

JOB SETUP SOP TEMPLATE

A. Purpose

The Job Setup process defines how projects are established within Keeley's systems and organizational structure following project award or authorization to proceed. This process ensures project information, financial tracking structures, administrative requirements, and operational setup activities are completed consistently to support accurate reporting, compliance, project visibility, and readiness for execution.

B. Trigger(s):

The Job Setup process is initiated when a project is authorized to proceed and progresses through three primary phases: Job Setup, Estimating to Operations Hand-Off, and Job Start. Each phase is triggered by conditions that indicate readiness to move forward.

1. Job Setup
 - a. Project is awarded or approved to proceed, including receipt of an executed contract, Notice to Proceed (NTP), or equivalent authorization
 - b. Approved contract is communicated to the appropriate business unit

C. End State Objectives / Success Criteria

The Job Setup process is complete when project information has been transferred, aligned, and established within company systems. Success is achieved when the following conditions are met:

1. Project information is clearly transferred from estimating/preconstruction to operations, including:
 - a. Scope of work and assumptions
 - b. Budget and cost structure
 - c. Schedule expectations and key dates
 - d. Risks, gaps, and uncertainties
 - e. Key contacts, contract terms, and project requirements
 - f. Project start and end dates
2. Project is fully established within company systems, including:
 - a. Job number assigned
 - b. Required project information entered into CMiC
 - c. Cost codes and tracking structure established to support financial reporting

D. Process Flow (The process steps are the minimum requirements)

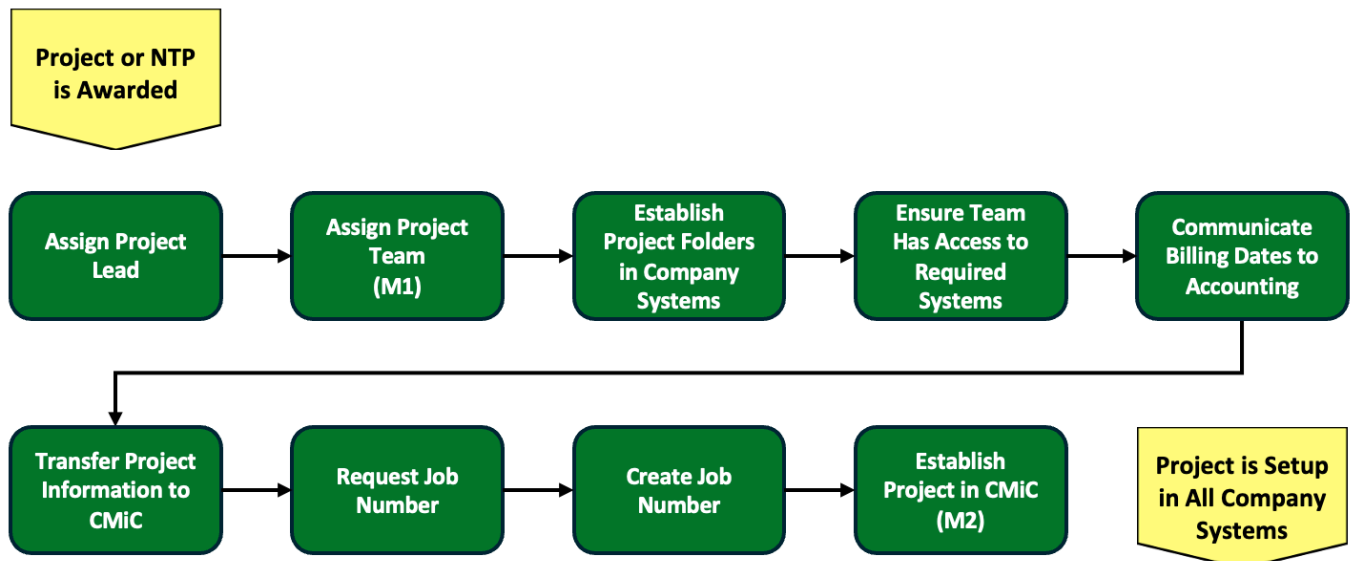
The Process Flow outlines how the Job Setup process progresses from project award through when a project is established in the appropriate. It highlights the key actions, system activities, and handoffs required to move a project from estimating/preconstruction into operations and field readiness.

1. Project Assignment & Initial Review

- a. Project Lead is assigned
- b. Project team is assigned based on project needs
- c. Project folders are established within the shared network
- d. Project Lead ensures their project team has access to required systems
- e. Project Lead to communicate billing date to accounting

2. Job Setup in CMiC (verbal approval kicks off set up – Keep trigger)

- a. Project information is transferred to CMiC from Salesforce
- b. Job number is requested by the project team (if not previously established)
- c. Job number is created and assigned within CMiC (if not previously established)
- d. Establish the project in CMiC by entering all required project information, including:
 - i. Project details (name, number, location)
 - ii. Project contacts
 - iii. Union/non-union designation
 - iv. Certified payroll requirements
 - v. Tax status
 - vi. Compliance attributes
 1. IRA
 2. Shines
 3. Etc.
 - vii. Billing date(s)



E. RACI Overlay (Responsibility Model)

The RACI Overlay defines how roles are structured across each activity, clarifying who is driving the work, who is ultimately answerable for its completion, and who needs to be engaged along the way. It reduces ambiguity in decision-making and ownership, which helps teams operate more efficiently and avoid delays or duplication of effort.

Responsible (1) – Performs the work to complete the activity or deliverable

Accountable (1) – The individual is ultimately answerable for the outcome of the activity

Consulted (>/= 1) – Roles who provide input, expertise, or guidance

Informed (>/=1) – Roles who are kept aware of progress or outcomes

N/A – Not applicable

Empty – No role assigned

TBD – To be determined

Process Step	Responsible	Accountable	Consulted	Informed
Assign Project Lead	BGL			
Assign Project Team (M1)	Project Lead	BGL	Ops Director	Estimator
Project Folders are established within the shared network	Project Lead	N/A	N/A	Project Accountant
Project Lead ensures the project team has access to required systems	Project Accountant Project Coordinator	Project Lead	N/A	N/A
Project Lead communicates billing date(s) to Accounting	Project Lead	N/A	N/A	Project Accountant
Project information is transferred to CMiC	Project Lead	BGL	Estimator Operational Finance Payroll	
Request Job Number, if not previously established	Project Lead	BGL	Estimator Operational Finance Payroll	N/A
Create Job Number, if not previously established	Financial Analyst	Project Lead	FBP	Project Coordinator Project Accountant

Process Step	Responsible	Accountable	Consulted	Informed
Enter project information in CMiC and other appropriate software platforms (M2)	Project Lead	BGL	Estimator Operational Finance Payroll	

F. Key Milestones

The Key Milestones define the critical control points within the Job Setup & Hand-Off process. These milestones represent measurable transition points where work is complete, information is aligned, and the project is ready to progress to the next phase.

#	Milestone	Description
M1	Project Team is Assigned	The Project Lead assigns the team based on project needs
M2	Project is Established in Company Systems	Project is set up within company systems to support financial tracking and administrative execution.

G. Documents (Suggested by Process Team or Industry Best Practice)

This section defines the key documents, templates, and tools that support execution of the Job Setup & Hand-Off process. These documents are intended to reinforce consistency, improve coordination, and mitigate identified risks related to unclear roles, inconsistent handoffs, system setup variability, and lack of standardized tracking across business units.

1. **Job Setup Checklist - Standardized Checklist to be utilized across all business units**
 - a. Defines required steps to establish a project in CMiC and internal systems
 - b. Ensures consistency in project setup and required field completion
 - c. Mitigates risk of incomplete or inconsistent system setup
2. **CMiC Job Setup Guide (Required Fields Reference)**

NOTE: Need to create a hyperlink to the instructions for this step to ensure this is done in a consistent manner across business units and all required fields are entered

 - a. Outlines required data fields and inputs for project setup in CMiC
 - b. Provides guidance on union status, payroll requirements, tax setup, and project attributes
 - c. Mitigates variability in system setup and data quality
3. **Project Folder Structure Template - To be created to utilize across all business units**
 - a. Defines a standard digital folder structure for all projects
 - b. Ensures consistency in document organization and accessibility
 - c. Mitigates risk of lost or difficult-to-locate project information