

CONTRACTOR SCALER HUB · TOOLKIT

Hire, Onboard and Grow Crew Leaders

The course's checklists, worksheets and templates in one file: 4 to print or fill in on your phone, and 1 spreadsheet sent with it.

MotionOps

How to use this toolkit

One file per lesson of **Hire, Onboard and Grow Crew Leaders**, in the order of the course. Each starts with the lesson it belongs to and what to do with it. The tinted rows are the lessons' examples; your numbers go in the blank ones.

Use it lesson by lesson, or go straight to the one you need this week. Nothing here needs an account, and every file says when to check a number with an accountant, an attorney, your licensing board or an insurance agent.

Contents

1. **Org Chart and Role Scorecard**
   Construction Company Org Chart: Which Role to Hire Next
2. **Construction Interview Questions and Scorecard**
   How to Hire Construction Workers Who Show Up and Stay (Interview Questions Included)
3. **New Hire Onboarding Checklist**
   Construction Employee Onboarding Checklist: A New Hire's First 30 Days
4. **Crew Lead Responsibilities**
   Crew Leader and Foreman Responsibilities: What to Hand Off and How to Train Them
5. **Weekly Team Meeting Agenda and Action Log**
   Spreadsheet · weekly-team-meeting-agenda-and-action-log.xlsx

LESSON 1 · CONSTRUCTION COMPANY ORG CHART: WHICH ROLE TO HIRE NEXT

Org Chart and Role Scorecard

Lesson 1 of the course. Write the name of who does each thing today, not who is supposed to. Log one week of the owner's hours, pick the box to fill first, then write the role scorecard before you write the job post.

1. Your org chart, with names

- [ ] One box per outcome, even if the same person fills several
- [ ] A box two people share without a clear line is split in two
- [ ] **Nobody** written where it's true: collections, warranty calls and permit tracking often have no owner
- [ ] Every box with the owner's name marked **keeps** (needs the owner's judgment) or **could transfer** (repeatable with a written standard)

Role	Owns	Name today	Reports to	Keeps or could transfer
Owner	Direction, pricing policy, hiring decisions, large customers, cash			
Office coordinator or office manager	Phones and leads, scheduling, customer updates, permits and paperwork, invoicing			
Estimator or salesperson	Site visits, estimates, proposals, follow-up			
Operations lead or project manager	Active jobs: readiness, materials, crews, customer on site, change orders, closeout			
Crew leads	One crew's day: readiness, quality, time, photos, on-site decisions within limits			
Crew members	The work			
Bookkeeper	Books, payroll, bills, tax prep with the accountant			

Role	Owns	Name today	Reports to	Keeps or could transfer

Use the blank rows for boxes you split out, and for work that has no owner.

BOXES WITH THE OWNER'S NAME

OF THOSE, MARKED COULD TRANSFER

BOXES WITH NOBODY

BOXES SHARED BY TWO

2. One week of the owner's hours

Count from a week's calendar or your interruption log, not from memory.

Owner's box	Hours per week	Repeatable?	Written standard?	Keeps or could transfer
Example Scheduling crews and reacting to changes	9	Mostly	No	Could transfer
Example Customer status calls and texts	6	Mostly	No	Could transfer
Example Site visits and estimates	12	Partly	Yes (estimating standard)	Keeps
Example Ordering and chasing materials	4	Mostly	No	Could transfer
Example Invoicing and collections	3	Yes	Partly	Could transfer
Example Pricing decisions, hiring, large customers	5	No		Keeps

Example: a 14-person remodeling company, made-up numbers. Scheduling, customer updates, materials and invoicing add up to 9 + 6 + 4 + 3 = 22 hours a week, mostly repeatable, with no owner but the owner. An office coordinator who takes those four boxes gives back roughly 22 hours. The estimator box is the biggest, but it is the one the owner is best at and the one with a written standard already.

OWNER HOURS THIS WEEK, TOTAL

HOURS IN BOXES MARKED COULD TRANSFER

3. Which box to fill first

The role you need frees the most owner hours **and** has the clearest standard to hand over. It is rarely the role that's loudest.

Candidate role	Owner hours a week it takes	How much is repeatable?	Standard written down?	What happens to revenue if it stays with you?
Example Office coordinator: scheduling, customer updates, materials, invoicing	22	Mostly	No (invoicing partly)	Idle crews, delayed cash
Example Second estimator	12	Partly	Yes	Slow estimates lose jobs

Which title? Tick the line that is true today. The job post uses that title.

- [ ] **Office coordinator:** the owner's day is interrupted by the phone and the calendar
- [ ] **Office manager:** there is an office of two or more people, or admin work has no owner
- [ ] **Project manager or operations lead:** crew leads escalate to the owner daily, or jobs run in parallel across sites

BOX OR BOXES THE NEW ROLE TAKES

TITLE FOR THE JOB POST

4. The role scorecard

One page that says what the role is for and how you'll know it's working. The job post is a summary of it, and the interview questions come from it.

Section	Example: office coordinator
Example Purpose	Keep every job scheduled, every customer informed and every invoice out, so the owner can spend the day on estimates and jobs.
Example Outcomes	Every new lead spoken to the same working day. Schedule for next week set by Thursday noon. Invoice sent within two working days of completion.

Section	Example: office coordinator
Example Responsibilities	Answer calls and messages; qualify leads with the script; book site visits; build and adjust the schedule; send customer updates at the agreed points; order standard materials; send invoices and payment reminders.
Example Authority	Reschedule within the week with customer agreement; order standard materials up to a limit you set; answer routine customer questions. Escalate scope changes, discounts and complaints.
Example Capabilities	Clear on the phone and in writing; comfortable with scheduling software; calm when the plan changes; organized enough to run a checklist every day. Trade knowledge is useful, not required.
Example Reporting and support	Reports to the owner. Daily 10-minute check-in for the first month, then weekly. Written scheduling rules, the lead script and the customer update points, before day one.
Example Capacity assumptions	Takes about 22 owner hours a week: scheduling, customer updates, materials and invoicing. The owner's time goes back into estimates.

Your role scorecard

ROLE TITLE

REPORTS TO

PURPOSE: ONE SENTENCE, WHY THIS ROLE EXISTS

OUTCOMES: THREE TO FIVE RESULTS, EACH MEASURABLE

RESPONSIBILITIES: THE RECURRING WORK, AS A LIST

AUTHORITY: WHAT THEY DECIDE WITHOUT ASKING

ESCALATES: WHAT THEY BRING TO YOU

CAPABILITIES: WHAT THEY MUST ALREADY BE ABLE TO DO

REPORTING AND SUPPORT: WHO THEY REPORT TO, HOW OFTEN YOU MEET, WHAT THEY GET FROM YOU BEFORE DAY ONE

CAPACITY ASSUMPTIONS: WHAT THE ROLE TAKES OFF OTHERS, AND WHAT IT COSTS

- [ ] The standards the role depends on are written down (for a coordinator: scheduling rules, the lead script, the customer update points)
- [ ] The authority limits are decided. Narrow at first is fine; they have to exist

5. Can you afford the role?

Cost it the way you cost a job: wage plus burden, against the hours it returns. The labor burden calculator lesson shows how to get from a wage to the real hourly cost.

WAGE

REAL HOURLY COST, WITH BURDEN

OWNER HOURS A WEEK IT RETURNS

WHAT THOSE HOURS GO INTO: ESTIMATES, JOBS, COLLECTIONS

If the honest answer is that the freed hours would not turn into estimates, jobs or collections, the role isn't the constraint yet. Re-read the chart.

Before you post: employment classification, pay rules and hiring law differ by state and trade. Check them with your accountant or an employment attorney before you post the job.

What to review, a month after the hire

- [ ] Outcomes in the chart with no owner, or with two
- [ ] Tasks the new role should take over that are still landing on the owner a month in
- [ ] Owner hours per week in the boxes marked **could transfer**, against your week in section 2

LESSON 2 · HOW TO HIRE CONSTRUCTION WORKERS WHO SHOW UP AND STAY (INTERVIEW QUESTIONS INCLUDED)

Construction Interview Questions and Scorecard

Lesson 2 of the course. Fill in sections 1 and 2 once per role, from the role scorecard. Print sections 3 to 7 once per candidate: every candidate for the role gets the same questions, the same skills check and the same scorecard.

1. The job post: the first five lines

People read for three things first: what the work is, what it pays, and what the days look like. Include, in this order:

- [ ] **The trade and the work.** "Lead carpenter for residential remodels: framing, trim, cabinet installs, running a two-person crew." Not "construction professional wanted."
- [ ] **The pay range,** hourly or salary, and how reviews work. Some states require a range in the post; check yours
- [ ] **The schedule:** start time, typical hours, overtime expectations, travel radius, Saturdays or not
- [ ] **Requirements that are actually required.** Leave out the ones you'd waive for a good candidate
- [ ] **What they get:** tools and vehicle policy, benefits if any, training, a path to crew lead if that's real
- [ ] **How to apply, and what happens next.** "Text or call [number]. We reply within one working day and interview the same week."

Leave out: a long company history, "fast-paced environment," "must be a team player," and anything you can't deliver.

2. The hiring process, with a time limit on every step

Step	Owner in the lesson	Time limit	Done when	Your owner
1. Reply	Office coordinator	Same working day	Candidate has a phone screen booked or a polite no	
2. Phone screen, 15 minutes	Office coordinator or owner	Within 2 working days of applying	Four must-haves confirmed; interview booked or closed	

Step	Owner in the lesson	Time limit	Done when	Your owner
3. Interview and skills check, 60 to 90 minutes	Owner or operations lead, plus the crew lead they'd work with	Within 5 working days of applying	Scorecard filled in by each interviewer	
4. References	Owner	Within 2 working days of the interview	Two work references reached, with notes	
5. Offer	Owner	Same day as references	Written offer with pay, start date, schedule and the 30-day plan	
6. Paperwork and day-one setup	Office coordinator	Before day one	Forms done, gear ready, trainer named	

SKILLS CHECK FOR THIS ROLE (SAME FOR EVERY CANDIDATE)

WHO RUNS IT

For field roles, see them work before you decide: a short paid working session on a real task, or a hands-on test at the shop (read a drawing, lay out a wall, wire a box, hang a door).

Before the first working interview: pay and local rules for working interviews vary. Ask your accountant or attorney how to run one where you are.

3. Phone screen, 15 minutes

CANDIDATE

DATE APPLIED

WHERE THEY CAME FROM (SOURCE)

PHONE SCREEN DATE

The four must-haves. A no on any of them closes it politely.

- [ ] Can do the hours and the travel
- [ ] Has the license or certificate the job needs
- [ ] The pay range is workable
- [ ] Could start on: _____

- [ ] Interview booked for: _____
- [ ] Closed, with a polite no

4. Interview questions

Same questions, same order, for every candidate for the role. Write down what they say: the last column is the evidence you score from.

Every field role	A good answer has	What they said
Walk me through your last job from the start of a day to the end.	A real routine: when they arrived, how they knew what to do, how the day ended. Vague answers mean they followed someone else.	
Tell me about a time the plan changed mid-day. What did you do?	They told someone, adjusted, and kept the customer informed, rather than improvising alone or stopping.	
Tell me about a mistake you made on a job. How was it fixed?	A real mistake, owned, and a fix. "I don't really make mistakes" is the wrong answer.	
What did you like least about your last job?	Honesty about something specific. Blame for everyone they worked with is a warning sign.	
What would your last crew lead say you're best at, and what would they say to work on?	Both halves answered.	

For a crew lead or foreman, add	A good answer has	What they said
A customer on site asks your crew to add something that isn't in the scope. What do you do?	Stop, don't start the extra work, document it, and get it to whoever handles change orders. Doing it to be nice is the expensive answer.	
How did you make sure your crew had what it needed the next morning?	A readiness habit: checking materials, access and instructions the afternoon before.	
Tell me about a time you had to escalate something. How did you decide?	A clear line between what they handled and what they passed up, and why.	
How did you deal with a crew member who kept showing up late?	A conversation first, a clear expectation, then follow-through.	
How did you report the day to the office?	Photos, hours, a short status, every day, without being asked.	

For an office coordinator or office manager, add	A good answer has	What they said
A customer calls angry because the crew didn't show. Walk me through the call.	Listen, find out the facts, give a time for the next update, then find out what happened. Not promising a fix they can't control.	
Two crews are double-booked for Thursday. How do you sort it out?	Check the rules (which job is time-critical, which customer was promised), propose a change, confirm with both customers, update the schedule, tell the crews.	
How do you keep track of fifteen open items in a day?	A system they can describe: a list, the software, a routine. "I just remember" is a no.	
Tell me about a process you improved at a previous job.	Something concrete and small is fine. Evidence they notice repeated problems.	

Questions to leave out: anything about age, family plans, health, religion, national origin or other protected characteristics. Beyond being unfair, they're unlawful in most places. If you're not sure a question is allowed, ask your attorney before the interview, not after.

5. Scorecard: right after the interview, before talking to the others

CANDIDATE

ROLE

INTERVIEWER

DATE

The criteria come from the role scorecard's capabilities and outcomes. Score 1 to 4; every score points to something the candidate said or did.

Criterion (from the role scorecard)	Must-have?	Evidence from the interview	Score 1 to 4
Example Runs a crew's day without being told	Yes	Described a daily readiness check and morning briefing at last job	4
Example Handles scope changes correctly	Yes	Would stop and call the office; couldn't describe documenting it	3
Example Documents the day		Photos and hours daily, by text to the office	3
Example Coaches crew members		One example, late arrivals, handled well	3

Criterion (from the role scorecard)	Must-have?	Evidence from the interview	Score 1 to 4
Example Skills check: framing layout		Clean, correct, slightly slow	3
Example References		Both confirm reliability; one mentioned friction with office staff	3

- [ ] Scored before discussing with the other interviewers
- [ ] Every score points to evidence, not an impression
- [ ] Must-have rows marked. **A 2 on a must-have is a no,** however charming the candidate
- [ ] Same questions, same test, same scorecard as every other candidate for the role

THE DECISION IN ONE SENTENCE (EXAMPLE: "STRONG ON THE DAY-TO-DAY, NEEDS TRAINING ON DOCUMENTING CHANGE ORDERS")

6. Reference checks: two work references, the same questions

REFERENCE 1: NAME, COMPANY, ROLE

REFERENCE 2: NAME, COMPANY, ROLE

Question	Reference 1	Reference 2
What did the candidate do there?		
Did they show up reliably?		
How did they handle changes and customers?		
Would you hire them again?		
What would you want me to know?		

A reference who answers only dates and title is telling you something too.

7. Before the offer

- [ ] Employee or subcontractor decided with your accountant
- [ ] Your state's hiring paperwork checklist from your accountant or an employment attorney, not copied from the internet
- [ ] Pay range checked against wage plus burden (the labor burden calculator)
- [ ] Written offer: pay, start date, schedule and the 30-day plan

What to review after each hire

- [ ] Did every candidate get the same questions, test and scorecard?
- [ ] Where the new hire struggles at 30 days, did the interview show it, and was it ignored?
- [ ] Which source produced the hire, and how long each step took

LESSON 3 · CONSTRUCTION EMPLOYEE ONBOARDING CHECKLIST: A NEW HIRE'S FIRST 30 DAYS

New Hire Onboarding Checklist

Lesson 3 of the course. Fill in one copy per new hire, the week before they start. Every row of the plan gets a named trainer, and the day-14 and day-30 conversations go in the calendar before day one.

NEW HIRE

ROLE

START DATE AND TIME

REPORTS TO

BUDDY (FIELD HIRES)

DAY-14 CHECK-IN DATE

DAY-30 REVIEW DATE

WHO RUNS THE TWO CONVERSATIONS

1. Before day one

- [ ] Written offer accepted; start date and time confirmed; where to park and who to ask for
- [ ] Paperwork done or scheduled for the first hour: eligibility and tax forms, state new-hire reporting, anything your insurer or license requires. The list depends on your state; your accountant has it
- [ ] Logins created: scheduling and job software, email if they get one, the group chat if you use one
- [ ] Gear ready: PPE, uniform, tools or tool policy, vehicle or vehicle policy, keys and codes they're allowed
- [ ] The 30-day plan filled in, with every trainer told their dates
- [ ] A buddy named for field hires: a patient, reliable crew member, not necessarily the most skilled one
- [ ] Their first week's schedule set, so the trainer and the new hire are on the same jobs
- [ ] The standards the plan's rows depend on are written down: what's missing is listed below

STANDARDS THE PLAN NEEDS THAT AREN'T ON PAPER YET

2. The 30-day plan: one row per thing to learn or get

- [ ] Every row has a named person in the trainer column. Not "the team"
- [ ] Shadow, then do with review, then do alone. Nobody owns a task on day one

- [ ] The **unresolved gap** column is filled in at each checkpoint: what's still not there, and what you'll do about it

Learning objective	Access or training needed	Responsible trainer	Practice and checkpoint	Unresolved gap
Example Works safely by our rules: PPE, ladders, tools, site housekeeping	Safety walkthrough on day one; your trade's required training where applicable	Crew lead	Day 1 walkthrough; crew lead checks daily in week one	
Example Knows how a job runs here: start time, morning briefing, photos, clean-up, end-of-day report	Reads the job checklist; shadows the crew lead for a full job	Crew lead	Day 5: explains the checklist back without notes	
Example Clocks in and out, reads the day's instructions and uploads photos in the app	20-minute walkthrough; buddy helps for the first week	Office coordinator (app), buddy	Day 3: did it alone three days running	
Example Does our standard finish work: trim, doors, cabinet installs	Watches, then does with the crew lead checking, then alone	Crew lead	Week 2: one task alone, inspected. Week 4: a full day's tasks, inspected	Cabinet installs: level and plumb fine, scribing slow. Pair with Luis on the kitchen next week.
Example Talks to customers the way we do: greeting, what to say about changes ("I'll have the office call you")	Crew lead explains the rule; practices on site	Crew lead	Day 14 check-in	
Example Knows who to call for what	One-page contact list	Office coordinator	Day 1	

Example rows: a carpenter joining a remodeling crew, in a made-up 16-person company.

For an office hire: moving a responsibility over in four weeks

Write the responsibilities the new hire takes over in the column heads. Each week moves one step: shadow, do with review, do with the trainer on call, own it.

Week	Scheduling (or yours)	Customer updates (or yours)	Invoicing (or yours)	Trainer	Checkpoint
Example 1	Shadows the owner building the schedule; reads the scheduling rules; learns the software	Listens in on calls; reads the update points	Watches two invoices go out	Owner (scheduling, updates), bookkeeper (invoicing)	Friday: can explain the rules back; knows where every job lives in the software
Example 2	Builds Thursday's draft schedule; owner reviews and explains every change	Makes the routine update calls from a script; owner listens to the first five	Sends invoices for completed jobs; bookkeeper checks each before it goes	Owner, bookkeeper	Day 14 check-in. Draft schedule needed fewer than five changes?
Example 3	Builds and sends the schedule; owner reviews after it goes out	Owns routine updates; escalates complaints and scope questions	Sends invoices alone; bookkeeper spot-checks weekly	Owner on call	Friday: zero schedule conflicts the crews had to fix themselves?
Example 4	Owns scheduling. Owner sees changes in the weekly meeting	Owns updates	Owns invoicing. Payment reminders added	Weekly check-in only	Day 30 review

Example: a new office coordinator taking scheduling, customer updates and invoicing from the owner. The plan also has rows for the lead script (trainer: owner, checkpoint: ten calls scored), materials ordering (trainer: operations lead) and the weekly team meeting (attends from week one). The conflict in week two is expected: review it, write the rule that was missing, and continue the handover.

3. Day-14 check-in: 20 minutes, sitting down

Question	Their answer
1. Is the work what you expected? What's different?	

Question	Their answer
2. What's been unclear, or something you had to work out on your own?	
3. What's been the hardest part so far?	
4. Is there anything you need that you don't have: tools, access, information, time with someone?	
5. What's one thing we should do differently?	

ONE THING THEY RAISED THAT WE FIXED BEFORE THE NEXT WEEK

TOLD THEM WE FIXED IT ON

4. Day-30 review: row by row

Learning objective	Alone, with help, or not yet	Specific feedback, good and bad	Unresolved gap and what we'll do

For each gap: more practice, a different trainer, a written standard that didn't exist, or a conversation about fit. "Doing great" isn't feedback; "the schedule's gone out on time three weeks running" is.

THE NEXT 60 DAYS: ROWS THAT MOVE TO "ALONE," AND ANYTHING NEW

- [ ] Gaps at day 30 mostly the same as at day 14? Check the plan and the trainer's time before you decide anything about the hire

What to review after the day-30 review

- [ ] Planned onboarding steps completed on time, and which trainers ran out of time

- [ ] Unresolved gaps at day 30, and whether they repeat from hire to hire
- [ ] The last three new hires: how many are still with you, and what they said at day 14
- [ ] The plan fixed before the next hire

LESSON 4 · CREW LEADER AND FOREMAN RESPONSIBILITIES: WHAT TO HAND OFF AND HOW TO TRAIN THEM

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

LESSON 5 · SPREADSHEET · WEEKLY-TEAM-MEETING-AGENDA-AND-ACTION-LOG.XLSX

Weekly Team Meeting Agenda and Action Log

Spreadsheet weekly-team-meeting-agenda-and-action-log.xlsx came with this toolkit. Open it in Excel, Numbers or Google Sheets (File > Import). Yellow cells are yours to type; gray cells calculate. This page says what is in it.

The 30-minute agenda

Thirty minutes, same day, same time, every week. Everyone who owns something attends: the owner, the office, the estimator, the operations lead and the crew leads.

- Your meeting
- The agenda
- Rules that keep it to 30 minutes

The action log

Written during the meeting, on a screen everyone sees. Part 1 of next week's meeting reads this list: each item done, or a new date with a reason. Keep one tab per month: at the start of a month, duplicate this tab and carry over the open actions.

- Actions
- Review, at the monthly numbers meeting
- Decisions

What slowed your crew down last week?

Asked of each lead in turn, in part 4, every week. One sentence each. Write every answer down, even the small ones.

- Answers
- Review, each month

One line per meeting

For the monthly review: meeting length, jobs discussed that were on plan, and how many new actions land on the owner.

- Meetings

CONTRACTOR SCALER HUB · TOOLKIT

Back to the course

Every file in this toolkit follows a lesson of **Hire, Onboard and Grow Crew Leaders** on the Contractor Scaler Hub: when a lesson's example changes, its file changes too. Reread the lesson when a file asks for a number you do not have yet.

All six courses: **motionops.com/scaler-hub**

Spreadsheets in this toolkit

- **Weekly Team Meeting Agenda and Action Log**: weekly-team-meeting-agenda-and-action-log.xlsx

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