



BEST PRACTICES: PROJECT MANAGEMENT

an AVIXA Systems Integrators
Council Reference Document

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Introduction

The purpose of this Project Management Best Practices guide is to support Audio Visual Project Managers (AV-PM) by providing a practical resource to understand what it takes to be not just a good project manager, but an exceptional one. While our industry and the broader project management field offer numerous resources, ranging from documentation and training programs to certifications from the Project Management Institute (PMI), including the Project Management Professional (PMP), this document aims to complement those by offering targeted guidance for our field of specific projects.

Our goal is to share best practices and useful templates that can help you become a more effective and efficient project manager in the Audio Visual space. Managing AV projects requires proficiency in initiating, planning, engineering, ordering, deploying, communicating, monitoring, and closing projects. Many organizations excel in some of these areas, but few master them all. This guide is designed to bridge those gaps by introducing tools and techniques that enable you to execute projects successfully and with greater efficiency, benefiting both your company and the industry's reputation with end users.

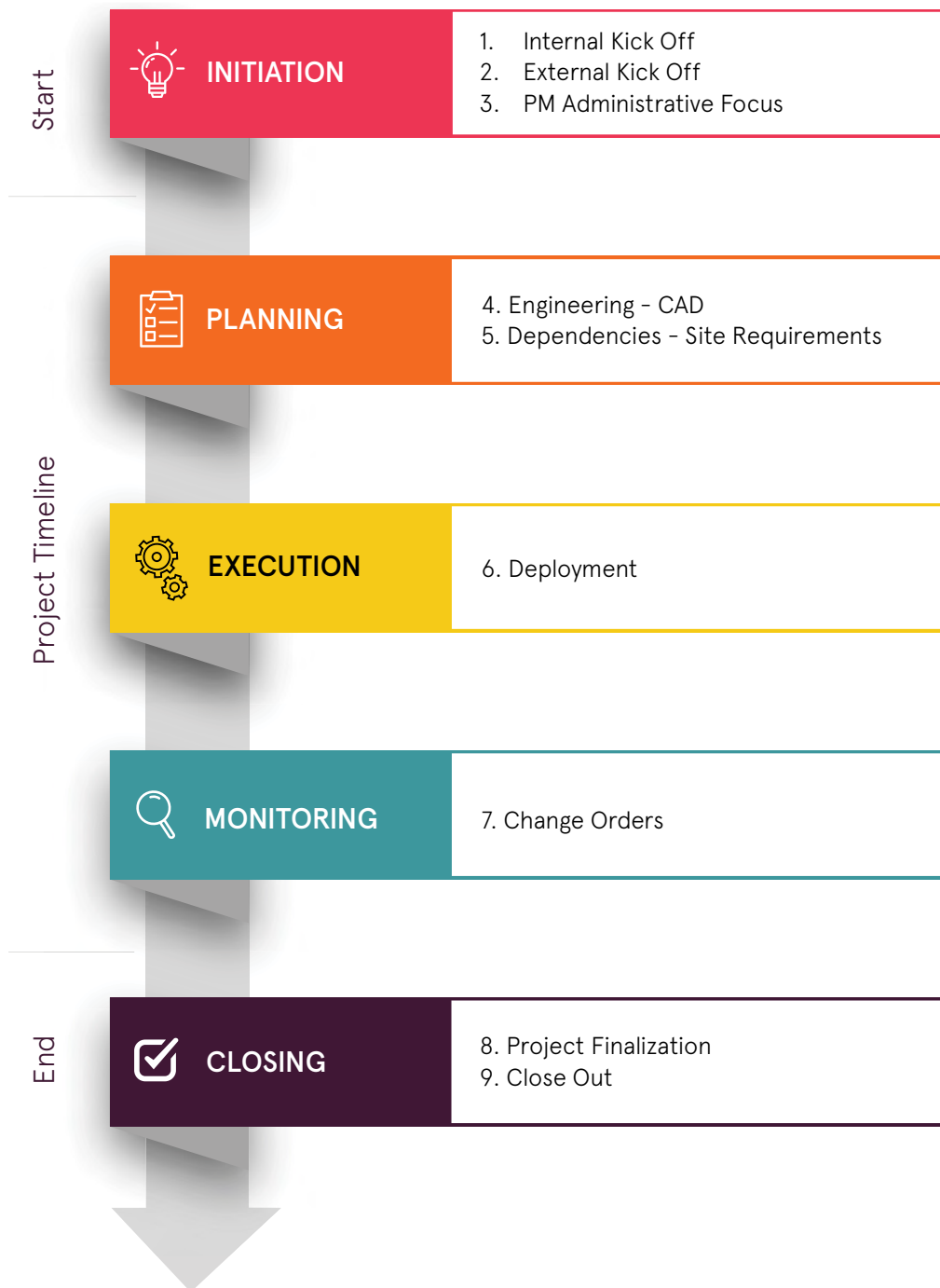
This document outlines a recommended approach to project management that AV-PM can adapt to fit their company's structure. It may inspire process improvements, reinforce existing practices, or serve as a foundation for rebuilding workflows to elevate overall performance. Regardless of your experience level or your organization's current methodologies, this guide offers an additional resource to refine your project management skills.

Included are:

- A high-level overview of project phases and a deliverables table.
- A detailed breakdown of these phases into actionable steps and associated deliverables.

Use this guide as a tool to evaluate your current processes and identify opportunities for improvement.

Project Phase Timeline



Project Phase Deliverable Table

PHASE	TRIGGER	STEP	TASKS	DELIVERABLES
 INITIATION	Client Purchase Order	Internal Kick Off	- Understand Project Scope - Understand Contract - Identify Internal Stakeholder - Internal Team Involvement	- Clarify Scope (RFI) - Stakeholder Register - Management Plan - Team Requirements
Initiation				
 INITIATION	Internal Kick Off Complete	External Kick Off	- Introductions - Establish Approval Process - Understanding Deliverables - Identify External Stakeholders	- Bill of Materials - Scope - Provide Lead Times on Phases - Tasks
Initiation				
 INITIATION	Client Purchase Order	PM Administrative Focused	- Understand Contract - Scope Deliverables - Legal Terms and Conditions (T/C)	- Certificate of Insurance (COI) - Schedule of Values (SOV-AIA) - Safety Documentation
Planning				
 PLANNING	Internal Kick Off Meeting External Kick Off	Engineering - CAD	- Shop Drawings - Submittals - Updating BOM - Ordering of Material	- Updated BOM - Drawing Package - Submittal Package - Provide Equipment Lead Times
Planning				
 PLANNING	External Kick Off	Dependencies Site Requirements	- Site Visits - Meetings - Coordination with Trades - Responsibility Matrix - Scheduling of On Site Resources	- Update Scheduling - Responsibility Matrix
Execution				
 EXECUTION	Engineering - CAD	Deployment	- Requirements for Mock Up and/or Staging of Equipment - Rough-In - Device Install - Programming - Testing	Installed System
Monitoring				
 MONITORING	External Kick Off Deployment	Change Orders	- Review Scope, Contract, New Requests - Proper Sign Off to Additional Work	- Provide Timely Pricing for Requested Changes - Timely Invoicing to Change Orders
Closing				
 CLOSING	Deployment	Project Finalization	- Testing - Commissioning - Customer Training - Customer Acceptance	- Provide Testing Documentation - As-Built - Engineering - User Guides - Operations Manuals
Closing				
 CLOSING	Deployment	Close Out	- Final Billing - Internal Lessons Learned Meeting	- Customer Satisfaction Survey - Sign Off - Service Support Hand Off - Other Required Final Documents



Project Initiation

Internal Kick Off

Stakeholders:

- Project Manager (PM)
- Engineering Team
- Installation Team
- Sales Team
- Internal Stakeholders

Objective: The Project Initiation phase marks the transition from the Sales Team to the Project Manager. This stage focuses on:

- Reviewing all project documentation
- Identifying key participants
- Assessing internal resource requirements

As you review the information, questions will naturally arise. Document these questions and share them with your project team.

STEP 1 | Understand Project Scope

When the project is handed over, the first priority is to gather and review all relevant documentation. The Project Manager must quickly gain a clear understanding of the system vision sold to the client.

Actions

- Collect all documentation:
 - Building plans
 - Sales orders
 - Scope of work
 - Client communications
 - Contracts
 - Tender documents
- Review:
 - Sales order details
 - Scope of work from Sales
 - Building drawings
 - Manufacturer-supplied documentation

Deliverable

- A list of clarifying questions for the project team

STEP 2 | Understand the Contract

Contracts may vary in form—formal agreements, tender documents, or purchase orders for smaller integrators.

Actions

- Review the contract thoroughly
- Confirm alignment between Sales scope and consultant scope (if applicable)
- Identify and document:
 - Key deliverables
 - Programming requirements
 - Operational requirements
 - Physical requirements
- Define project timeline and milestones
- Review payment structure (time-based, milestone-based, or completion-based)



- Check for:
 - Penalties, incentives, and fines
 - Compliance and regulatory requirements
 - Permits
 - Acceptance criteria
 - Dispute resolution and change order processes

Deliverable

- A list of clarifying questions for the project team

STEP 3 | Identify Key Stakeholders

Begin identifying stakeholders and planning their management. This framework will evolve during the External Kickoff phase. Collaborate with the Sales Team to gather relevant contacts.

Actions

- Review Internal Contacts
- Review Client Contacts
- Review general contractor and third-party contractor contacts

Deliverables

- **Stakeholder Register** including:
 - Name, company, title, phone, email
 - Project role
 - Communication preferences
 - Influence level
 - Scope of involvement (entire project or segments)
 - Interdependencies
 - Interest level and expectations
- **Stakeholder Management Plan**

STEP 4 | Team Involvement

Internal teams often start work immediately after the sales order is issued to ensure timely delivery. Prepare answers for the External Kickoff meeting and define internal requirements.

Actions

- Drafting: Estimate documentation delivery timelines
- Engineering Team: Identify required services (e.g., permitting, stamping)
- Programming Team: Gather programming requirements
- Purchasing: Confirm procurement needs
- Installation Team: Define installation requirements

Deliverables

- Estimated equipment arrival dates
- Internal timeline and coordination within the installation schedule



Project Initiation

External Kick Off

An External Kickoff meeting in the AV industry is essential for aligning all stakeholders—customers, decision-makers, internal teams, IT departments, facility managers, architects, and end-users. This meeting ensures everyone is informed, aligned, and prepared to contribute to the project's success.

Key Steps

1. Define Audience
2. Establish a Communication Plan
3. Define Roles and Responsibilities
4. Share the Project Plan
5. Align Objectives
6. Identify Dependencies and Constraints
7. Confirm Site Logistics and Access Requirements
8. Outline Action Items and Next Steps
9. Document Meeting Summary and Minutes
10. Secure Stakeholder Buy-In

STEP 1 | Define Audience

Identify the right attendees for the kickoff session. While it may not be practical to include everyone for smaller or repetitive projects, aim for a diverse group representing all critical disciplines.

Actions

- Prepare and share the meeting agenda and objectives in advance
- Include major stakeholders:
 - Client decision-makers, end-users, IT department
 - General contractor or key trades
 - Other critical contributors
- Create a welcoming environment:
 - Introduce attendees by role and responsibility
 - Encourage open participation

Deliverable

- Meeting invitation with date, time, and agenda

STEP 2 | Establish a Communication Plan

Set clear expectations for communication channels, frequency, and escalation paths. Tailor the plan to the project and customer needs.

Actions

- Define communication paths:
 - Key contacts (primary and secondary)
 - Preferred methods and frequency
- Establish escalation procedures
- Specify response time expectations
- Determine how documents and updates will be shared and stored
- Present schedule and major milestones

Deliverable

- Written communication plan approved by all stakeholders

STEP 3 | Define Roles and Responsibilities

Clarify roles to ensure accountability and streamline collaboration.

**Actions**

- Document:
 - Role title and description
 - Key responsibilities and deliverables
 - Accountabilities and deadlines
 - Interdependencies between roles
- Consider using a RACI Matrix:
 - R = Responsible
 - A = Accountable
 - C = Consulted
 - I = Informed

Deliverable

- Stakeholder list with roles and responsibilities

STEP 4 | Share the Project Plan

Provide a clear overview of the project, including scope, timelines, and risks.

Actions

- Present:
 - Project objectives and scope
 - Deliverables (what's included/excluded)
 - Timeline and milestones
 - Current progress
 - Resources allocated
- Discuss risks and mitigation strategies
- Outline escalation process
- Highlight action items and next steps

Deliverables

- Clarifying questions for the stakeholders
- Documented action items with deadlines

STEP 5 | Align Objectives

Ensure all parties share a common understanding of project goals.

Actions

- Confirm alignment with customer objectives
- Address needs of different user groups

Deliverable

- Documented clarifications and agreements

STEP 6 | Identify Dependencies and Constraints

Facilitate collaboration and address potential challenges early.

Actions

- Discuss inter-team dependencies
- Identify constraints and mitigation strategies

Deliverables

- List of dependencies and management plans
- List of challenges and mitigation strategies



STEP 7 | Site Logistics and Access Requirements

Ensure smooth operations during installation and testing.

Actions

- Confirm site access details, working hours, and security protocols
- Note special conditions (e.g., noise restrictions, electrical needs)

STEP 8 | Action Items and Next Steps

Maintain momentum post-meeting.

Actions

- Assign tasks with deadlines
- Share responsibilities clearly

Deliverable

- Action item list distributed to all stakeholders

STEP 9 | Meeting Summary and Minutes

Document decisions and provide a reference point.

Actions

- Summarize discussions, decisions, and unresolved questions
- Share follow-up actions

Deliverable

- Meeting summary sent to all stakeholders

STEP 10 | Stakeholder Buy-In

Secure commitment and foster collaboration.

Actions

- Address concerns early
- Reinforce importance of teamwork and communication
- Create a positive, productive atmosphere



Project Initiation

Administrative

The primary administrative requirements for a project typically include:

- Signed Contract
- Insurance Documentation
- Safety Documentation
- Payroll Documentation
- Monthly Billing

STEP 1 | Review and Execute Contract

Before the project begins, the Project Manager must thoroughly review the client contract. The Sales Team should also confirm agreement with all terms and scope. Pay close attention to bonding, taxes, wage determinations, insurance requirements, exclusions, and the project schedule. Ensure both parties exchange fully executed contracts signed by authorized representatives.

Actions

- Review contract details:
 - Confirm scope based on drawings, specifications, or proposal
 - Verify exclusions (items outside your scope or provided by others)
 - Review project schedule and key milestones

Deliverable

- Fully executed signed contract

STEP 2 | Obtain Required Insurance

Provide a Certificate of Insurance (COI) covering Commercial General Liability, Automobile Liability, Umbrella Liability, and Workers' Compensation/Employer's Liability for both onsite and offsite work. Requirements are typically outlined in the contract and may include sample COIs. Share these requirements with your insurance broker to generate the COI and supporting documents.

Some projects may require enrollment in special programs such as Contractor Controlled Insurance Program (CCIP) or Owner Controlled Insurance Program (OCIP). These programs involve additional documentation and monthly reporting of man-hours and payroll.

Actions

- Request COI from insurance broker based on contract requirements
 - Enroll in CCIP/OCIP if required:
 - Complete enrollment forms
 - Submit COI and supporting documents

Deliverables

- COI and supporting insurance documents
- Monthly man-hour and payroll reports for CCIP/OCIP

STEP 3 | Employee and Project Safety

Safety is critical for successful project execution. If contracted directly with the Owner, confirm their safety requirements. If contracted through a General Contractor, follow their safety program and provide a site-specific safety plan for your team. Conduct a Job Hazard Analysis (JHA) for each task and communicate safety protocols to all personnel.

Regular safety meetings are essential—daily huddles plus weekly or bi-weekly dedicated sessions. Ensure all AV personnel have OSHA training:

- OSHA 10 for technicians
- OSHA 30 for supervisors



Additionally, provide First Aid and CPR training.

Actions

- Develop a site-specific safety manual
- Communicate safety plan and JHA to the team

Deliverable

- Site specific safety manual
- Job Hazard Analysis (JHA)

STEP 4 | Payroll Compliance

Government-funded projects often require adherence to prevailing wage rates (wage determination) and certified payroll reporting. Confirm payroll requirements and provide details to Human Resources for compliance.

Actions

- Notify HR if wage determination applies
- Share wage determination details (Decision number and date)

Deliverable

- Weekly certified payroll reports

STEP 5 | Create Schedule of Values (SOV)

A Schedule of Values (SOV) is a detailed breakdown of the project scope into logical segments (e.g., by levels, sections, or phases), assigning a dollar value to each portion of work. This document is submitted to the client for approval and becomes the foundation for tracking progress and submitting monthly billings as outlined in the contract.

Actions

- Prepare the SOV based on the approved scope of work

Deliverable

- SOV submitted for client approval

STEP 6 | Billing

Billing is typically done monthly through progress billing, based on work completed or projected to be completed by the end of the billing period. The deadline and billing schedule should be confirmed with the client.

While some clients accept invoices via QuickBooks, the construction industry standard is AIA Billing, which uses two forms:

- G702 – Application and Certificate for Payment
- G703 – Continuation Sheet

These forms can be generated using Excel templates with macros or specialized billing software.

Actions

- Confirm monthly billing deadline and schedule
- Review approved SOV and assess completed/progress work
- Prepare billing documentation (AIA forms or client-approved format)

Deliverable

- Monthly progress billing package



STEP 7 | Compliance and Other Reporting

Certain projects require compliance reporting for certification programs supporting small or underrepresented businesses, such as:

- Minority Business Enterprise (MBE)
- Women Business Enterprise (WBE)
- Disadvantaged Business Enterprise (DBE)
- Veteran-Owned Small Business (VOSB)

These programs often mandate quarterly reporting to a compliance administrator.

Actions

- Confirm reporting requirements and obtain necessary forms for applicable certification programs

Deliverable

- Completed compliance reports as required

Planning - Engineering

CAD - Submittals

Stakeholders: Engineering Team/CAD, Project Manager, Internal Teams

This phase focuses on creating all necessary engineering documents—drawings, line diagrams, riser details, mounting details, and submittals—to meet or exceed the requirements outlined in the project contract. Updating the **Bill of Materials (BOM)** is a critical milestone. Every component required for installation must be verified and documented. Once the engineered drawing set is complete and signed off, the next step is ordering equipment.

STEP 1 | Internal Engagement

Collaborate with the Engineering and CAD teams to establish schedules, deliverables, and expectations based on the project scope and contract requirements.

Actions

- Engage with internal teams
- Define deliverables and timelines
- Review contract scope and project documents

Deliverables

- Clear communication and documented milestones
- Regular updates to stakeholders

STEP 2 | Shop Drawings (If Required)

Prepare detailed drawings to guide the installation team and ensure alignment with project intent.

Actions

- Review all contract drawings (Architectural, Structural, Electrical, Data Cabling) for conflicts
- Validate critical factors:
 - Power loads, heat dissipation, acoustics, finishes
 - Elevation consistency across disciplines
 - Rough-in and power requirements
- Create drawings, which may include:
 - Device and cable layouts
 - Line diagrams
 - Rack risers
 - Cable pull schedules
 - Mounting details
 - Termination details
 - Custom plates and engraving

Deliverables

- Complete set of engineered drawings per client and company standards
- Immediate escalation of any conflicts to stakeholders

STEP 3 | Update Bill of Materials (BOM)

Ensure the BOM reflects all equipment and accessories required for installation.

Actions

- Verify models, accessories, and hardware
- Update BOM with data sheets for each item

Deliverable

- Accurate BOM aligned with drawings and scope

STEP 4 | Data Sheet Submittals (If Required)

Prepare submittals detailing every piece of equipment for client review and approval.

Actions

- Create data sheet submittals based on updated BOM
- Highlight exact model numbers to avoid confusion

Deliverable

- Complete set of submittals for client and stakeholders

STEP 5 | Contract Review

Confirm that engineering deliverables meet contractual requirements.

Actions

- Validate BOM and drawings against contract scope

Deliverable

- Updated BOM and drawings ready for sign-off

STEP 6 | Internal Sign-Off

Finalize all internal documents before client submission and equipment ordering.

Action

- Review all documents with relevant team members

Deliverable

- Complete, approved engineering package

STEP 7 | Submit Documentation to Client

Provide the full package for client review and approval.

Action

- Compile and submit all drawings, BOM, and submittals

Deliverable

- Complete documentation package submitted to client

STEP 8 | Engineered/CAD As-Builts

Create final documentation for long-term support and maintenance.

Actions

- Update drawings as the project progresses
- Include:
 - Commissioning forms
 - Programming documents
 - Equipment lists with serial numbers, MAC addresses, and other identifiers

Deliverable

- Complete set of As-Built documentation

Key Note:

Timely completion of engineering deliverables is critical. Delays can impact equipment ordering and installation schedules, potentially causing cost overruns. A thorough review of engineering scope and BOM improves accuracy and profitability.

Dependencies – Site Requirements

Stakeholders: Project Manager, Engineering Team, Installation Team, External Client, External Project Team

Goal: As soon as the contract is awarded, the AV Project Manager should begin collaborating with all relevant stakeholders. Each project varies in scope, so identifying key stakeholders early is critical for proper communication and documentation flow. Typical stakeholders include the General Contractor, client representatives, and any client departments essential to project success. Open, structured communication minimizes mistakes, rework, and costly change orders.

STEP 1 | Coordination

Engage external stakeholders and establish clear expectations for milestones, deliverables, and responsibilities. Confirm communication protocols with the client.

Actions

- Stakeholder engagement
- Define milestones and deliverables with client and project team
- Review integration requirements with external contractors (GC, electrical, structural, cabling, carpentry)

Deliverable

- Responsibility matrix

STEP 2 | Site Drawing Review

Ensure alignment between engineered drawings and onsite conditions.

Actions

- Compare AV drawings to site conditions
- Verify consistency across other contractors' drawings (power, rough-ins, wall/floor boxes)
- Check ADA compliance
- Confirm elevations match site reality

Deliverable

- Documented confirmation or escalation of discrepancies

STEP 3 | Review FF&E (Furniture, Fixtures & Equipment)

Validate compatibility between AV systems and FF&E.

Actions

- Cross-check AV drawings with FF&E documentation
- Confirm acoustic treatments and finishes align with AV equipment specifications

Deliverables

- No conflicts between AV systems and FF&E
- Equipment color and finish match design requirements

STEP 4 | Site Requirements & Logistics

Prepare for smooth onsite operations.

Actions

- Confirm paperwork requirements with GC (COI, safety documentation)
- Plan delivery and storage logistics
- Verify site access (hours, elevators, stairways)
- Confirm parking arrangements

Deliverable

- All necessary documentation and approvals for site access



Project Execution

Deployment

Stakeholders: Project Manager, Internal Installation Team, Internal Engineering Team, External Client, External Project Team

After extensive planning, coordination, and documentation, the actual on-site work begins. If previous phases were executed correctly, this stage should proceed smoothly. The installation team should have all necessary resources—engineering drawings, tools, cables, equipment, connectors, and support—to perform efficiently.

STEP 1 | Confirm Readiness

Before deploying teams, verify that all prerequisites are met to avoid costly delays.

Actions

- Communicate with project supervisors and owners:
 - Are milestones being met?
 - Does your schedule align with site conditions?
 - Are potential issues communicated promptly?
 - Is the site prepared for your team?
 - Is a staging area approved?
- Coordinate with programming team if custom programming is involved
- Confirm all accounting and compliance documentation (e.g., COI)
- Prepare testing, commissioning, and completion documentation

Deliverables

- Updated milestone report
- Approved programming layout
- Commissioning and testing forms
- Scheduled deployment plan

STEP 2 | Fabrication

Complete any required fabrication, staging, and pre-testing before installation.

Actions

- Define fabrication requirements and timelines
- Ensure deliverables align with site schedule
- Coordinate with programming, commissioning, and testing teams
- Plan delivery logistics and staging

Deliverable

- Fabricated and tested equipment delivered on schedule

STEP 3 | Site Rough In

Prepare the site for device installation, including early cabling if required.

Actions

- Verify site readiness against engineering drawings
- Coordinate with other trades to meet AV requirements
- Deploy appropriate personnel per schedule
- Ensure necessary hardware and tools are available

Deliverable

- Installed rough-in components (pathways, cable, back boxes)



STEP 4 | Trim

Finalize cabling and prepare for hardware installation.

Actions

- Confirm hardware availability
- Install and test custom plates if required
- Terminate and certify all cables

Deliverable

- Labeled, dressed, and tested cabling ready for equipment installation

STEP 5 | Installation

This is typically the longest phase. Proper planning ensures smooth execution.

Actions

- Set milestone goals for installation team
- Review goals regularly with key team members
- Provide necessary tools, resources, and equipment
- Enforce safety protocols
- Confirm phased delivery of equipment if applicable

Deliverable

- Fully installed system meeting schedule requirements

STEP 6 | Programming

If custom programming is required, manage expectations and timelines carefully.

Actions

- Obtain client approval for GUI and programming scope
- Ensure programmer understands deliverables
- Conduct regular check-ins to monitor progress

Deliverable

- Fully operational system with approved custom programming, tested and signed off

Key Insight:

A smooth deployment reflects effective project management. Frequent issues, last-minute orders, expedited shipping, or extended work hours indicate gaps in planning and require lessons learned for future projects.

Monitoring

Change Order

Stakeholders: Project Manager, Engineering Team, Installation Team, External Client, External Project Team

Goal: Change requests are common in most projects. Clients often request modifications beyond the original scope. A clear understanding of the initial scope and effective communication of changes is critical for project success. Timely follow-up with detailed pricing and documentation ensures smooth implementation and prevents disputes.

STEP 1 | Continuous Review of Contract, Scope, and Requests

Regularly review the contract and scope to identify deviations and manage new requests effectively.

Actions

- Clarify objectives with stakeholders
- Engage with client and external project team
- Communicate milestones and expectations
- Review deliverables and integration requirements with other trades (GC, electrical, structural, cabling, carpentry)
- Conduct impact analysis for requested changes

Deliverable

- Updated milestone expectations aligned with external team requirements

STEP 2 | Prepare Accurate Cost and Scope for Changes

Ensure all change requests are properly scoped and priced.

Actions

- Develop a detailed change scope of work
- Validate that the scope meets client expectations
- Calculate accurate costs, including labor, materials, and administrative time

Deliverable

- Written scope of work with associated costs submitted for stakeholder approval

STEP 3 | Execute Approved Change Orders

Once approved, coordinate implementation across all teams.

Actions

- Order required equipment and hardware
- Schedule tasks to meet revised milestones
- Communicate updates to installation and engineering teams

Deliverable

- Completed change order with documented sign-off

STEP 4 | Update Project Documentation

Reflect all changes in official project records..

Actions

- Revise engineered drawings before installation
- Update programming to incorporate changes
- Modify commissioning forms and project scope documents
- Distribute updated documentation to all stakeholders

Deliverable

- Comprehensive, updated documentation package

STEP 5 | Billing for Change Orders

Proper invoicing ensures financial accuracy and project profitability.

Actions

- Confirm sign-off for completed change orders
- Submit invoice using AIA forms with SOV or client-approved format

Deliverable

- Approved invoice for change order billing

Resource

Change Order Management – October 2019 by Luke Jordan and George V. Fournier Jr.



Project Finalization

Stakeholders: Project Manager, Engineering Team, Installation Team, External Client, External Project Team

Goal: At this stage, the project is fully installed, programmed, and all change orders have been completed. The focus now is on testing, commissioning, documentation, and ensuring users are properly trained and supported.

STEP 1 | Testing & Commissioning

Ensure the system operates as intended and meets all project requirements.

Actions

- Complete company testing and commissioning forms
- Verify system functionality against project scope
- Document all hardware details (serial numbers, MAC addresses, etc.)

Deliverable

- Fully operational and tested system with verified performance

STEP 2 | As-Built Documentation

Update all engineering drawings to reflect the final installed state.

Actions

- Engineering/CAD team creates updated as-built drawings
- Collect all field documentation from installation and commissioning teams

Deliverable

- Complete set of as-built documents submitted to client and stakeholders

STEP 3 | Operation Manuals & User Guides

Provide clear documentation for system operation and future servicing.

Actions

- Compile updated field documentation
- Create user-friendly operation manuals and guides for client reference

Deliverable

- Complete set of user documents for client use and future maintenance

STEP 4 | Customer Training

Ensure end-users are confident in operating the system.

Actions

- Schedule and conduct training sessions for end-users
- Provide supporting documentation during training

Deliverables

- Trained users
- Signed training attendance records



Close Out

Stakeholders: Engineering Team/CAD, Project Manager, Internal Teams, External Client

Goal: This phase ensures all documentation is finalized, the client is satisfied and actively using the system, and all financial obligations are completed. Obtain full customer acceptance, deliver all required documentation, and finalize billing. Proper documentation and sign-off are critical for long-term support by the service department.

STEP 1 | Customer Acceptance

Confirm the project meets the agreed scope and the client is fully operational with no issues.

Actions

- Follow up with the client to confirm satisfaction
- Provide acceptance paperwork and documentation for sign-off

Deliverable

- Signed Customer Acceptance Form

STEP 2 | Lessons Learned

Conduct a review to identify successes and areas for improvement.

Actions

- Set up a meeting with the appropriate parties to have a lessons learned. Review what was done right and wrong.
- Figure out areas and discuss how to improve.
- If the project did not go so well a lesson learned with the client may be necessary.

Deliverables

- Full lessons learned document for direct supervisors or others to review to improve future projects and the companies processes

STEP 3 | Final Close Out

Complete all administrative and financial tasks to officially close the project.

Actions

- Ensure all documents, forms, and programs are properly archived
- Submit final invoices
- Verify all accounting entries (orders, labor, miscellaneous costs)
- Notify post-installation/service team for ongoing support readiness

Deliverable

- Final invoicing submitted
- Project fully closed in all systems

Administrative Safety

The Occupational Safety and Health Administration (OSHA), part of the U.S. Department of Labor, establishes and enforces standards to ensure safe and healthy working conditions. OSHA also provides training, outreach, education, and assistance to help employers protect workers from injuries and illnesses.

OSHA Standards

- General Industry Standards: Title 29 CFR 1910 – applicable to most workplace environments
- Construction Standards: Title 29 CFR 1926 – specific to construction sites

Training Requirements

OSHA mandates that employers provide training on workplace hazards. Resources include free publications, videos, and guidelines. A comprehensive list of standards requiring training is available in OSHA Publication 2254.

OSHA Outreach Training Program

This program offers basic and advanced safety training focused on hazard identification, avoidance, control, and prevention—not on OSHA regulations themselves.

- OSHA 10-Hour Training:
 - Intended for entry-level workers
 - Covers common job site hazards
- OSHA 30-Hour Training:
 - Designed for workers with safety responsibilities
 - Provides greater depth and variety of training

Upon completion, participants receive an official OSHA course completion card.

Employer Responsibilities

Employers must provide additional training specific to job hazards beyond the general OSHA outreach programs. This ensures compliance with OSHA standards and promotes a safe work environment.

Administrative Payroll

“Under the Davis-Bacon and Related Acts and Reorganization Plan No. 14 of 1950, the U.S. Department of Labor is responsible for determining prevailing wages, issuing regulations and standards to be observed by federal agencies that award or fund projects subject to Davis-Bacon labor standards, and overseeing consistent enforcement of the Davis-Bacon labor standards.

The Davis-Bacon and Related Acts apply to contractors and subcontractors performing on federally funded or assisted contracts in excess of \$2,000 for the construction, alteration, or repair (including painting and decorating) of public buildings or public works. Davis-Bacon Act and Related Act contractors and subcontractors must pay their laborers and mechanics employed under the contract no less than the locally prevailing wages and fringe benefits for corresponding work on similar projects in the area.

The Davis-Bacon Act directs the Department of Labor to determine such locally prevailing wage rates. The Davis-Bacon Act applies to contractors and subcontractors performing work on federal or District of Columbia contracts. The Davis-Bacon Act prevailing wage provisions apply to the “Related Acts,” under which federal agencies assist construction projects through grants, loans, loan guarantees, and insurance.

For prime contracts in excess of \$100,000, contractors and subcontractors must also, under the provisions of the Contract Work Hours and Safety Standards Act, as amended, pay laborers and mechanics, including guards and watchmen, at least one and one-half times their regular rate of pay for all hours worked over 40 in a workweek. The overtime provisions of the Fair Labor Standards Act may also apply to DBA-covered contracts.” [Davis-Bacon and Related Acts | U.S. Department of Labor]



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER	CONTACT NAME:	
	PHONE (A/C, No, Ext):	FAX (A/C, No):
	E-MAIL ADDRESS:	
	INSURER(S) AFFORDING COVERAGE	
	NAIC #	
INSURED	INSURER A :	
	INSURER B :	
	INSURER C :	
	INSURER D :	
	INSURER E :	
		INSURER F :

COVERAGES

CERTIFICATE NUMBER:

REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	COMMERCIAL GENERAL LIABILITY						EACH OCCURRENCE \$
	☐ CLAIMS-MADE ☐ OCCUR						DAMAGE TO RENTED PREMISES (Ea occurrence) \$
							MED EXP (Any one person) \$
							PERSONAL & ADV INJURY \$
	GEN'L AGGREGATE LIMIT APPLIES PER: ☐ POLICY ☐ PRO-JECT ☐ LOC OTHER:						GENERAL AGGREGATE \$
B	AUTOMOBILE LIABILITY						COMBINED SINGLE LIMIT (Ea accident) \$
	☐ ANY AUTO OWNED AUTOS ONLY ☐ SCHEDULED AUTOS						BODILY INJURY (Per person) \$
	☐ HIRED AUTOS ONLY ☐ NON-OWNED AUTOS ONLY						BODILY INJURY (Per accident) \$
							PROPERTY DAMAGE (Per accident) \$
							\$
A	UMBRELLA LIAB ☐ OCCUR						EACH OCCURRENCE \$
	EXCESS LIAB ☐ CLAIMS-MADE						AGGREGATE \$
	DED ☐ RETENTION \$						\$
C	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY						PER STATUTE ☐ OTH-ER ☐
	ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) ☐ Y / ☐ N						E.L. EACH ACCIDENT \$
	If yes, describe under DESCRIPTION OF OPERATIONS below						E.L. DISEASE - EA EMPLOYEE \$
							E.L. DISEASE - POLICY LIMIT \$
A	Business Property						Contents

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

CERTIFICATE HOLDER

CANCELLATION

	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.
	AUTHORIZED REPRESENTATIVE

IDENTIFYING HAZARD CONTROL OPTIONS: Job Hazard Analysis

Job Hazard Analysis Form

Location: _____ Department: _____ Job: _____

Shift: _____ Date: _____ Job Classification: _____

Operation/Job Process: _____

Assessment Members: _____

#	Steps	Hazards	Examples of Controls

Job Hazard Analysis Form

Location: Grocery Store **Department:** Bakery **Job:** Baker

Shift: Morning **Date:** _____ **Job Classification:** Associate Staff

Operation/Job Process: Dough Making

Assessment Members: Safety Team, Bakery Manager, Union Representative

#	Steps	Hazards	Examples of Controls
1	Employee #2 manually lifts 40-lb flour bags, one at a time, from pallet unassisted	• Repetitive motion and stress on lower back (ergonomic)	• Adjustable lift table • Two-person lifts • Frequent breaks
2	Employee #2 pours the flour bags into mixing machines	• Process generates dust around mixer opening and Employee #2's breathing zone (inhalation) • Dust cakes on exposed skin (contact) • Pinch points for loose hair and clothing	• Lid for mixer • Local exhaust ventilation system • Appropriate respirator protection • Long sleeve clothing (tight fitting) • Gloves • Remove any accumulations of dust
3	Employee #2 drops empty bag on the floor for removal later	• Tripping hazard • Additional dust exposure when bags are removed (housekeeping, etc.)	• Waste container near worker • Reposition process so pallet is near mixer and not blocking path to waste receptacle • Routine housekeeping inspection

Sign-Off

Is the above information up to date and accurate?

Worker

☐ Yes ☐ No

Name: _____ Date: _____

Manager

☐ Yes ☐ No

Name: _____ Date: _____

Supervisor

☐ Yes ☐ No

Name: _____ Date: _____

Company Logo

Project Name:			
Project No.		Date of Test/Handover:	
Room No.		Room Type:	

Checklist

Pre-Commissioning Checks	Snags	Test Equipment Required
☐ 1st Fix Complete ☐ 2nd Fix Complete ☐ Labling Complete ☐ Equipment Powered Up ☐ Firmware Updated	☐ ☐ ☐ ☐ ☐	☐ 4K HDMI Source2nd Fix Complete ☐ Network Tester / Wire Map ☐ HDMI Cable Tester (Kramer) ☐ CATx Certifier ☐ Fibre Light Source & Tester

Equipment Performance

Display	Pass	Fail	Follow-Up
Confirm Display is Securely Fixed	☐	☐	☐
All Cables are Correctly Plugged in	☐	☐	☐
All Cables Labled	☐	☐	☐
Date & Time Set	☐	☐	☐
Crestron Connected Enabled	☐	☐	☐
IP address Available	☐	☐	☐
Verify Signal Input	☐	☐	☐

Control Interface	Pass	Fail	Follow-Up
Button Panel Operational	☐	☐	☐
Touch Panel Operational	☐	☐	☐
Wireless Touch Panel Operational	☐	☐	☐
	☐	☐	☐
	☐	☐	☐

Rack	Pass	Fail	Follow-Up
Equipment Properly Mounted	☐	☐	☐
Adequet Ventilation	☐	☐	☐
Forced Air Cooling Required	☐	☐	☐
Cables Dressed	☐	☐	☐
Cables Labled	☐	☐	☐
Soak Test	☐	☐	☐

Notes	Follow-Up
	☐
	☐
	☐
	☐
	☐
	☐

UC Engine/Camera	Pass	Fail	Follow-Up
Device on network	☐	☐	☐
Credentials Applied	☐	☐	☐
Test Call Made	☐	☐	☐
Volume Level In Room	☐	☐	☐
Far End Audio Ok	☐	☐	☐
Share Content Checked	☐	☐	☐
	☐	☐	☐

Audio	Pass	Fail	Follow-Up
	☐	☐	☐
	☐	☐	☐
	☐	☐	☐
	☐	☐	☐
	☐	☐	☐
	☐	☐	☐

General	Pass	Fail	Follow-Up
	☐	☐	☐
	☐	☐	☐
	☐	☐	☐
	☐	☐	☐
	☐	☐	☐

Hereworks Engineer Sign Off

Client Rep/Consultant Sign Off

Field Directed Change Order

Authorization to Proceed

Originator

Customer:			
Project:		Date:	
Contact:		Job:	
Phone:		Project Manager:	

Change Requested by: ☐ Customer ☐ Contractor ☐ Integrator ☐ Other _____

Reason: ☐ Customer Needs ☐ Construction Change ☐ Field Condition Necessitates ☐ Other _____

Drawing Change Necessary: ☐ Yes ☐ No ☐ Submit "As Builts" ☐ Date Required: _____

Description of Change (including reason for):

Equip/ Materials - Additions		Description:
		Description:
		Description:

Equip/ Materials - Deletions		Description:
		Description:
		Description:

The Labor estimates provided in this Field Directed Change Order are within +/- 20% and will be finalized in the Contract Change Order.

Integrator Labor

Est. Engineer Hrs		Estimated Schedule Impact:		Days		Hours	
Est. Technician Hrs		Estimated Date Work to Begin:					
Est. Project Mgr Hrs		Comments:					
Est. Programming Hrs							
Total Hours (Estimated)							

Approval

Customer		Initials		Date	
Contractor (if required)		Initials		Date	
Integrator		Initials		Date	



Thank you to our authors:
Phil Ayache · Rodrigo Baca ·
Jeremy Forward · Maru Gaitan ·
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