



## Preconstruction SOP Template

### A. Purpose:

The Preconstruction process establishes how awarded projects are transitioned from estimating into execution and prepared for mobilization, ensuring that project information, assumptions, and documentation are effectively transferred and coordinated across downstream teams to support a smooth transition into operations.

### B. Trigger(s):

1. Soft triggers (Pre-Award / Anticipated Award):
  - a. Project is short-listed for award
  - b. Project is identified within a “red zone” (high likelihood of award) in Salesforce
  - c. Client communication or internal alignment indicates a high likelihood of award (e.g., verbal award, letter of intent, or similar direction to proceed)
  - d. A mobilization timeline or preliminary start date is received, requiring early coordination and preparation
2. Hard triggers (Post-Award):
  - a. A fully executed contract or Limited Notice to Proceed (LNTP) is received

### C. End State Objectives / Success Criteria:

The Preconstruction process is complete when project information has been transferred, coordinated, and aligned across teams, and the project is prepared to begin execution. Success is achieved when the following conditions are met:

1. Project information, scope, assumptions, budget and cost structures, schedule expectations, risks and uncertainties, subcontract and procurement considerations, permitting status, safety and quality considerations and estimate details have been communicated and transferred from Estimating to Operations and appropriate downstream teams
2. A formal hand-off between Estimating and Operations has been completed, with key stakeholders aligned on project approach, expectations, and key execution considerations
3. Planning & Scheduling, Procurement, and Job Setup teams have received the required inputs, including scope, assumptions, and estimate information, to begin their respective processes
4. Subcontracting and procurement activities have been initiated in alignment with project scope, assumptions, and schedule requirements
5. Early-stage mobilization activities have begun, aligned with the project start date and overall execution approach

### D. Process Flow

The Process Flow outlines how Preconstruction activities progress in practice, including key actions, handoffs, and coordination between Preconstruction, Operations, and downstream teams. It reflects how projects transition from preconstruction into execution and are prepared for mobilization, while recognizing variability across teams based on project type, timing, and business unit practices.



### **1. Preconstruction Initiation**

- a. Preconstruction is initiated based on soft or hard triggers
- b. Transition from estimating to preconstruction phase is recognized and communicated to relevant stakeholders

### **2. Hand-Off Preparation and Scheduling**

- a. Hand-off meeting between Estimating and Project Lead is scheduled
- b. Key stakeholders are identified and included in the hand-off process

### **3. Hand-Off Information Transfer**

- a. Schedule formal hand-off meeting
- b. Conduct formal hand-off meeting between Estimating and Project Lead
  - i. Transfer project information, including: **(Information brought over from Job Estimate Setup)**
    - 1. Scope of work
    - 2. Assumptions
    - 3. Schedule expectations
    - 4. Risks and uncertainties
    - 5. Subcontract and procurement considerations
    - 6. Permitting status
    - 7. Safety considerations
    - 8. Quality considerations
    - 9. Owner and site-specific requirements
  - ii. Action items are identified, communicated and tracked following Hand-Off meeting

### **4. Budget Development and System Alignment (Brought over from Job Set Up Template)**

- a. Estimate is converted into a project budget across required systems
- b. Budget is uploaded into CMiC

### **5. Alignment and Execution Planning**

- a. Establish alignment between Estimating and Project Lead on:
  - i. Project approach
  - ii. Key execution considerations
  - iii. Assumptions impacting execution
  - iv. Labor cost and productivity
  - v. Tracking mechanisms – historical data
- b. Confirm understanding of project scope and expectations across stakeholders

## 6. Downstream Coordination

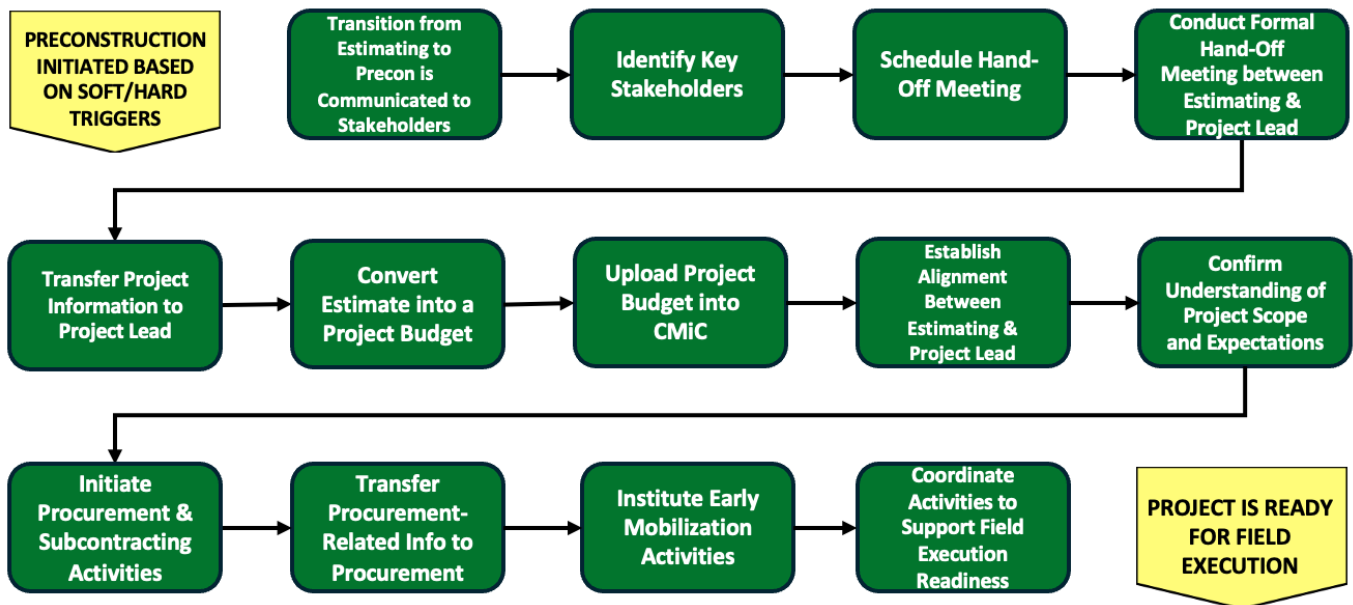
- a. Initiate coordination with downstream teams, including:
  - i. Planning & Scheduling
  - ii. Procurement
  - iii. Job Setup, Hand-Off, Start
- b. Transfer required project inputs to downstream teams to enable process initiation

## 7. Procurement and Subcontracting Initiation (I -7, 8, 9, 10, 22, 12)

- a. Initiate procurement and subcontracting activities based on project scope and timeline
- b. Transfer procurement-related information (e.g., subcontractor and supplier information) to Procurement

## 8. Mobilization Preparation

- a. Initiate early mobilization activities aligned with project start date
- b. Coordinate activities to support readiness for field execution



## E. Key Milestones

This section defines the critical checkpoints within the Preconstruction process that indicate readiness to move forward. These milestones align with key transition points, coordination efforts, and mobilization readiness, ensuring the project progresses from estimating into execution in a controlled and consistent manner.



#	Milestone	Description
M1	Preconstruction Initiated	Preconstruction phase is formally recognized and initiated based on defined triggers
M2	Conduct Hand-Off Meeting	Project information is formally transferred from Estimating to Operations
M3	Procurement Initiated	Procurement and subcontracting activities are started in alignment with project needs
M4	Mobilization Ready	Activities have been coordinated to begin field execution

**F. RACI Overlay**

The RACI Overlay defines who is Responsible (R), Accountable (A), Consulted (C), and Informed (I) at each stage of the Preconstruction process. It aligns directly to the Process Flow to ensure clarity of ownership across transition, coordination, and mobilization activities.

**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**

Activity / Process Steps	Responsible	Accountable	Consulted	Informed
Preconstruction is initiated based on soft or hard triggers (M1)	Estimating Lead	Estimating Management Team	Project Lead BGL	
Communicate transition from Estimating to Precon to stakeholders	Estimating Lead	Estimating Management	Project Lead	BGL
Key stakeholders are identified and included in the hand-off process	Estimating Lead	Estimating Management	Project Lead	BGL Scheduler
Schedule Hand-Off Meeting	Estimating Lead	Estimating Management	Project Lead	BGL Scheduler
Conduct Hand-Off Meeting (M2)	Estimating Lead	Estimating Management	Project Lead Ops Team	BGL
Transfer Project Information	Estimating Lead	Estimating Management	Project Lead	
Convert Estimate into a Project Budget				
Upload Project Budget into CMiC				
Establish alignment between Estimating and Project Lead	Estimating Lead	Estimating Management	Project Lead Super	BGL

Activity / Process Steps	Responsible	Accountable	Consulted	Informed
Confirm understanding of project scope and expectations across stakeholders	Estimating Lead	Estimating Management	Project Lead	
Initiate procurement and subcontracting activities based on project scope and timeline	Estimating Lead	Estimating Management	Scheduler Procurement	
Transfer procurement-related information to Procurement (M3)	Estimating Lead	Estimating Management	Scheduler Procurement	
Initiate Early Mobilization Activities	Project Lead	Project Lead Supervisor	Estimating Lead Super	BGL
Coordinate Activities to support readiness for field execution (M4)	Project Lead	Project Lead Supervisor	Estimating Lead Procurement Scheduler	BGL

## G. Documents

This section defines the key documents, templates, and tools that support execution of the Preconstruction process, providing practical resources to verify that key activities are completed, improve consistency across teams, and reduce the risk of gaps in handoff, coordination, and readiness for execution.

1. Estimating to Operations Hand-Off Template – **to be created and used across all business units**
  - a. Confirms transfer of scope, assumptions, estimate details, owner-site specific requirements and risks
  - b. Standardizes minimum expectations for hand-off quantity
2. Estimating to Operations Hand-Off Meeting Agenda – **(Expand on Project Summary/Estimate Overview for this)**
  - a. Establishes a consistent structure for discussing scope, assumptions, risks, estimate details and execution considerations
  - b. Ensures key topics are addressed and aligns stakeholders on project approach and expectations prior to transition
3. Procurement Turnover Log – **to be created and used across all business units**
  - a. Transfers subcontractor and supplier information to Procurement
4. Long-Lead Item Tracking Log – **to be created and used across all business units**
  - a. Identifies and tracks critical materials requiring early procurement