

# **Job Manager Project Plan**

## **Phase I Customer Information Session**

### **Review field notebook composition** **DM/JM Field notebook RFI search**

**Intent:** Validate comprehensive field notebook  
Review FN for submittal questions

- a. Void dated information
  - b. Documents in the correct categories
  - c. Documents in chronological order
  - d. Request color selection
  - e. Stone type
  - f. Proposed ship dates?
  - g. Review project notes for timeline and RFIs
  - h. Review plan review doc.
  - i. Prepare questions for Customer Information Session (CIS) - deliverable
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### **Customer Information Session 1**

**Intent:** Communicate client responsibilities  
Communicate SL's responsibilities  
Gather scheduling/sequencing requirements

1. **Job Manager Introduction**
    - a. Introduce yourself as JM
    - b. Communicate your role and responsibility
    - c. Provide phone number
  2. **Client Appreciation**
    - a. Thank client for their business
  3. **Project Plan Review**
    - a. Commercial/Residential
    - b. Validate Unit(s)
    - c. Validate Unit Volume
    - d. Validate Unit location
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### **Project Scheduling**

**Intent:** Gather scheduling requirements  
Set client expectations

- a. Request clients estimated stone delivery
  - b. State requests forwarded to scheduling committee for scheduling
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## **Product Sequencing**

**Intent:** Identify client stone shipment order preferences

- a. Verify Project Phase
- b. State Job Manager breaks down project in logical groups
- c. Identify any special ordering of units (attempt but not promise to fulfill)
- d. Provide info to DM for submittal scheduling process
- e. Sequencing confirmation( ~a week)

**Note: *SL sequencing logic***

- a. produce units from the ground up
  - b. don't break up product groups
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## **Submittal Process (Shop Drawings)**

- a. State the scheduling process begins only after the return of the signed submittal
  - b. State that on time submittal returns to ensure reservation of production schedule
  - c. State that a delay in the return can extend ship date
  - d. State I will call you three days Job Monitoring (I will call and remind you)
  - e. Communicate
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## **Change Management Process**

**Intent:** Communicate SL's procedures for modifying scope

- a. State modifications to original bid are handled by a change order
  - b. Explain time impact of bid modification
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## **JM/DM Product Scheduling**

- a. Meet with DM to Complete Job Manager Coordinator Evaluation Form(JM&DM)
  - b. Provide submittal/scheduling notes from CIS to DM
  - c. Develop submittal Schedule
  - d. Communicate estimated ship date to client
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