# The Project "Hand-Off Process"

## Topic Identification

Have you ever started a new project and had the sensation that everything was spiraling out of control or things were moving very fast, that you could not catch up with a specified schedule or construction processes of a major project? This could be the result of poor project start-up preparation, specifically a poor "hand-off process" between an estimator and another individual, such as a foreman or a project manager who will run a project. The construction industry is an industry that requires and demands fast action to complete the work. In trying to please our clients by showing that we can respond to their needs, we often overlook the time it takes to prepare for a new project. Would you ever play an athletic contest without some type of preparation or formal gathering to determine a "game plan"? If not, then you should never enter into the "game of construction" without a solid plan of attack. An organized official hand-off meeting between and estimator and the project manager and or project foreman will pay dividends later as the project progresses.

## What the Problem Effects

Poor project hand off meetings or lack of them will result in un-profitable jobs. One can expect initial confusion over scope of work, overall project budget, and an unclear vision or understanding of how work will be phased and completed. Workers in the field will appear confused and unorganized to deliver a quality product in a timely and profitable manner. The overall project budget will experience cost overruns in both labor and material. The equipment rental or equipment usage budgets will have overruns because workers will consume more time completing various tasks. Poor workmanship may arise because work may be performed too quickly without regard to quality in order to meet specific construction schedules or timelines. Critical product detailing or installation procedures may be compromised in lieu of staying on time. Later, after the project is complete other possible warranty issues may arise and possible litigation because of a lack of attention to detail during the project. Finally project progress billings and held retention monies will either be delayed or not paid in full. All these aspects cost money and effects cash flow. The amount of money lost or delayed is magnified by the size of your company and how many people you have working under these conditions.

## How Managers and Leaders Contribute to the Problem

Owners and estimators of small construction firms often wear many hats and are too busy to be attentive to detail. We try to complete all the tasks ourselves without having special systems or processes in place to complete the work. Many times we try to keep all the processes and all the thoughts of a project in our heads or we do not take the time to train others to help us with these tasks. Sometimes we do not trust others to do what we do, so this will causes us to try to do everything ourselves.  Over time this will lead to administrative chaos, wasted time and energy, and unnecessary stress and frustration within a company. It will also lead to poor performance in the face of your client. We find that we cannot meet deadlines and we make too many promises we cannot keep.  As owners of companies small and large, we need to establish systems which help us run projects. We need to learn to delegate and train others to help us execute the processes. As we do this we can oversee and administrate all involved to make sure we stay on task.

## Brainstorm Solutions, Paths, and Processes

Even as a small company where one person may estimate, project manage, and complete other administrative tasks, you should think forward and set up internal systems or processes for your company as if you were to hand off or delegate some of these duties to other employees.  In this case, a regimented "Project Hand-Off Meeting" routine will allow new projects to be set in motion properly for the best profitable results. *(See attached form for a sample of a project hand-off meeting agenda and checklist)* Even if you are an owner who is running the project from estimate through billing, you can create a process for yourself to prompt and/or remind you to complete a specific task. Writing down specific tasks keeps you in check with what needs to be done and also offers you a set of project goals and some internal expectations to meet. In the long run, this format can be refined and possibly improved upon when seen in written form by you or other future employees.

## Implementation Plan

One step needed to resolve this problem would be to develop a form and set a specific format to review all projects prior to the initial work. Next, set a company policy that no work is to be started without some form of paperwork and project outline. It is common practice with many small construction subcontracting firms to complete work without proper organized bids, executed contracts, or other imperative organizational paperwork. This is especially true with last minute jobs. If you are a single owner/worker in a small company, organize a checklist of items to complete prior to starting a job. In the future, the checklist would allow a new hire or assistant to physically see and better understand the thought process which you utilized prior to starting a project.

## Delegation of Tasks

As there are several different construction trades, there will be opportunities for several types of hand-off meeting checklists and agendas. You can use one of our templates or develop your own designed specifically for your trade. When developing you own, you need to get all those involved in the process to give input on what would make up a complete hand-off meeting agenda. If you are a firm that has several employees or office personnel, identify a person(s) to take on the responsibility of developing the hand-off meeting agenda. Generally, there will be a few people involved including the estimator, the project manager and/or the superintendent. You can invite others to participate depending on the size of your internal administrative staff .

## Reporting and Follow-Up.

Whoever is assigned to develop the meeting agenda and checklist should report to you in a specified time frame to show you the results.  Then put the new system in place and monitor to make sure it is working. Some tweeking and adjustments may be necessary as the system is being worked.

## Evaluation-

Once a year, company stakeholders, administrative staff and other team members need to meet in order to discuss the effect and effectiveness of company procedural and policy changes. What can be done to even further improve existing procedures and processes? What new systems need to be put in place? Constant evaluation and improvement is the goal to all new systems or procedures.

**Problem Identification:**

No "Hand-Off Meeting" at the start of a new project

**What the problem affects:**

- Overall project scope of work
- Excess labor and extra workforce scheduling
- Workforce confusion
- Overall cost overruns in labor, material or equipment usage
- Inability to deliver the product in a profitable manner
- Poor workmanship
- Warranty issues
- Delayed billing payments
- Stress on company cash flow due to late payments and due to poor profitability

**How we contribute to the problem**

- We do not delegate responsibility to others effectively
- We do not effectively train others to help us with various tasks
- We are too busy to organize or develop a system or hand-off checklist
- We keep all the tasks in our heads
- We do not trust others to do our work
- We fail to effectively train others

**Brainstorm solutions, paths, and processes**

- Plan to eventually have employees
- Develop a system and agenda for a hand off meeting not only for yourself but for those who may be involved in the company later

**Implementation plan**

- Set up a company policy that no work will be started until this checklist and meeting have been fulfilled
- Develop a plan yourself or get those involved to help identify a detail check off list and meeting agenda

**Delegation of tasks**

- Use one of our templates or develop you own hand off meeting agenda
- Get those involved in the process to help develop the template

## Reporting and Follow-up

- Delegate a person to report back within a specified time
- Evaluate the new system once put in place for small adjustments

## Evaluation

- Over time evaluate the system to see if it needs additional adjustments

# Project Hand-off Meeting Checklist and Agenda

Project Name _____

Date of Hand-off Meeting _____

**Management involved in the project:**

Estimator _____

Project Manager _____

Project Foreman _____

Internal Administrative Assistant #1 _____

Internal Administrative Assistant #2 _____

Safety Manager _____

Material Purchase Manager _____

## Overview of entire project

**Estimator and Project Manager or Foreman meeting**

_____ Identify scope(s) of work contracted

_____ Review project plans with those involved

_____ Review Project budget and bidding philosophy of each section awarded

_____ Review any all budget conditions of the project. i.e. materials, equipment, special

labor requirements, etc.

_____ Review Contract and all inclusions and exclusions

_____ Review any special paperwork necessary for project completion

__ Extra Work Authorizations forms

__ Change order forms with detailed pricing

__ Monthly billing and % complete forms

_____ Identify all appropriate project contact names and numbers

_____ Identify all submittal requirements

_____ Identify all material pricing and lead times and other special conditions

**Project Manager and Internal Administrative Meeting**

_____ Discuss internal and job procedures

    __ Setting up overall and specific file folders for the project

    __ Adding project to various internal financial spreadsheets, ie work in progress

    __ adding project to monthly project billing cycle reminder list

_____ Discuss all billing procedures

_____ Discuss all insurance form checklist and other procedures

_____ Discuss any special wage rate forms and procedures