MotionOps

CONTRACTOR SCALER HUB · BUILD A JOB WORKFLOW FROM REQUEST TO PAYMENT

Office–Field Handoff Checklist

Part 1 is filled in by the office for every job before the crew leaves. Parts 2 to 4 you agree once with the crews and the office, then use on every job for two weeks. Rule one: if it affects the job, it belongs on the job.

1. Before the crew rolls: the handoff checklist

JOB

CREW LEAD

START DATE AND TIME

CHECKED BY, AND DATE

A service call might only need four of these. Cross out what your jobs don't need; **the crew shouldn't discover on site something the office could have told them before the truck left.**

Item	What it means	On the job	Notes
Approved scope, latest version	What's included and what isn't, including every approved change		
Customer and site contacts	Who to call on site, and who decides if something comes up		
Access	Gate codes, keys, parking, pets, hours the crew can work		
Schedule	Start date and time, expected duration, other trades on site		
Materials	What's delivered, what's on the truck, what's being picked up and where		
Customer decisions	Selections, colors, models, locations, written down, not remembered		
Documents and photos	Plans, permits, photos from the site visit		
Update triggers	What the crew must report, and when (part 2)		
Open items	Anything still unresolved, and who's resolving it		

2. Update triggers: when the field updates the office

Routine updates, quick and the same on every job:

- [ ] On the way
- [ ] Work started
- [ ] On site
- [ ] Work finished

Exception updates, only when they happen. This is where the office has to act.

- [ ] The scope changes or the customer asks for something extra
- [ ] The job will run long enough to affect the next appointment
- [ ] Another visit will be needed
- [ ] A safety issue or property damage
- [ ] An unexpected condition the office or the customer needs to know about (with a photo)

OTHER TRIGGERS FOR OUR WORK

Give photos a job too. "Take pictures" isn't a rule: say which photos matter, and keep them on the job, not in someone's camera roll.

> **Examples from the lesson:** a remodeler might want existing conditions before demolition, progress before work gets covered, and the finished work. An HVAC contractor might want the old equipment, model and serial numbers, and the installed system.

THE PHOTOS OUR CREWS TAKE ON EVERY JOB

3. Who acts on each update

Information alone doesn't move a job. Write who acts on each kind of update, so nobody has to ask: "Was I supposed to do something about this?"

Update	Who acts	What they do
Example Unexpected condition, extra work needed	Estimator or manager	Prices the change and decides the scope
Example Job running long	Dispatcher or office coordinator	Protects the next appointment, tells the next customer
Example Change affects time or cost	Office	Tells the customer and gets the approval recorded
Example Field condition	Technician	Documents it accurately, with photos

4. What goes up the chain, decided before it happens

If everything gets escalated, the owner becomes the company's switchboard. The lesson's examples are in the middle column; write your own rule on the right.

Who handles it	Example from the lesson	Our rule
The crew handles it	A small site condition within the approved scope, a short delay that doesn't affect the next appointment	
Goes to the office or dispatch	A delay that threatens the next appointment, a missing part, a customer question about timing	
Goes up immediately	Work outside the approved scope, a safety issue, significant property damage, a customer dispute, anything likely to add substantial cost	

5. The last five minutes on site: the end-of-visit note

Before closing the job, leave a note someone who wasn't there could understand. Not an essay. If follow-up is needed, say so and say who's doing it.

> EXAMPLE FROM THE LESSON
>
> Arrived for intermittent no-cool. Found failed capacitor. Replaced and tested the system; temperature split normal after repair. Told the customer the condenser fan motor is showing wear. Photos attached. No follow-up needed.

> THE PATTERN TO COPY
>
> Arrived for [the problem]. Found [what you found]. [What you did, and how you checked it]. Told the customer [anything they should know]. Photos attached. Follow-up: [none / what, who, by when].

6. Find where your handoffs leak

Take five recent jobs and trace the information from start to finish. Count the jobs where somebody had to ask each question, and write what was missing. **Fix the ones that show up more than once.**

Question someone had to ask	Jobs (of 5)	What was missing: checklist item, update trigger or owner
"What's the gate code?"		
"Did we order that part?"		
"Who's going back tomorrow?"		
"Did the customer approve this?"		
"Why is this crew still there?"		
"Do we have a photo of what it looked like before?"		

What to review: two weeks before, two weeks after

Per job	2 weeks before	2 weeks after
Clarification calls		
"The crew didn't have it" moments		