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| --- | --- | --- | --- |
| Date: |  | Project: |  |
| Time: |  | Facilitator (PM): |  |
| Location: |  | Attendees: | *include representatives from sales, engineering and procurement* |

1. Overview of the job by the Sales person
2. Completion of a job schedule to set date for:
   1. Final system engineering
   2. Project documentation
   3. Equipment ordering
   4. Rack fabrication
   5. On-site integration
   6. Control systems programming (including panel page approval)
   7. System completion
3. Review of the proposed equipment
   1. Long lead items
   2. Any products unfamiliar to the team
   3. All color selections complete (face plates, wall mounted devices, support hardware, etc.)
4. Detail discussion of the Scope of Work
   1. Material handing requirements / site & building access
   2. Submittal requirements
   3. Required resources
   4. Owner furnished equipment
   5. Other challenges/concerns/risks
5. Identify roles of any subcontractors and/or contractors involved
   1. Labor estimate versus Subcontractor quote (if applicable)
   2. Required paperwork in place (contract, COI, W9)
6. Identify location and time of any customer project meetings
7. Identify any immediate action items
8. Plan and schedule site visit
9. Other

Reference Documents:

Scope of Work

Estimate

Project Contacts

Site Survey

Project Drawings

Project Specifications

Original RFP and Addenda