

# Maintenance Agreement

## Opportunity for Agreement

Detect Opportunity (Sources)		New	Existing No Agreement
Other trades	Bid public	Collect customer / project information	Check history
Pull over	Bid private	Validate opportunity	Update/ verify existing information
Third party opportunity	Direct customer contact	Track For Follow Up	Customer Data verification /update system
Opportunity tracking and prioritization system		Customer Information form	Historic Data Review Tool
Opportunity identification resources		Validation check	



## Agreement Planning

Assign (Account) Manager	Conditions Assessment	Maintenance Inventory Creation	Create SOW	Cost Estimate / Budget	Generate Agreement	Submit
Review available account managers	Collect inventory-specific documentation	Document maintenance inventory	Determine maintenance schedule	Establish material costs & responsibilities	Create Formal agreement	<b>Submission Approval or Rejection</b>
Assign the account manager	Verify Critical equipment and tasks	Collect inventory specific documentation	Finalize scope of work	Estimate Labor Based on Tasks and responsibilities	Establish duration of agreement	Submission Tracking System
Hand off opportunity key information	Location safety assessment	ID missing maintenance documents / procedures	Define party responsibilities	Define not to exceed values	Finalize agreement details & terms	
Manager workload overview	Look for replacement opportunities	Critical equip/tasks	Establish protocols & procedures	Review addition fees, inspection certification	Legal Review	
Manager assignment tool	Visual documentation capture	Inventory documentation tool	Maintenance schedule planner	Material cost calculator	Agreement template library	
Manager assignment tool	Site assessment and risk analysis	Critical equipment prioritization	Scope of work definition tool	Task list generator	Agreement Wizard or Directed Process	
				Estimating Report Template	Legal guidance	

## Agreement Kick Off

Hand Off to Lead	Create / Detailed Project Plan	Assign Manpower & Subs	Kick Off Briefing
Review agreement	Update agreement information	Identify resources	Project overview
Customer introductions	Generate final tasks list	Confirm availability	Review critical processes or procedures
Project information summary tool	Update schedule & milestones	Allocate manpower	Overall safety briefing
User Roles to control sharing	Task list generator	Coordinate schedule	Roles responsibilities & contacts
Schedule and milestone updater	Resource identification tool	Manpower allocation system	Project overview presentation /dashboard
			Safety module

## Maintenance Cycle

Review upcoming tasks	Generate Parts & Requirements List	Purchase/ Ready Materials & Tools	Queue to Schedule	Assign Technician	Dispatch & Perform Maintenance	Survey for Deficiencies & Improvements
Ongoing Focus						
Relationship Building		Communicate Updates and Escalation to Incorporate in Agreement		Offer Upgrades and Enhancements		
Refer to "Expedited Planning / Dispatch" for Emergency Work						
Close Out Work Order	Validate Outstanding Quotes	Update Condition Assessment	Modify Maintenance inventory	Update Tasking	Document Maintenance & Deviations	

## Close Agreement

Agreement close out prep	Close Agreement	Archive Agreement
Compliance check	Close out final billing	Gather documentation
Identify outstanding issues	Closure confirmation	Archive Project
Final service delivery	Deficiency identification tool	Service documentation collector
Compliance check system	Improvement plan generator	Invoice finalization too
Issue tracker		

## Establish Market Presence

Market Research	Branding & Positioning	Marketing & Promotion	Networking & Relationships	Lead Generation	
Identifying target markets	Developing brand identity	Digital marketing	Industry engagement	Inbound marketing	Referrals
Competitor analysis	Value proposition	Traditional marketing	Partnerships & alliances	Pull through	Existing customer
Service demand analysis	Brand messaging	Content marketing	Customer referrals	Follow up information from other work	Customer engagement and relationship management system
Market segmentation and analysis tool	Brand identity creation toolkit	Multi-channel marketing campaign manager	Referral tracking and management system	Inbound marketing and lead capture system	
Competitor benchmarking system					

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Evaluate Tasks	Identify all materials	Purchase or pull Materials/ Tools	Prioritize and assign tasks	Identify qualified technician	Coordinate dispatch	Conduct site survey	Confirm task completion	Review outstanding quotes	Reassess condition	Review inventory levels	Review completed tasks	Record maintenance activities
Communicate next steps	Verify availability materials	Confirm completeness of list	Communicate schedule	Verify availability	Ensure access to resources	Document and prioritize findings	Finalize documentation	Follow up with vendors	Document changes	Adjust inventory	Adjust upcoming tasks	Ensure accurate documentation
Adjust Schedule	Generate comprehensive list	Prepare tools/materials	Adjust Schedule if needed	Provide documentation /tools	Execute maintenance tasks	Communicate results	Archive work order	Adjust project budget	Communicate assessment	Document changes	Communicate task updates	Communicate deviations
Update task tracking	Parts/materials identification tool by task/Equipment	Address any issues or delays	Task prioritization tool	Monitor progress and support	Document deviations/issues	Develop improvement plan	Communicate completion	Communicate updates	Inform future planning	Coordinate procurement	Record in project system	Inform future cycles
Task summary and tracking system	Material and parts reporting	Purchasing Module	Schedule communication or dispatch module	Technician qualification matcher	Technician dispatch system	Deficiency identification tool	Task completion confirmation	Outstanding quote review system	Condition reassessment tool	Inventory level review tool	Task completion updater	Maintenance activity logging
Dynamic schedule		Warehousing and Inventory Module		Technician progress monitor	Maintenance task execution tracker	Improvement plan generator	Work order archiving tool	Vendor follow-up tool	Condition change documentation	Inventory adjustment system	Task update communication	Deviation communication tool

## Ongoing Focus

Relationship Building	Communicate Updates and Escalation to Incorporate in Agreement	Offer Upgrades and Enhancements
Engage with customers	Update stakeholders	Identify upgrades
Strengthen relationships	Escalate issues	Present options
Identify new opportunities	Incorporate changes	Coordinate integration
Document interactions	Document communications	Document changes
Customer engagement tracker	Stakeholder update notifications	Stakeholder update notifications
	Agreement change management	Agreement change management