekly.
8. PM Visit Jobs To Review Updated Schedule, Job Cost, Quality, Perform Punch-List & Jobsite Safety Report - Weekly.
9. Supt. & Foremen Update Look-Ahead Schedules & PM Reviews Onsite With PM & Supt / Fore - Weekly.
10. All Subcontracts & Major Material Orders Are Negotiated, Written & Executed - Within 3 Weeks Of Job Start.
11. We Get Submittals & Shop Drawings Approved - Within 1st Month Of Job Start.
12. PM, Supt Or GS Visit Jobsite To Verify Job Is Ready & All Required Material Is Onsite - 2 Days Prior To All Move-Ins.
13. PM, Supt Or GS Visit Jobsite To Verify Work Is Completed - Before Crew Leaves Jobsite.
14. PM, Supt Or Foremen Walk Job With Customer For Approval Prior To Leaving Jobsite @ Each Phase & Hold Final Job Walk-Thru With Customer, Supt, Fore & Subs Before Moving Off Jobsite.
16. PM Approves All Timecards Daily & Invoices With Correct Job Number & Cost Codes - Weekly.
17. We Invoice Progress Payment Requests On-Time & With All Required Paperwork - Monthly.



Construction Project Success Standards



- ✓ Our Goal Is To Make Every Project A Success For The Customer & Our Company.
- ✓ We Meet Or Exceed All Contract Requirements & Customer Expectations.
- ✓ Our Goal Is To Generate An Excellent Customer Performance Rating & 2 Referrals.

CONTRACT - We Build Per The Executed Contract, Specifications & Codes Without Exception

1. Our Subcontractors Follow, Manage, Document & Perform Per Their Subcontracts
2. No WIMPS! - We Train & Hold Our Customers & Subcontractors To Follow The Contract.

BUDGET - All Projects Must Meet Or Beat The Budget With No Profit Margin Fade.

1. Set, Achieve & Track Project Goals, Targets & Plans To Hit The Project Budget.
2. Track & Update Project Budgets With Estimated Cost To Complete & Final Job Cost - Monthly
3. Track, Update & Review Crew Production Job Cost Labor & Equipment Scorecards - Weekly.
4. Submit & Get Approved - All Change Order, T & M, Delay & Move-In Rates Prior To Job Start
5. Aggressive Pro-Active Change Order Management With No Verbal Agreements.
6. No Extra Work Without Executed Approvals Prior To Starting Any Extra Work.
7. Document Delays & Request Additional Time & Money With Every Change Order.

SCHEDULE - We Complete All Projects On-Time & On-Schedule Per Contract & Commitments

1. Prepare Job Progress Reports With Photos Daily With Employees, Co. Equip, Rentals & Subs.
2. Walk Job With Customer Prior To Leaving Jobsite @ Each Phase Or Completion.



PROJECT MANAGEMENT - We Maintain Experienced Professional Project Management On All Projects

1. We Use Professional Subcontractors & Suppliers Who Perform Per Schedule, Quality & Contract.
2. PM Visit Every Job Weekly To Review Job Costs, Production, Schedule, Quality, Punchlist & Safety.
3. No Extra Work Without Executed Approvals Prior To Starting Extra Work.
4. Procure & Execute All Subcontracts & Major Material Orders Within 3 Weeks Of Job Start.
5. All Submittals & Shop Drawings Submitted & Approved Within 6 Weeks Of Job Start.
6. Document & Track - Contract Requirements, Notices, RFIs, RFQs, PCOs, COs & Shop Drawings.
7. PM Approve Timecards & Invoices Weekly & Submit Project Payment Request Per Contract.

SUPERVISION - We Maintain Experienced & Professional Full-Charge Full-Time Supervisors On All Projects

1. We Produce High Quality Workmanship With No Call-Backs, Mistakes, Re-Work Or Punch-Lists.
2. We Maintain, Implement & Manage An Effective Pro-Active Safety Program With No Accidents Or Incidents.
3. Prepare Updated 2 to 4 Week Look-Ahead Schedule - Review Weekly With PM.
4. Supt / Fore Prepare Job Progress Report With Photos - Daily.
5. Maintain Updated Approved Plans, Specifications, Addendums & Submittals On-Site At All Times.
6. Daily Clean-Up, Trash Removal, Protect Adjacent Property & Keep Site Locked & Safe - Daily.
7. Visit Jobs 2 Days Prior To Crew Move-On To Verify If Ready & Prior To Move-Off to Verify Complete.
8. Schedule & Meet All Subcontractors & Major Suppliers Onsite 3 Weeks & 3 Days Prior To Needed.
9. Walk Job With Customer Prior To Leaving Jobsite @ Each Phase Or Completion.

MEETINGS - Mandatory Project Meetings

1. Project Pre-Job Turn-Over Hand-Off Meeting From Sales & Estimating To Project Team.
2. Pre-Job Start-Up Meeting Onsite With Customer & Jobsite Meetings With Customer Weekly.
3. Subcontractor Job Meeting - Weekly.
4. Crew Huddle-Up - Daily
5. Crew Review Meeting - Weekly.
6. All Foreman & Supervisor Results Review Meeting - Weekly.



Project Management Systems



Project Start-Up & Set-Up Systems

1. ___ Project Turn-Over Meeting Agenda
2. ___ Set-Up Job - Enter Into PM Software
3. ___ Download Plans Into System
4. ___ Finalize Job Budget & Cost Codes
5. ___ Set-Up Project Timecard
6. ___ Set & Track Project Goals
7. ___ Set Job Change Order & Mark-Up Rates
8. ___ Job Cost Update & Tracking
9. ___ Estimated Cost To Complete
10. ___ Finalize Schedule, Milestones, Long Lead Items
11. ___ Formalize Notice, Terms & Documentation Chart
12. ___ Standard Look-Ahead Schedule Template
13. ___ Establish Payment Procedure & Set-Up Template

Procurement Systems

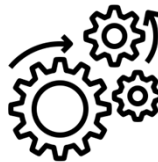
1. ___ General Contract Terms Checklist
2. ___ Standard Subcontract
3. ___ Standard Subcontract Attachments
4. ___ Standard Job Rules
5. ___ Project Change Order Rate Sheet
6. ___ Subcontractor Scope Checklists
7. ___ Standard Material Order
8. ___ Tracking System For Executed Subcontracts

Project Management Systems & Documentation

1. ___ Contract Conformance System
2. ___ Weekly Job Walk Agenda & Reports
3. ___ Project Documentation & RFI Tracking
4. ___ Project Payment Systems & Procedures

Project Administration Systems

1. ___ Contract Administration System
2. ___ Shop Drawing & Submittal System
3. ___ Change Order Tracking System
4. ___ Job Meeting Minutes Format
5. ___ Project Meeting Agendas
6. ___ Update Technology Systems
7. ___ Standard Job Meeting Minutes Templates



Job Cost Management Systems

1. ___ Project Cost Codes
2. ___ Project Timecard
3. ___ Project Change Order Template
4. ___ Change Order Rates & Mark-Up
5. ___ Project Budget Tracking
6. ___ Updated Job Cost Report
7. ___ Estimated Cost To Complete
8. ___ Invoice Approval System

Schedule Management Systems

1. ___ Project Standard Schedule
2. ___ Look-Ahead Standard Template

Customer Systems

1. ___ Customer Communication
2. ___ Project Performance Reviews
3. ___ Customer Relationship Building

Change Order Management Systems

1. ___ Change Order System
2. ___ Change Order Rate Sheet & Template
3. ___ Verify Allowable Mark-Up
4. ___ Delay Cost & General Conditions Template
5. ___ Move-In Cost Template
6. ___ Claims Management System

Project Management Meetings

1. ___ Project Turn-Over Meeting Agenda
2. ___ PM Project Review Meeting With VP - Weekly
3. ___ Customer Job Start-Up Meeting
4. ___ Customer Job Meeting - Weekly
5. ___ Logistics Crew Schedule Meeting - Weekly
6. ___ PM Visit All Jobs Weekly & Review:
 - Job Cost & Crew Scorecard With S & F
 - Look-Ahead Schedule & Production
 - Change Orders & Potential COs
 - Perform QC Punchlist & Safety Inspection
7. ___ Pre-Job Onsite Planning Meeting - PM-GS-S-F
8. ___ Pre-Job Field All Subcontractor Mtg. - Onsite
9. ___ Subcontractor Field Coordination Meeting -Weekly

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Field Management & Supervision Systems



Job Start-Up Systems

1. ☐ Site Planning System
2. ☐ Temporary Facilities System
3. ☐ Temporary Utilities System

Documentation & Communication Systems

1. ☐ Job Paperwork & Documentation Standards
2. ☐ Communication System
3. ☐ Daily Timecard System
4. ☐ Daily Equipment Tracking System
5. ☐ Daily Job Reports & Photo System
6. ☐ Customer Communication System
7. ☐ Subcontractor Communication System

Budget Systems

1. ☐ Production Job Cost Report Review
2. ☐ Overtime Standards

Change Order Management Systems

1. ☐ Change Order Approval System
2. ☐ Job Start-Up Checklist System
3. ☐ Mobilization Checklist



Equipment & Tools Management Systems

1. ☐ Equipment Maintenance System
2. ☐ Equipment Job Charge System
3. ☐ Equipment Inventory System
4. ☐ Equipment Profitability Tracking
5. ☐ GPS Tracking System
6. ☐ Tool Management System



Jobsite Management Systems

1. ☐ Look--Ahead Schedule Update
2. ☐ Quality Control System & Checklist
3. ☐ Weekly Punchlist Template
4. ☐ Weekly Safety Inspection System
5. ☐ Company Equipment System
6. ☐ Company Equipment Maintenance Standards
7. ☐ Rental Equipment Management System
8. ☐ Daily Material Delivery Ticket System
9. ☐ Expense Reimbursement System
10. ☐ Material Order & Delivery System
11. ☐ Final Punch-List Template & System
12. ☐ As-Builts System
13. ☐ Job Close-Out Checklist
14. ☐ Updated Technology

Company Field Standards

1. ☐ Move-On Standards
2. ☐ Move-Off Standards
3. ☐ Traffic Control Standards
4. ☐ Project Safety Standards
5. ☐ Tools Management Standards
6. ☐ Safety Equipment, PPE & Attire Standards
7. ☐ Clean-Up & Trash Standards

Job Meetings

1. ☐ Subcontractor Job Meeting Agendas
2. ☐ Customer Meeting Agenda
3. ☐ Crew Meeting Agendas
4. ☐ Safety Meeting Agendas



Construction Project Success System

1. Pre-Construction Planning System



A. Pro-Active Contract Management

1. Read, Understand & Follow Executed Contract - Terms, Scope, Plans, Specs, Inclusions & Exclusions.
2. Contract Requirements, Documentation, Payment, Schedule, Milestones, Changes & Notice.

B. Hold Pre-Job, Pre-Construction, Turn-Over, Kick-Off, Hand-Off Meeting

1. Hand-Off Turn-Over From Estimating & Sales To Project Team - *Hold Within 1 Week Of Signed Contract*
2. Attendees: Gen. Mgr. (GM), Sales, Estimator, Project Mgr. (PM), PC/PA, Gen Supt (GS), Supt (S) & Fore (F).
3. Prior To Meeting: PM, S & F Visit Jobsite, Review Plans, Draft Schedule & Estimate Crew Hour Budget.
4. Review Estimate, Contract, Scope, Inclusions, Exclusions, Allowances, Terms, Notices, Documentation, etc.
5. Set & Agree On Project Goals - Budget, Completion, Quality, Crew Production, Customer Satisfaction, etc.
6. Establish Budget - Cost Codes, Timecard, Change Order Mark-Up & Rates, Delay & Gen. Cond. Rates.
7. Commit To Schedule - Phases, Move-Ins, Milestones, Deadlines, Completion & Job Meetings Schedule.
8. Review Proposed Subcontractors, Material Suppliers, Value-Engineering & Buy-Out Potential.
9. Draft Project Mobilization, Staging, Safety, Security, Quality Control, Temporary Items & Phasing Plan.
10. Verify Level Of Authority & Spending Limits For PM, S & F Without Approvals.

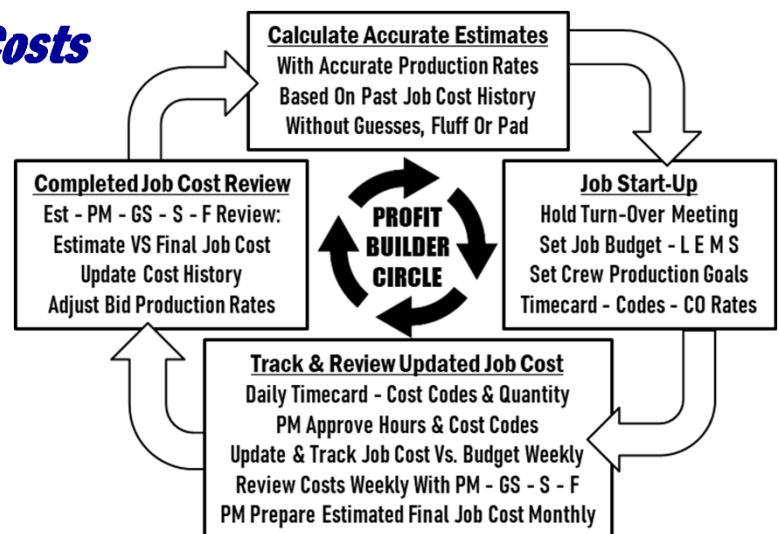


C. Hold Customer Pre-Project Start-Up Meeting @ Jobsite

1. Hold Pre-Job Customer Meeting On Jobsite - Be Pro-Active.
2. Train Your Customers & Subcontractors To Follow The Contract!
3. Review Contract Terms, Inclusions, Exclusions, Procedures, Updated Plans & Documents.
4. Review Documentation, Communication, Notices, Authority, Submittals, Claims, Disputes & Deadlines.
5. Review Payment Process & Deadlines, Retention, Insurance, Bonds & LDs.
6. Review Schedule - Start & Completion Dates, Milestones, Phases, Move-Ins, Weather, Notices & Delays.
7. Review Change Order Process, Labor & Equip Rates, General Conditions Costs, Mark-Up & Delay Costs
8. Review General Conditions & Time Extension Rates, Mobilizations Included & Delay Costs.
9. Review Quality & Safety Requirements, Punch-List, Close-Out Requirements & Meetings Calendar.

Track & Review Updated Job Costs

1. Prepare Accurate Estimate
2. Set Project Budget, Goals & Rates
3. Update Job Costs VS. Budget & Estimated Cost To Complete
4. Review Final Job Costs VS. Estimate & Update Bid Rates



2. Pro-Active Project Management System



A. Total Overall Project Management & Responsibility To Achieve Project Success

1. **PM Is 100% Accountable & Responsible To Achieve Project Success, Results & Performance:**
 - Pro-Active Project Leadership & Planning, Team Management, Coordination & Monitoring.
 - Set, Track, Monitor, Update, Communicate & ACHIEVE Project Targets & Goals:
 - *Contract, Financial, Schedule, Quality, Safety, Field Production & Customer.*
 - Hold Project Team Accountable To ACHIEVE - Goals, Deadlines, Responsibilities, Duties & Tasks.
 - Implement, Manage, Monitor & Enforce Systems & Strategy.
 - Manage, Track, Monitor & ACHIEVE - Financial, Budget & Job Cost Results, Targets & Goals.
 - Project Team, Superintendent, Foreman, Crew, Administration - Production, Performance & Results.
 - Contract Management, Conformance, Documentation, Correspondence, Reports & Paperwork.
 - Subcontractor & Supplier Performance & Results - Procurement, Contract Conformance, Management, Coordination, Documentation, Communication & Relationships.
 - Schedule Management - ACHIEVE, Track & Update Schedule & Completion Dates.
 - Change Order Management, Documentation & Approvals.
 - Progress Payments, Timely Invoice Management, Submittals & Approvals.
 - Quality & Workmanship - Punchlist, Call-Backs, Re-Work & Project Close-Out.
 - Safety Plan, Conformance, Documentation & Results.
 - Meetings Management & Implementation.
 - Maintain Customer Relationships With Pro-Active Communication & Documentation.
2. **PM Prepares Updated Job Cost Report, Accurate Estimated Cost To Complete & Final Job Cost - Monthly.**
3. **PM Pro-Actively Communicates Verbally With S & F Daily & Customer Weekly.**
4. **PM Visit Jobs Weekly To Perform Detailed Job-Walk & Inspection With S & F To Review:**
 - Planning, Field Coordination, Potential & Current Change Orders & Contract Documentation.
 - Weekly Updated Job Cost Production Scorecard & Quantity Installed - L & E Actual Vs. Budget.
 - Review Quality & Workmanship. Prepare Punch-List Inspection & Safety Inspection Reports.
 - Updated Look-Ahead Schedule & Actual Completion Vs Schedule.
 - Perform Final Project Walk-Thru & Complete Job Close-Out Documentation Package



B. Punctual Payment, Invoice, Job Cost & Budget Management

1. **Construct, Manage & Complete Projects On-Budget (Or Under).**
2. **PM Manage, Track, Monitor & Update Project Budget & Job Cost Report - Monthly.**
 - *Prepare Accurate Projected Final Job Cost VS. Budget - Monthly.*
 - *Prepare Accurate Estimated Cost To Complete.*
3. **PM Manage, Track, Review & Communicate Updated Crew Job Cost Production Scorecard - Weekly.**
4. **PM Verify & Approve With Correct Job Cost Codes All:**
 - *Crew Labor Timecards - Daily.*
 - *Crew Equipment & Job Materials - Weekly.*
 - *Job Invoices - Weekly.*
5. **PM Manage, Prepare & Submit Project Payment Requests On-Time Per Contract With Required Paperwork.**
6. **PM Verify & Prepare Completed Final Job Cost Report & Review With Estimator, PM, GM & S.**



2. Pro-Active Project Management System - Continued



C. Prompt Procurement & Subcontract Awards

1. Help Those Who Help You! - Always Award To Lowest Responsible Qualified Bidders
2. Award & Execute ALL Subcontracts & Material Orders PRIOR To Or Within 2 - 3 Weeks Of Job Start.
 - Use Contract Scope Checklist. - 2 Approvals Required.
 - Meet Face To Face To Review Terms, Scope, Schedule, Manpower, Move-Ins & Supervision.
3. Terms, Inclusions & Exclusions In Contracts & Subcontracts - Use Quote Comparison Spreadsheet.
 - Detailed Scope, Terms, Plans, Specs, Schedule Of Values, Price Escalation & Material Availability.
 - Schedule, Milestones, Phases, Crew Size, Move-Ins, Mobilizations, Permits, Tests & Inspections.
 - Payment Terms, Procedures, Process, Deadlines, Retention, No Pay For Stored Materials.
 - Move-Ins,, Documentation, Approvals, Notices Required, Submittals Required & Deadlines.
 - Change Orders, T & M Rates, Mark-Up, General Conditions, Move-Ins & Delay Costs.
 - Meetings, Supervision, Authority, Quality Control, Close-Out & Warranty, Back Charges & Punch-List.
 - Job Rules, Safety, Temp. Utilities & Facilities, Toilets, Clean-Up, Trash, Security, Parking & Storage.

D. Squish The Schedule 10%

1. Confirm & Communicate Original & Updated Schedule To Customer, Subcontractors & Suppliers In Writing.
2. Document All Schedule Changes, Delays, Weather Issues, Cost Impacts & Time Extensions - As Occurred.
3. Supt / Fore Prepare Updated 2 - 4 Week Look-Ahead Schedule Weekly For PM Review.
4. PM Visit Jobs Weekly To Perform Detailed Job-Walk With S & F To Review Updated Crew Production Scorecard, Inspect Quality & Safety, Review Updated Look-Ahead Schedule & Completion, Conformance.
5. Subcontractors Walk Jobsite With Supt/Fore @ 4 - 2 & 1 Week Prior To Scheduled Work Phase Start Dates.
6. PM, Supt & Foremen Attend Weekly Field Production Scorecard Results Review Meeting To Review Results, Updated Schedules & Crew Production - Work Completed VS. Budget & Planned.

E. Perform Punctual Contract & Project Documentation, Correspondence & Communication

1. Document All Contract Requirements, Notices, RFIs - Request For Information & Approvals.
2. Prepare & Manage Project Administration, Notice, Terms & Milestone Charts.
3. Document All Proposed Change Orders, Claims, Delays & Time Extensions - Weekly.
4. Communicate Verbally &/Or In-Person With Customer On Regular & Weekly Basis.
5. Maintain Latest Approved Plans & Specifications & Communicate Updates To Field & Subcontractors.
6. Create Required Submittal List Within 1st Week Of Job Start & Obtain Approvals Within 3 - 4 Weeks Of Start.
7. Prepare & Submit Job Report & Customer Meeting Minutes - Weekly.
8. Maintain Contract Required Insurance, Bonds, Permits, Inspections & Engineering.
9. Prepare Job Close-Out Checklist & Close-Out All Documentation Within 2 Weeks Of Substantial Completion.
10. Obtain Completed Project Performance Survey From Customer.



F. Aggressive Change Order Management

1. Document & Manage All Extra Or Change Order Work, Time Extensions, Delays & Approvals Aggressively.
2. Train Your Customers - Prior To Job Start - Meet With Customer To Review & Agree On Change Order Terms.
 - Change Order & T&M Rates; Labor & Equipment Rates; Foreman, Supervision & PM Rates.
 - Mark-Up Rates, Liability Insurance & Bonding Costs.
 - Delay Costs - Daily General Conditions, Weather Rates & Extra Move-In Rates.
3. Document All Project Issues, Changes, Notices, Claims, Delays, Time Extensions, etc. Within 3 to 5 Days.
4. Get All Extra Or Additional Work & Change Orders Approved In Writing Prior To Starting Extra Work.
 - Follow The Contract! - Never Give It Away! - No FREE Work Or 'Trade-Offs' Without Pre-Approval.
 - Manage & Keep Change Orders Current - Submit Price Within 3 to 5 days. - No Verbal Agreements!
5. Always Ask For Extra TIME & Associated Cost To Perform Additional Work.
6. Maintain Proposed & Executed Change Order Tracking Logs Current.
7. Maintain Pending Issues Log & Uncharged Extra Free Work Performed Log



3. Field & Crew Production Performance System

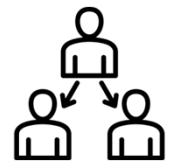


A. Pre-Mobilization Jobsite Review

1. Prior To Mobilization - GS, PM Or S Meet With Customer Onsite To Review:
 - Schedule, Phases, Mobilizations, Scope, Conflicts, Change Order Process, Meetings, Etc.
 - Site Access, Staging, Storage, Security, Workspace Requirements, Trash & Safety.
 - Temporary Facilities, Power, Water, Parking, Job Rules, Permits, Inspections, etc.
2. Supt Or Foreman Prepare Project Work Plan, Pre-Job Start-Up Checklist & Mobilization Checklist.
3. GS, PM Or S Always Visit Jobsite 2 - 4 Days Prior To All Move-Ins To Verify Job Is Ready.

B. Pro-Active Project Field & Crew Supervision - Supervisors & Foremen Provide & Perform:

1. No Change Order, Additional, Extra Or Free Work Allowed Without Prior Authorized Written Approval.
2. No Overtime Allowed Without Prior Approval Of PM & GM Within Estimated Budget Allowance.
3. Implement ZERO Punchlist, ZERO Call-Backs & ZERO Lost Time Accidents Program.
4. Superintendent & Foreman:
 - Communicate Verbally With PM - Daily.
 - Prepare Digital Job Reports With Photos - Daily
 - Complete Accurate Digital Crew Timecards Coded To Right Cost Codes & Quantities - Daily.
 - Complete Accurate Digital Company Equipment & Rental Equipment Utilization Sheets - Weekly.
 - Complete Updated Digital 2 - 4 Week Look-Ahead Schedule & Submit To PM Review - Weekly.
 - Call Off All Equipment, Tools & Rentals When Completed.
 - Prepare & Turn-In Weekly Punch-List, Quality, Clean-Up & Safety Inspection Report - Weekly.
 - Complete All Outstanding Quality, Clean-Up, Punch-List & Safety Items - Weekly.
 - Prepare Final Punch-List 2 Weeks Prior To Completion & Complete All Items Prior To Final Customer Job-Walk & Punch-List.
 - Always Enforce Company Standards, Policies, Rules, Attire & Safety With Crew & Subcontractors.
 - Never Leave Jobsite Without A Responsible Lead Or Foreman In Charge Of Crew.
 - Never Leave Jobsite To Go To Store Or Supply House - Send Crew Member If Required.
5. General Contractor Field & Crew Management
 - Confirm & Document Subcontractor Move-Ons & Deliveries @ 4 - 2 & 1 Week PRIOR To Required.
 - Meet Onsite With All Subcontractors 1 Week PRIOR To Needed On Job @ Each Move-In Or Phase.
 - Hold Project Meetings With Attendance Required By All Subs On Job & Required In Next 15 to 30 Days.
6. Subcontractor Field & Crew Management
 - Call, Email & Confirm With Customer @ 4 - 2 & 1 Weeks Before Needed On Job.
 - Hold Customer Job-Walk 1 Week & 1 Day Prior To Moving ON Job @ Each Phase To Verify Ready.
 - Hold Customer Job-Walk Prior To Move OFF @ Each Phase - Verify Completed & Cust Signed Off.
7. Deliver All Equipment & Materials To Jobsite Minimum 3 To 5 Days PRIOR To Scheduled Work Phase Start.



C. Prepare Weekly Look-Ahead (Think-Ahead) Schedule

- S Or F Prepare Digital 2 - 4 Week Look-Ahead Schedule Weekly & Submit To PM Weekly.
- Look-Ahead Schedule To Include:
 - Crew Labor, Tools, Company Equipment, Rental Equipment, Materials & Supplies.
 - Inspections, Work Planned, Subcontractors, Milestones & Contract Completion Date.
- PM, GS, S & F Meet Onsite To Review Look-Ahead Schedule, Upcoming Work & Performance - Weekly.



4. Job Cost Scorecard Crew Production Tracking System

A. Prepare, Update & Review Updated CREW Job Cost Production Scorecard - Weekly

- 1. Project Team Develop & Commit To Project Crew Production Labor & Equipment Hours Budget.**
- 2. Job Cost Accounting Produces Updated Project Crew Production Scorecards - Weekly.**
 - ***Actual Crew Hours Performed To Date VS. Budgeted Hours For Quantities Installed.***
- 3. PM Reviews Job Cost Labor & Equipment Production Scorecards With GS, S & F - Weekly.**
 - ***Team Develop Plan To Complete Jobs On-Budget Based On Current Performance.***
- 4. Hold Field Production Scorecard Results Review Meeting With All PM, GS, S & F - Weekly Or Bi-Weekly.**
 - ***Review All Project Job Cost Crew Production Scorecards.***
 - ***Analyze Crew Production Performance, Results & Strategies.***
 - ***Review All Completed Project Crew Production Performance Results To Seek Improvements.***



WEEKLY <u>JOB</u> Detailed SCOREBOARD - 1 Job									
Job Name:			PM:		SUPT:		FORE:		
WEEK ENDING:				CREW LABOR HOURS					
				TOTAL BUDGET CREW		FOREMAN ESTIMATED ACTUAL % COMPLETE	TO DATE BUDGETED CREW HOURS	TO DATE CREW HOURS ACTUAL	TO DATE + OVER + (UNDER) BUDGET
COST CODE	WORK TASK	Quantity	Installed	HOURS	UNIT		HOURS		
32002	LAYOUT			200	HOURS	100%	200	180	(20)
32005	EXCAVATE			400	HOURS	70%	280	275	(5)
32010	FORM			1,000	HOURS	50%	500	550	50
32015	SET EMBEDS			250	HOURS	20%	50	60	10
32020	POUR			300	HOURS	0%	-		-
32050	CLEANUP			200	HOURS	0%	-		-
TOTAL				2,350	HOURS	44%	1,030	1,065	35

WEEKLY ALL JOB SUMMARY SCOREBOARD						 GEORGE HEDLEY HARDHAT BIZCOACH		
WEEK ENDING:				CREW LABOR HOURS				
				TOTAL	FOREMAN ESTIMATED ACTUAL %	TO DATE	TO DATE	TO DATE
				BUDGETED		BUDGETED	CREW	+ OVER +
				CREW		CREW	HOURS	(UNDER)
				HOURS	COMPLETE	HOURS	ACTUAL	BUDGET
Job Name:	PM/ SUPT / FORE	Quantity	Installed		UNIT			
Mission	Dan/Bill / Dave			2,000	HOURS	50%	1,000	900 (100)
Main Street	Dan/Joe/ Jose			4,000	HOURS	60%	2,400	2,600 200
ABC Job	Dan/ Ace/Will			3,000	HOURS	30%	900	850 (50)
Acme Job	Bob/ Bill/ Amie			800	HOURS	70%	560	600 40
Jones Job	Bob/ Dan/ Cal			3,500	HOURS	20%	700	1,000 300
Smith Job	Bob/ Fred/ Harry			6,000	HOURS	25%	1,500	1,400 (100)
TOTAL				19,300	HOURS		7,060	7,350 290

COMPLETED JOBS RECAP SCOREBOARD										Date:						
								CREW LABOR HOURS		% MH	+ Over +	EQUIPMENT HOURS			% EQUIP	+ Over +
Job Name	EST	PM	SUPT	FORE	Target		MH Spent		Spent	(Under)	Target		Results		Spent	(Under)
Smith Buildings		Sam	Joe	Chuck	3,000	MH	3,200	MH	107%	200	1,200	Hrs	1,350	Hrs	113%	150
Acme Warehouse		Sam	Will	Fred	5,000	MH	4,700	MH	94%	(300)	1,000	Hrs	900	Hrs	90%	(100)
ABC Center		Dave	Juan	George	7,500	MH	7,900	MH	105%	400	800	Hrs	900	Hrs	113%	100
Warner Plaza		Dave	Matt	Harry	2,500	MH	2,100	MH	84%	(400)	400	Hrs	350	Hrs	88%	(50)
City Center Building		Bill	Jack	Ken	10,000	MH	9,600	MH	96%	(400)	1,600	Hrs	1,500	Hrs	94%	(100)

5. Project Close-Out & Completion System

- 1. S or F Hold Job-Walk With Customer Prior To Leaving Jobsite @ Each Move-Off Or Phase.**
- 2. PM, S or F Hold Prelim Job-Walk With Customer & Subcontractors 2 Weeks Prior To Completion.**
- 3. Prepare Final Punch-List 1 Week Prior To Completion & Complete All Items Prior To Final Customer Job-Walk.**
- 4. Complete Project Close-Out Checklist, Submit All Documentation, As-Builts & Contract Requirements Within 2 Wks.**
- 5. Complete All Punch-List Items Within 2 Weeks After Substantial Completion.**
- 6. Hold Project Close-Out Meeting - Est, PM, GM, GS, Supt, Fore**
 - *Review Results, Job Cost, Schedule, Performance, Customer Relationships, Lessons Learned, etc.***
- 7. Job Cost Review - Est, PM, S & F PM Review Final Job Cost Versus Estimate & Update Cost History Library.**
- 8. Prepare & Obtain Customer Performance Review Survey.**



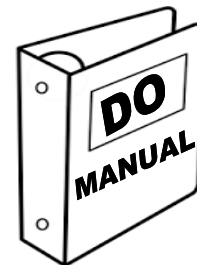
Written, Tracked & Monitored BIZ-SYSTEMS Get Your BIZ To Work!

Draft Your MANDATORY Winning PLAYBOOK = "DO MANUAL"

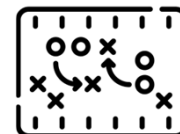
Get Everyone On the Same Page Doing Same Things the Same Way!

BIZ-Systems Provide Clear: G. E. A. R.

- *Guldellnes*
- *Expectations*
- *Accountablilties*
- *Responsiblilties*



Mandatory Construction PM SYSTEMS



1. Follow The Executed Contract!
2. Hold Pre-Job Customer On-Site Start-Up Meeting
3. Develop, Confirm, Communicate & Commit To Job Schedule
4. Award & Execute ALL Subcontracts Prior To Job Start!
5. Get Submittals & Shop Drawings Approved NOW
6. Order ALL Materials Prior To Job Start!
7. Pro-Active Project Management & On-Site Supervision
8. Set, Track & Communicate Job Cost MH Budget With Fore
9. Maintain Project Paperwork

- *RFI, Documentation & Approved Plans & Specs*

10. Require Pre-Job & Weekly Look-Ahead Schedules From Fore & Subs

- *Major Materials, Misc. Materials, Tools & Equipment*

11. Manage Change Orders Aggressively! = NNNN & No V.A.'s
12. Invoice On-Time & With All Required Paperwork
13. Weekly Quality Punch-List, Clean-Up & Safety Inspection
14. Hold Final Job Walk-Thru With Customer, Supt, Fore & Sub

Mandatory Meetings

- ✓ Customer Jobsite Start-Up Meeting
- ✓ Crew & Subcontractor Pre-Job Start-Up Meeting
- ✓ Weekly Field Scorecard Meeting - All S, F & PM
- ✓ Weekly Crew & Subcontractor Meeting
- ✓ Pre-Completion Jobsite Walk-Thru & Punchlist
- ✓ Crew - Daily Team Huddle-Up & Safety Meeting
- ✓ Quarterly All Company & Crew Meeting

Field Change Order Approval Memo PCO #27

To: Customer From: Joe Supt. Project: The Perfect Project Re: Additional Trim

This Is To Confirm The Field Change Additional Work Item Authorized:

Today, Customer requested us to add additional window trim @ 2nd floor per Detail 12. Based on Contract & Pre-Approved Rates, Customer authorizes us to proceed with additional work not included in our Contract and agrees to increase contract price & completion date based on costs & time incurred to perform added Work. We shall proceed & submit a formal change order within 7 days after completion of work.

SEE PHOTO & Details of Work Attached.

Additional COST: Cost Plus T & M Per Standard Rates Additional TIME: 4 Extra Days

Sincerely: George H Approved: _____ Date: _____

Get Signed!
FAX Or EMAIL
Immediately!



ACCURATE ESTIMATES

NO PROFIT MARGIN FADE

BUILD CAPACITY

SCALE-UP

IMPLEMENT BIZ-BUILDER BLUEPRINT

GET YOUR BIZ TO WORK

GROW & PROFIT

KNOW YOUR NUMBERS

BUILD A BEST IN CLASS BIZ

Winning Construction Field Project SYSTEM



1. Follow The Executed Contract!
2. Award & Execute ALL Subcontracts Prior To Job Start!
3. Order ALL Materials Prior To Job Start!
 - *Get Submittals & Shop Drawings Approved NOW*
 - *All Materials, Supples, Equipment, Tools, Scaffold, etc. - On-Job 2 Days Prior To Crew Start*
4. Hold Pre-Job Customer Onsite Start-Up Meeting
 - *Review Specifications & Schedule*
5. Hold Onsite Crew Or Subcontractor Pre-Job Start-Up Meeting
 - *Set, Track & Communicate Job Cost MH Budget With Foreman*
 - *Review & Commit To Job Schedule*
 - *Review Safety Requirements*
6. Superintendent
 - *Verify Job Is Ready To Start Prior To Schedule Crew*
 - *Supt Visit Jobsite Daily & Talk to Foreman*
 - *Supt Check-In With Customer Every 2 Days*
7. Crew Foreman / Leader
 - *Prepare & Complete Weekly Punch-List & Clean-Up*
 - *Change Orders - No Extra Work Without Prior Approval*
 - *Hold Daily Crew Team Huddle-Up*
 - *Hold Weekly Crew Safety Meeting*
 - *Turn-In Timecards Daily With Daily Report*
 - *Turn-In 2 Week Look-Ahead Schedule Weekly*
8. Supt Pre-Complete Jobsite Walk-Thru & Punchlist With Cust.
9. Hold Final Job Walk-Thru With Cust, Supt, Fore & Subs
10. Review Final Crew Production Hours At Job Completion
11. Invoice On-Time & With All Required Paperwork

2 Week "Look-Ahead" Schedule

ACTIVITY	M	T	W	T	F	S	S
LABOR							
-							
EQUIPMENT							
- Co. Equipt							
- Co. Tools							
- Rental Equip							
MATERIALS							
- Lumber / Trim							
- Supplies							
SUBCONTRACTS							
-							

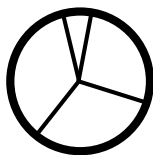
My Construction Field Must-Do SYSTEMS

1. _____
2. _____
3. _____
4. _____
5. _____



Construction Is A 4 Letter Word: _____! (RISK)

- Construction RISK IS A 5 Letter Word? _____ (LABOR)



1. Planning Results = 2% = _____ / Hours / Day

2. Producing Results = 37% = _____ / Hours / Day-

3. Supporting Results = 27% = _____ / Hours / Day

4. Wasting Time = 36% = _____ / Hours / Day

Average Construction Crew

Wastes _____ Hours / Day

Situations, Problems & Activities

Which Cause Field Crew Productivity To Slow Down?

- _____
- _____
- _____
- _____

**How Can You Improve Field Crew Productivity
& Reduce Wasting Time On Jobs?**

- _____
- _____
- _____
- _____

Strategies & Systems To Improve Crew & Field Production



A. Prepare, Update & Review Updated CREW Job Cost Production Scorecard - Weekly

1. Project Team Develop & Commit To Project Crew Production Labor & Equipment Hours Budget.
2. Job Cost Accounting Produces Updated Project Crew Production Scorecards - Weekly.
 - *Actual Crew Hours Performed To Date VS. Budgeted Hours For Quantities Installed.*
3. PM Reviews Job Cost Labor & Equipment Production Scorecards With GS, S & F - Weekly.
 - *Team Develop Plan To Complete Jobs On-Budget Based On Current Performance.*
4. Hold Field Production Scorecard Results Review Meeting With All PM, GS, S & F - Weekly Or BI-Weekly.
 - *Review All Project Job Cost Crew Production Scorecards.*
 - *Analyze Crew Production Performance, Results & Strategies.*
 - *Review All Completed Project Crew Production Performance Results To Seek Improvements.*

B. Project FIELD & Crew Improvement Strategies & Systems

1. PM Job Walk Project With Supt & Foreman - Weekly.
2. Prepare Look-Ahead Schedule & Safety Inspection - Weekly
3. Perform Weekly Punchlist & Complete All Items Within 1 Week.
4. Order & Schedule Materials, Equipment & Tools Onsite 3 Days Prior To Needed.
5. Walk Job With All Subcontractors 3 Weeks & 3 Days Prior To Needed.
6. Subcontractors Attend Pre-Job Start-Up & Weekly Field Coordination Meetings.
7. No Overtime Or Additional Crew Members Without Prior Approval Of PM In Advance.
8. Never Schedule Crew To Move-On Without Visiting Site First
9. Crew Never Leaves Job At Phase Completion Without Documented Customer Job Walk.
10. Have Crew Member Arrive Early To Layout Tools & Equipment By 7am.
11. Crew Member Stay Late To Clean-Up Job & Put Away Tools & Equipment.
12. Weekly Crew Truck & Job Trailer Inventory - Tools, Supplies, Equipment, Etc.
13. Enforce Crew Rules - No Crew Worker Cell Phones, Drinking, Drugs, Smoking, Loud Music Or Pets.



Maximize Field Crew Production & Efficiency!



- What Can Affect Crew Production?

Direct Crew Production Reducers

1. Poor Or Lack Of Supervision Or Leaves Jobsite
2. Working Foreman Operates Equip Or Works
3. Poor Planning, Work Scheduling & Sequencing
4. Lack of Materials, Double Handling Or Waiting
5. Lack of Equipment & Tools - Waiting
6. Inefficient, Broken, Wrong, Bad Or Lost Tools
7. Jobsite Congestion, Organization & Messy
8. Not Planning For Weather Or Other Factors
9. Mistakes, Punch-List, Call-Backs & Re-Work
10. Extra Move-Ins, Job Not Ready Or Finished
11. Poor Site Layout & Planning
12. Only 1 Person Working While Crew Watches

Indirect Team Production Reducers

- NO Score & No Clear Measurable Targets
- NO Systems, Standards & Playbook
- BAD Coach & NO Teamwork
- No Incentives To Achieve Results



20 Man Crew @ \$50/Hour @ 200 Days/Year

= \$8,000 / Day = \$40,000 / Week = \$1,600,000 / Year

- Loses 30 Min./Day = \$ _____ Annual Loss
- GC Beats Schedule By 10% - 200 Day = 20 Days
General Conditions Save / Job @ \$1,700/Day
X 20 Days = \$ _____ /Job
- Crew Squishes Schedule 10%
= 200 Days <10%> = 20 Days = \$ _____ /Year
- Offer Field Incentive Pay @ \$100 / Day / Man
 - Finish Job 2 Weeks Faster = \$ _____ Saved
 - Less Incentive Pay = \$ _____ /Year
 - Net Saved = \$ _____
- Tired TOOLS Loses 5 Min/Hr = 13.33 Hrs/Day
= 20 Man Crew 200 Days = 3,333 Hrs/Year Loss
= \$ _____ Loss/Yr
- Buy Better Tools @ \$1,000 Per \$ 20,000 /Year
- Net Savings = \$ _____ /Year

Field Production Improvement Plan

- ☐ Update L & E Crew Production Scorecard - Weekly
 - PM Visit Jobsite Weekly & Review With S & F
 - Hold Crew Scorecard Review Meeting - Weekly
- ☐ Implement Crew Performance Incentive Program
- ☐ Set Crew Rules & Standards:
 - Daily Crew Huddle-Up With Clear Daily Goals
 - Crew Performance & Safety Review Meeting - Wkly
 - Start Time - Break - Quit Time - Roll-Up Time
 - Lunch - 30 Minutes Without Leaving Jobsite
 - NO: Cell Phones - Smoking - Dogs - Music
 - Daily Clean-Up & Weekly Tool Inventory
 - PPE, Attire, Hardhat, Shoes, Safety Standards
 - NO Drinking, Drugs, Stealing & Borrowing Tools
- ☐ Foreman Never Leaves Jobsite Without:
 - Lead Crew Journeyman In Charge
 - Send Crew Member To Store, Supplier, Shop
- ☐ Foreman Assigns Crew Member To:
 - Arrive 30 Minutes Early & Stay 30 Min. Late
 - Layout Crew Tools & Materials & Clean-Up
 - Start, Shut Down & Maintain Equipment
- ☐ GS, Supt Or Fore Visit Job 1 To 2 Days PRIOR To:
 - Scheduling Crew & Start Work - Verify Job Ready
- ☐ Crew Never Leave Job After Each Phase Without:
 - Getting Sign-Off From Customer & Photos
 - Removing All Left-Over Materials & Debris
 - Calling Off All Rental Equip & Temp Facilities
- ☐ Mat'l's, Tools & Equip On Job 2 Day Before Needed
- ☐ Prepare Efficient Jobsite Layout, Power & Temp Facil
- ☐ Supt Or Foreman Prepare & Update Weekly:
 - Look-Ahead Schedule & Review With GS & PM
 - Punch-List & QC Inspection Report
 - Job Safety Inspection Report
- ☐ No OT Without Prior Approval By 2pm
- ☐ No Extra Move-Ins Or Mobs Without Pre-Approval
- ☐ Co. Equipment & Tools Maintenance Program
- ☐ Hold Pre-Job Pre-Con Turn-Over Hand-Off Meeting
- ☐ Monthly All Crew Team Meeting
- ☐ Regular Training Program

