

Pull Through Work Follow Up & Repair

Notification of New Work

First Contact		Identify / Validate Customer		
Call in	New	Existing No Agreement	Pull Through Work	
Online engagement	Collect customer information	Check history	Notify the account manager	
Walk in	Billing information	Update / verify existing information		
BMS (Building Management System)	Verify customer ability to pay	Credit check integration		
Request intake and tracking system	Customer information entry forms	Payment history verification tool		



Assessment

Collect Initial Work Description	Validate Work	Determine Priority / Severity	Determine Who Should Lead Effort	Customer Approval of Terms
Type of work	Within our service offering	Check for life health safety issue	Previous work history	Send customer copy of terms
Customer description of work	Location within the service area	Check for increasing levels of damage	Special Equipment required	Rates schedule
Contact info. for on site lead	Should we refer to others	Important Ex-Customer or opportunity	Special training or certifications required	Approval Confirmation
Work request description tool	Service scope evaluation tool	Priority and severity assessment tool	Location & geography considerations	Customer communication log
Customer communication log	Geographical coverage checker	Emergency work flagging system	Work history and team matching system	Rates and service terms generator
			Technician certification tracker	

Emergency

Expedited Plan / Dispatch

Brief Technician / Lead	Pull Tools & Materials	Verify Arrival Logistics	Dispatch to Location
Review work description	Prepare Tools & Materials	Double-Check Site Access	Provide customer with ETA
On site contact information	Access & Parking	Verify Parking & Unloading Areas	Update Customer if Delayed
Clarify Job-Specific Needs	Check Material Availability	Communicate Special Site Conditions	Confirm Technician Departure
Work briefing and information tool	Tool and material procurement system	Logistics verification and coordination tool	Technician dispatch and tracking tool
On-site contact coordination system	Access and parking coordination tool	Site condition communication tool	Customer ETA notification system

On Site Planning

Check-In at Location	Receive on Site Briefing	On Site Discovery	Finalize Fix Plan	Customer Approval to Begin Work	Obtain / Procure Resources
Establish onsite contact	Verify situation as is reported	Determining temp execution & severity / timing	Determining additional tools or materials required	Informed customer of plan	Materials / tools
Verify security & safety information for location	Establish clear expectations	Record existing situation	Estimated duration of repair	Written approval (if necessary)	Additional labor
Review Emergency Procedures	Identify New or Additional Issues	Safety assessment/ make safe (Safety Pre-task Plan)	Assign Non-Critical Work to Follow-Up Teams	Record existing situation	Permits certifications or approvals
On-site contact and check-in tool	Situation verification and alignment tool	Safety assessment and documentation tool	Fix plan revision tool	Customer approval and authorization tool	Material procurement and tracking system
Safety protocol verification system	Client briefing and expectation setting system	Condition recording system (photo/video)	Resource allocation system	Plan presentation system	Permit and certification management tool

Closeout Repair

Document Repair	Address Deviations from Fix Plan	Check out with Client	Check out with Dispatch	Invoicing
Completion documentation	Record plan deviations	Get confirmation signature	Job completion notification	Close out PO
Photo documentation	Communicate Changes to Stakeholders	Follow-up instructions	Update service records	Apply labor to the job
Archive Documentation	Analyze Causes of Deviations	Future contact information	Prepare Follow-Up Report	Tool charges
Completion documentation system	Plan deviation recording system	Client confirmation and signature tool	Job completion notification system	Invoicing and PO closure system
Photo and data archive tool	Stakeholder communication tool	Follow-up instruction generator	Service record update tool	Labor and material tracking tool

Emergency



Project Planning

Hand off to Project Planning	Plan Development	Estimate Development	Customer Briefing & Approval	Permits & Approvals	Procurement Materials	Preliminary Scheduling
Provide Intake Information	Break down repair to task list	Repair cost itemization	Repair plan presentation	Permit requirements identification	Material needs listing	Client time coordination
Assign PM or Tech	Risk / safety assessment	Drafting of detailed quote	Client feedback integration	Permit application filing	Supplier selection and engagement	Scheduling notifications setup
Work detail transfer tool	Determine needed resource allocation	Contingency considerations	Approval documentation	Repair compliance check	Materials ordering process	Internal Resource Coordination
Project handoff and team assignment system	Create initial schedule	Sub contractor considerations	Outline of next phases	Permit status updates	Inventory tracking system	Client scheduling coordination tool
	Task list generator	Cost estimation tool	Approval documentation tracker	Permit application and tracking system	Inventory tracking system	Notification system for schedule changes
	Risk and safety assessment tool	Subcontractor and contingency planning module	Customer plan presentation and feedback tool	Regulatory compliance checker	Material procurement and supplier engagement system	

Dispatch

Warehouse Notifies Dispatch Job Ready to Schedule	Verify Arrival Logistics	Dispatch to Location
Material loading protocol	Parking & access	Technician dispatch protocol
Equipment and tools check	Establish onsite contact	Site arrival confirmation
Material and tool readiness tracker	Verify security & safety Information	On-Site resource handoff
Job scheduling notification system	Environmental considerations	Technician dispatch and tracking system
	Logistics verification and coordination tool	ETA notification tool for customer communication
	Parking and access confirmation system	

On Site Planning

Mobilize at Location	Review on Site Safety	Document on Site Conditions
Verify correct tools and materials	Complete safety check list	Initial site review and recording
Prepare the Work Area	Communicate Safety Plan to Team	Recording and Logging Data
Work area preparation checklist	Site safety review and compliance tool	On-site condition recording tool
Tool and material verification system	Team safety briefing module	Photo and document logging system

Execute repair

Secure / Connected Systems	Execute Work	Charge / Reconnect Connected Systems	Test System	Clean Up / Demobilize	Look for Additional Work or Maintenance
Expectation of down time	Repair task execution	System Re-connection protocol	Operational testing procedures	Site clean-up operations	Additional work identification
Fire watch & inspection	Ongoing work documentation	System charge verification	Performance criteria checklist	Demobilization & equipment retrieval	Client consultation on findings
Note shutdown time	Coordinate with Team	Monitor for Issues	Document Test Results	Final Site Inspection	Prepare Follow-Up Report
Fire watch and downtime tracking system	Task execution and progress tracking tool	System reconnection checklist	Operational testing procedure tool	Site clean-up and inspection checklist	Additional work identification tool
System shutdown and inspection coordination tool	Ongoing work documentation system	Post-repair charge verification tool	Performance criteria checklist	Demobilization tracking tool	Client consultation and follow-up system