Project Manager Responsibilities and Procedures

Project startup for large projects ($10,000.00 or larger)

1) Estimator to determine if we are going to receive: contract, PO, letter of intent or signed quote. Estimator to provide instructions to PM how and/or when to proceed

2) Estimator / Sales to assign project(s) to PM (project manager) and establish timing of project with PM

3) Estimator to write up job in Fabsuite

4) PM to initiate meeting to receive and review with estimator or sales:
   Full set of plans – (bid set and current set) electronic set to put into Fabsuite
   Specs
   Estimate - including any takeoffs
   Commitments that Sales made to customer on scheduling
   Schedules – if provided to Sales during quoting process
   Variances from plans and specs agreed to by customer and Sales in negotiations
   Contract
   Addendums
   Notes or emails from quoting process
   Review schedule of values

5) PM to review and be familiar with construction documents
   Cursory review prior to contact with thorough review to follow

6) PM to contact with customers rep and / or site superintendent – within 2-3 days
   "Manage customer’s expectations”
   Confirm scope and expectations with customer

7) PM to establish level of communication on project (what is latest set and how will we receive updated plans and specs?)
   Formal – RFI’s, Change orders, Transmittals, etc
   Informal – emails, verbal communication
   Phone conversation – email summary of pertinent information

8) PM to complete Fabsuite project setup (See Fabsuite checklist for specifics)
9) PM to review contract and / or purchase order including:
   - Scope
   - Amounts
   - Schedule
   - Terms and Conditions
   - Change orders
   - PM to sign contract
   - Lawyer to review large job contracts above $???

10) PM responsible for ensuring all documents are entered into Fabsuite: plans (bid set, current sets etc.), specs, pictures, emails, etc.

11) PM to establish internal project plan and schedule and set up kickoff meeting

12) PM to set up GIS kickoff meeting (required for large jobs). Additional meetings may be required. A formal agenda is to be followed in the kickoff meeting. Address bottlenecks, dependencies, risks and contingencies in order to mitigate risks.
    PM to provide job info to attendees prior to meeting (preferably 1-2 days ahead)
    PM to provide printed plan at meeting
    Attendees to include:
       - Detailing
       - Fabrication – Shop foreman
       - Erector
       - GIS erect
       - Outside erecter – when convenient
       - Sales
       - Shipping (if required by scope of project)
    Items to discuss at meeting:
       - Sequence and schedule
       - Specific details
    Summary of meeting to be put in Fabsuite (notes and comments)

13) PM to review results of kickoff meeting with customer if customers or suppliers expectations will change as a result of the meeting

14) PM to release and write up Purchase Orders to subcontractors:
    - Detailers – outside sources
    - Erectors (to be done within week of job write up)
    - Joist and Deck suppliers (to be done within week of job write up)
    - Suppliers with lead time – painting, rolling etc.

15) Monitor critical path issues

16) Reoccurring duty – check in with customer on regularly scheduled intervals
**Task Management**

PM responsible for:
“Manage customer’s expectations”
Change orders – cost impacts and or / schedule delays
RFI’s
Transmittals and follow up
Shipping
Scheduling
Site mobilization
Erecting
Monitor GIS dashboard

**Project Closeout**

PM responsible for:
Invoicing
Closeout documents – (Fabsuite)
Be prepared to discuss project at monthly meeting (Power BI)
Final contact with customer