

Delivery / Job Management Toolkit — Read Me First

A simple job delivery system to protect quality, timeframes, and profit.

Most profit leaks happen in delivery: unclear scope, weak communication, variations not captured, and no consistent handover. This toolkit gives you a lightweight job ‘operating system’ that any team can run.

Outcome (what you’ll have completed)

- A standard job pack (scope, contacts, schedule, site rules).
- A pre-start checklist to prevent nasty surprises.
- A variation / change order system so extras get charged.
- A daily/weekly job diary to record progress and risks.
- Quality control + handover checklists (reduce rework and callbacks).
- A simple capacity + scheduling board (Excel).
- A job profitability tracker (Excel) to spot margin leaks early.

The order to use these tools

Step	Tool	Why it matters	Time
1	Job Pack (Template)	Clarity: everyone knows scope, responsibilities, and rules.	10–20 min/job
2	Pre-Start Checklist	Find risks early; lock down materials and access.	10–15 min/job
3	Scheduling & Capacity Planner (Excel)	Prevents overbooking and bottlenecks.	15 min/week
4	Site Diary / Progress Log	Creates visibility, accountability, and evidence.	2–5 min/day
5	Variation / Change Order Form	Protects profit; reduces disputes.	2–10 min/variation
6	Quality Control	Stops rework;	10 min/job

	Checklist	improves customer experience.	
7	Handover & Completion Checklist	Ensures clean finish + handover pack.	10 min/job
8	Job Profitability Tracker (Excel)	Measure estimated vs actual to improve margins.	10 min/week
9	Job Debrief (Lessons Learned)	Continuous improvement (systems get stronger).	10 min/job

Two rules that protect profit

- No variation, no work: if scope changes, capture it before proceeding.
- Record it while it's fresh: short daily notes beat long explanations later.