

04 how the work gets done

Print or fill in.

Form 04: how the work gets done

Best answered by: whoever actually does the work, not whoever sells it **Time:** 45 minutes **Fills:** all four files in delivery/

This is the most important form here and the one most often given to the wrong person. A salesperson describes how the work is supposed to go. Someone doing it describes how it goes.

Describe what really happens, including the informal parts and the shortcuts. Nobody outside the business reads this.

Completed by: _____ · Role: _____ · Date: _____

Start to finish

Walk through a {{THE_WORK}} from the moment it is agreed to the moment it is finished and paid. Add or remove steps as needed.

1. 2. 3. 4. 5. 6. 7.

How long does a typical one take? And a bad one?

What sets the pace: your time, materials, weather, a third party, or the {{CUSTOMER_WORD}}?

Which role handles which step?

Before you can start

What has to be true? Access, deposit, materials, permit, weather, a signed agreement.

What happens when you start anyway without one of those?

Where it goes wrong

Which steps slip most often, and why? Be blunt.

What do you do when they do? Who gets told, how fast, and who decides?

Different kinds of work

Does a small one follow a different path from a large one? Describe both.

What gets skipped on a rush or emergency job, and what does that cost you?

What you hand over

What does the {{CUSTOMER_WORD}} end up with? Include paperwork, certificates, warranties and instructions.

What good looks like

What separates acceptable work from good work in your trade? Be concrete. Give numbers if there are numbers.

What gets checked, when, and by whom?

Check	When	Who	What passing means

What outside standards do you work to? Codes, regulations, manufacturer specifications, certification schemes. Include the year or version.

What would you never sign off, whatever the pressure to get finished?

Who decides a {{THE_WORK}} is done? Is the {{CUSTOMER_WORD}} part of that?

What happens when work does not meet the standard and it is found late?

Do you count anything? Callbacks, rework, complaints, inspection results.

Scheduling

How is work scheduled? Name the actual system, including the informal one people really use.

How far ahead are you booked? How much does that move through the year?

Busiest period, quietest period, and what drives each?

What breaks when you are at your busiest?

Do you take emergency work? What does it cost, and what gets displaced?

Who can commit to a date? Who can move one?

What causes delay most often?

How much notice does a {{CUSTOMER_WORD}} get when a date moves?

Finishing

What exactly does "finished" mean?

Does someone walk the {{CUSTOMER_WORD}} through the completed work? If not, why not?

What state do you leave the site in?

When does the final invoice go out?

What is the warranty or guarantee, and what voids it?

What do you record about a finished {{THE_WORK}}, where, and for how long? Photos, measurements, serial numbers, what was actually installed.