



# **Project Coordinator Job Manual**

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## Abbreviated PC Responsibilities

**1. Call the customer the day before:**

Let them know the time of arrival, ask them “is there anything you’d like me to know,” and tell them to call if they need anything at all; you’re at their service.

If you can't get them on the phone, leave a message and a text. Let your foreman know if there is anything he should be specifically aware of on the job.

**2. Check the work order/material list either the day before or the morning of the job:**

This allows you to know what you need to have in your truck materials-wise that Ravnec won't deliver and to double check the sales notes on the work order.

**3. Send a work order to the foreman the day before the job:**

Add extra notes via text if necessary so the crew can be more prepared. You can also send all the work orders in order the week before if your foreman would prefer to plan for the coming week ahead of time.

**4. Call the customer the morning of the job:**

Let them know we are on the way. If they don't answer, send a text. Make sure that your crew is ready to go.

**5. Put extra materials (if needed) in the truck and check the materials list:**

See [Project Coordinator Truck Stocking Checklist](#).

**6. Go to the job site and meet with customers:**

Take time to ask them if they have any concerns.

**7. Check materials delivered on site and check the materials list on Job Progress:**

If some are missing, G-chat the branch chat and go get needed materials.

**8. Take pictures of materials, receipts, signs, and the house before, during, and after work:**

Make notes of anything that is pertinent like damages that are already present before work begins.

**9. Upload pictures taken to Job Progress.**

**10. Put plywood over AC units to keep debris off. Make sure the AC unit can still function. Also put OSB over windows, glass doors, newly painted deck, etc as needed.**

- 11. Put the Cenvar sign out in front of the house. Move the bucket from scheduled to work in progress via Job Progress.**
- 12. Fill out the PC checklist as you go while on site.**

The Project Coordinator Job Site Checklist is a form in Job Progress located in Forms and Proposals.
- 13. Update branch G-chat at 3pm about jobs that day. Roof status, etc.**
- 14. If finishing other jobs quickly, call customers later in the week to see if they are good with you starting early, then tell the branch office manager:**

Make sure materials are delivered by keeping Ravnec updated 3 days in advance.  
Check travel time and inform the crew.
- 15. Complete scheduled final walk-throughs for the day. You can do this via phone call if the customer is not at home.**
- 16. After the final walk-through:**
  - Ask them about payment options. They can give you a check, mail it, deliver it in person to the office, or pay online.
  - Pick up materials (sometimes get crew to do this) at the job site.
  - Send Google reviews to customers via Chekkit. The following day, text the customer and ask them if they were able to see the Google review link.
- 17. If a customer does not want a final walk-through, pick up, or get crew to pick up, leftover materials:**

Doing a final walk-through allows you to get eyes on the property post-installation to check the quality of the job completed.
- 18. After walk-through, upload materials left over immediately on payroll or by filling out the material return list on Job Progress:**

Add extra wood costs to the total invoice. It's an additional \$65 per additional OSB over the two we provide for free.
- 19. Let the Finance Channel know if the customer is ready for financing (if using a financing option).**
- 20. Drop off unused materials at the shop from a given job.**
- 21. Have all payrolls, PC checklists, and final walk-throughs for the week done by Friday or Sunday at the latest. Get the guys to sign safety sheets once a week at the end of the week. When done, upload to G-chat (in crew safety meeting report submissions):**

Take an hour at the end of each Friday to check that all payrolls, PC checklists, and final walk throughs are completed for every job that week. If necessary, call customers who haven't paid.

## **Comprehensive Job Description**

### **Before the Job Starts**

Contact the customer by phone the day before and cover the following:

- Introduce yourself as the PC who will be handling their job and ensure the customer has your contact phone number.
- Go over the contract: shingle color, drip edge color, ventilation type, and any special instructions the sales person included.
- Instruct the customer what you need from them, move cars out of the way, etc.
- Ask if the customer has any specific questions, concerns or requests before the job starts.
- Tell the customer about the English speaker on the crew. Tell them his name and let them know that they can direct questions and concerns to him and that they can call you any time if they have concerns that they feel like the crew has not addressed.
- Set expectations for what time you will first get there and the amount of time you will spend there throughout the day.
- Ask them how often they would like you to check in with them by phone, and if they would like you to text them progress pics, etc.
- Tell them you will follow up by phone the day after the job is complete, and during that follow up call you will set an appointment within five business days to do a walk-through with them.
- Let them know that at that walk-through, after they are satisfied, you will collect a check.

### **During the Job**

Keep the customer informed, protect their interests:

- Show up on the job at the time you promised the day before.
- When you first arrive at a job, put a sign in the yard, check the material amounts and color to make sure it matches the work order.
- Take and upload to Job Progress the following required pictures:
  - Front of the house
  - Back of the house
  - Wood replacement
  - Sign in the yard
  - Magnets on the truck
  - Entire crew in uniform
  - Entire crew in fall protection safety gear.
- Take (or have the crew take) and upload as many pics of the important work progress steps as you are onsite for, ex. bare deck, ice and water shield, flashed areas, skylights, shingle progress, etc.

- Ensure the crew takes the required before and after pics of all wood replacement and uploads them into Job Progress.
- Text the customer the pics of the progress if they want that.
- Talk to the customer any time you see them.
- Check in with the customer by phone as discussed the day before.
- Make sure the workmanship is straight and neat, and that any sloppiness or damage that the customer could catch is caught and fixed.
- Make sure the roof is installed to manufacturer's specs.

Protect the customer's property and make sure that the crew:

- Cover the decks, sidewalks with OSB and tarps.
- Cover the railings with tarps.
- Cover all areas of yard and/or shrubbery, where shingles are falling, with tarps.
- Make sure covered shrubbery and landscaping doesn't get overloaded with shingle debris and get smashed.
- Cover the HVAC unit with OSB set at an angle so as not to block air flow.
- Make sure all the gutters are protected from ladders with stand offs or gutter protectors.
- Make sure the tarps don't stay on grass or shrubbery any longer than needed so they don't get burned by the heat.
- If possible, use a garden hose to spray landscaping and grass after tarps are removed to help prevent them from burning.

Ensure the crew has what it needs to work efficiently:

- Go over the work order and material list with the crew leader to make sure he understands any special instructions.
- Monitor the amount of unused material compared to the amount needed. Try to anticipate shortages.
- If shortages are caught, review all material carefully with the crew leader before leaving to get more - make sure you get everything you may need in one trip. (If you are unavailable, arrange for the crew to get their own supplies.)
- Communicate regularly with the crew leader and the office manager to keep the crew cranking out work as quickly as possible. Work to arrange the schedule so they can fit more in.

Keep the crew and the jobsite in compliance with Cenvar Policies:

- Make sure the crew does not waste material.
- Make sure the crew is in uniform.
- Make sure the crew is in properly adjusted fall protection, attached to properly installed anchor(s).
- Make sure the crew has magnetic Cenvar signs on their trucks.
- Make sure the shingle debris, the raw materials, and the unused tools are neatly arranged and not scattered all over the property, so that the jobsite looks neat and safe.

Knock on the doors of all houses adjacent to, behind, and across the street from the jobsite to introduce yourself. Give them a business card or door hanger and invite them to contact you if they have any issues that stem from our jobsite such as blowing trash or some other nuisance. In more rural areas, go to all homes within walking distance.

Complete go-backs and customer service calls on past jobs as GM assigns.

#### **Next day after the job**

- Call the customer the day after to make sure everything went well and address any immediate questions or concerns they may have. (if they have immediate problems or concerns, arrange to address them and do the walk-through ASAP)
- If they have no immediate concerns, set an appointment, based upon your upcoming geographic locations, to meet with the customer within the next 5 business days to do a walk-through with the customer.
- Remind the customer that at the walk-through after everything is taken care of, you will collect the check.

#### **At the Walk-Through**

- Check over everything with the customer; neatness of installation, clean up, property damage, etc.
- Make sure all of the leftover material has been picked up. If there is any there, load it on your truck and return it to Varcen or your branch.
- Perform a roof inspection.
- Address and fix any small problems they may have. Arrange to have any larger problems fixed, and then schedule another walk-through.
- Collect the check at the final walk-through after the customer is satisfied.
- Let the customer know that one of your key performance indicators is how many reviews you can get, because it helps us with our advertising. Tell them it would mean a lot to you if they would do a review for you, and then send them the Google review request.
- Fill out the Project Managers Job Site Checklist Form (in Job Progress) after the walk-through with the customer.