

New Job Start-up Checklist

Job Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Job Number: \_\_\_\_\_\_\_\_\_\_

Job Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Start Date: \_\_\_\_\_\_\_\_\_\_\_\_\_

Account Manager: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Foreman: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. **Prior to Start of Job**
* Map of job location (e.g., Map Quest, GPS coordinates)
* Copy of site map (e.g., backflow, controllers, concerns, key office locales)
* Tree inventory (e.g., species, quantity, location, condition of each)
* Job specifications (e.g., turf, slopes, shrubs, irrigation, trees)
* Initial job walk completed (e.g., job quality, safety hazards, client priorities)
* Job estimate based on manpower, square footage, site tasks; gross margin goals established
* Photographic documentation (i.e., 5 photographs per $1,000 contract value; “before” photos)
* Completed customer registry (e.g., names, phone numbers, e-mails, contact hierarchy)
* Signed contract
* Finalized new Job start-up plan (e.g., rotation map, communication, crew configuration)
* Thank you note sent to appropriate contacts
* Introduction letter sent to appropriate contacts
1. **Office Administration**
* Establish new job file
* Populate job file with all documentation (e.g., contract, client sheet, photographs)
* Scan all documents onto electronic network for back-up and security purposes
* Prepare welcome letter and certificate of insurance
* Ensure three (e.g., owner, Account Manager, Office Manager) personal contacts with client
* Billing procedures, service requests, and customer service processes are finalized
1. **Within First Week on the Job**
* First phase (i.e., 30-day priorities) of new job start up plan have been completed
* Functional areas (e.g., chemicals, irrigation, clean-up) are established
* Initial job site safety inspection has been completed
* Weekly routing schedule has been reviewed and revised
* Project Manual (e.g., initial enhancements, plan revisions, rotation map) is developed
* Account Manager and Foreman walk the entire job
* Account Manager contact client on at least two occasions
1. **Within First Month on the Job**
* Review Project Manual with multiple client contacts
* Review safety evaluation with multiple client contacts
* Job sequencing is revised to ensure job quality and gross margin goals can be achieved
* Initial walk-through with client occurs
* Proposals, notes, and e-mails are stored in the job file
* Attendance at board meeting, client meeting, or residential meeting is scheduled
* Photographic documentation is collected; “after” photos
* Plan is determined for upcoming seasonal adjustments (e.g., labor, chemicals, color)
* Owner contacts client personally
* Client Relations Management process begins to take shape
* Entire new job start-up process is reviewed to improve efficiency, quality, and value