MotionOps

CONTRACTOR SCALER HUB · HIRE, ONBOARD AND GROW CREW LEADERS

Crew Lead Responsibilities

Lesson 4 of the course. Fill this in with the crew lead, not for them: the responsibilities adapted to your trade, the decision limits with your own numbers, and the training stage they start at. Keep a copy each; it is also the job post the next time you hire a lead.

CREW LEAD	CREW
LEAD SINCE	TRAINING STAGE TODAY (1 TO 4)
PAY STEP THAT GOES WITH THE ROLE	90-DAY REVIEW DATE

1. Who's ready

Tick what the person already does. Four of the six can be trained into the rest.

- [ ] Shows up prepared and notices when the crew isn't
- [ ] Tells you about problems before you find them
- [ ] Explains things to newer crew members without being asked
- [ ] Speaks to customers comfortably and doesn't overpromise
- [ ] Keeps their photos and hours current without reminders
- [ ] Follows the standard even when a shortcut would be faster

A superb craftsman with none of the six has a place too: the senior tradesperson who sets the quality bar, paid for skill, without the lead's responsibilities. Say so, and keep both roles real.

2. Responsibilities, adapted to your trade

Keep the seven areas; change the details.

Area	Crew leader responsibilities	In our trade
Readiness	The afternoon before: materials on site or on the truck, access confirmed, instructions read, crew knows the start time. Nothing waits for a 7 a.m. phone call.	

Area	Crew leader responsibilities	In our trade
The day's plan	A five-minute morning briefing: what gets done today, who does what, what "done" looks like, any safety point specific to the site.	
Quality	Checks work against the standard (the job checklist, the drawings, the proposal) before moving on, and before the customer sees it.	
Customer on site	Greets, explains what happens today, answers routine questions. Scope and price questions go to the office: "I'll have the office call you."	
Documentation	Photos before, during and after; hours for the crew; a short end-of-day status with any blocker. Every day, without being asked.	
Decisions and escalation	Decides routine matters within set limits (section 3). Passes everything else up quickly, with the facts.	
The crew	Sets the tone, coaches on the job, deals with lateness and quality the same day, trains new members per the onboarding plan.	

Safety sits across all of it. Your trade, your state and your insurer set the training and the rules; the crew leader makes sure they're followed on site every day.

3. Decision limits

Example limits from the lesson. Write your own numbers in the last column, with the lead.

Situation	Crew leader decides	Escalates to the office or owner when	Our limit
Order of today's tasks	Yes	It changes what gets finished this week	
A small material shortfall	Picks it up or sends someone, up to a spending limit you set, and logs it	Over the limit, or a product substitution the customer would notice	Spending limit: $
Customer asks for a small extra	Says yes only if it's on your pre-approved list of courtesies; otherwise documents it and routes it as a change request	Anything that adds cost or time. The lead never prices it	
A crew member is late or leaves early	Handles it that day, tells the office for the timesheet	It's the third time, or pay is affected	

Situation	Crew leader decides	Escalates to the office or owner when	Our limit
Site condition not as expected (hidden damage, access blocked)	Stops that part of the work, photographs it, calls	Always escalated; the lead's job is to escalate it fast and well	
Customer disputes what's in scope	Stays polite, doesn't argue, doesn't concede	Always. Same day, with photos and the proposal page	
Weather or a no-show changes the day	Reorganizes the crew on site	Another crew or another job is affected	
Safety hazard	Stops the work. No limit, no permission needed	Reports it the same day	

OUR PRE-APPROVED LIST OF COURTESIES

ESCALATE TO (NAME)

HOW: CALL, TEXT, WITH WHAT ATTACHED

4. A good escalation has four parts

WHAT HAPPENED

WHAT IT AFFECTS: TIME, COST, CUSTOMER

WHAT I'VE ALREADY DONE

WHAT I NEED DECIDED

Example, made up: a kitchen lead finds two filler panels missing: she sends a crew member to the supplier, logs the trip and carries on, inside her limits. At ten the homeowner says the proposal "obviously included" moving the pendant lights, which it didn't. She doesn't argue and doesn't move them: she photographs the ceiling, texts the office with the proposal page, and tells the homeowner the office will call before noon. "Hey, there's a problem at the Millers'" is not an escalation.

5. Train the lead in four stages

Stage	What the trainee does	What you do	Move on when	Date reached
1. Shadow (1 to 2 weeks)	Runs the readiness check and the morning briefing with you watching; you make the decisions and explain each one aloud	Narrate: why this task first, why this is a change order, why you called the office	They can predict your decisions before you make them	

Stage	What the trainee does	What you do	Move on when	Date reached
2. Run it with you on site (2 to 4 weeks)	Makes the routine decisions; you're there but don't step in unless safety or scope is at risk	Review every decision at the end of the day, 10 minutes	A week passes with no decision you'd have made differently inside the limits	
3. Run it with you on call (1 to 2 months)	Runs the crew alone; calls for escalations	Answer the phone fast; review the week's decisions and escalations in a 15-minute weekly one-to-one	Escalations are the right ones, and the daily status arrives without reminders	
4. Owns the crew	Full responsibility within the written limits	Weekly one-to-one; monthly review of the crew's jobs: schedule hit, rework, customer feedback	Ongoing	

The limits widen over time. Write when and why:

Limit	Week one	Month six
Spending limit		
Courtesy list		
Scheduling latitude		

6. The weekly one-to-one: 15 minutes, their agenda first

WHAT SLOWED THE CREW DOWN

A DECISION THEY WEREN'T SURE ABOUT

WHAT THEY NEED

YOUR ONE PIECE OF COACHING (NOT A LIST)

7. Make it a real role

- [ ] The responsibilities list, adapted to your trade, in writing
- [ ] The decision limits, in writing
- [ ] The pay step that goes with them, in writing
- [ ] All three reviewed at 90 days and once a year
- [ ] What you provide agreed: the standards, your availability on call, the weekly one-to-one

What to review each month

- [ ] Routine decisions the lead handled alone, and how many came to you that shouldn't have
- [ ] Escalations: were they the right ones, and did they arrive with the four parts?
- [ ] The crew's jobs: finished on schedule, rework, customer comments, daily status completeness