

Project Manager Job Description



Daily & Periodic Tasks

- Review the day's schedule.
 - Read daily logs on assigned projects from the night before.
 - Open *Method Operations Job Tasks to Complete To-Do* to discover any changes and prioritize tasks for action.
 - Update To-Do notes as needed.
 - Conduct a General Liability Insurance and Worker's Comp Certificate audit periodically (e.g., Quarterly).
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Lead Opportunity Management

- Conduct site visits delegated by the Sales Manager.
 - Update site visit notes to BuilderTrend when delegated by the Sales Manager.
 - Perform or acquire site analysis for Lead Opportunities entering active status.
 - Convert site analysis into a Chief Architect floor plan, determining the fidelity required.
 - Design new spaces, bathrooms, and kitchens as needed.
 - Generate customer 3D visualizations of significant spaces and features.
 - Design electrical layouts as needed.
 - Compile customer-facing Plans documents.
 - Work with designers to refine and approve designs.
 - Work with vendors to refine design and price Job materials for specific design elements.
 - Estimate tile coverage for use in Lead Proposal pricing and tile material ordering.
 - Compile Material List items from customer selections.
 - Participate in Installation Guide Reviews with the Operations Manager and Production Manager.
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Active Job Management

- Complete the Project checklist, ensuring all items in the Material List have been selected and accounted for.
- Follow up within 24 hours on open items with customers under contract.
- Update the Material List to drive the open items to zero.
- Compile the Installation Guide for individual spaces, including floor plans, fixtures, finishes, and specific work plans for plumbing, tile, and electrical elements.

- Schedule and conduct Online or In-Person meetings with customers and/or designers to present design options, gather material selections, and address ongoing progress for the Job.
 - Order Job materials as early in the process as practicable.
 - Track material orders to gather expected delivery dates and critical-path dependencies.
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Project Documentation & Logistics

- Check in new materials on the Material List.
 - Input new Lead Opportunity information.
 - Create new Presale Jobs not yet linked to the Lead Opportunity.
 - Design custom project elements, such as cabinetry solutions.
 - Maintain the Material List template document.
 - Maintain the Proposal Calculations template document.
 - Prepare and Submit permit applications for active Jobs.
 - Schedule and participate in permit reviews.
 - Adjust and resubmit permit applications as needed.
 - Follow up with Vendors on expected delivery dates as needed.
 - Create Change Orders as needed (Shared with Sales Manager).
 - Create Invoices as needed (Shared with Sales Manager).
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Communication & Scheduling

- Schedule Site Visits and Online Meetings.
- Participate in the Scheduling Meeting with the Operations Manager.
- Send a bi-weekly "Touchpoint Email" to every customer in "Not Started" or "Working" status.
- Send the same bi-weekly email touchpoint for each sold job still in the "planning" stage.
- Alternate weeks for touchpoint emails between Lead Opportunities (and Pre-sale Jobs) and sold Jobs.
- Follow up within the touchpoint email by highlighting when waiting on quotes, design work, or customer decisions.