



# **ELECTRI International**

## **ELECTRI Research Update: Standard Operating Procedures**



# Setting Up the Project for Success with Standard Operating Procedures (SOPs)

Presenter:

Hala Nassereddine, Ph.D.

# Format of Council Room Sessions

We encourage you to ask questions and share your own experiences.

If you have questions, go to the reactions button at the bottom of the screen in Zoom and raise your hand or type questions directly into the chat box.

Stay on mute until your name is called after you raise your hand.





# **ELECTRI**

## **Setting Up the Project for Success with Standard Operating Procedures (SOPs)**



# The Team

## Task Force

- Michael Parkes  **O'CONNELL**  
ELECTRIC COMPANY
- Mike Abbott 
- Joe Gesino 

## **ELECTRI** **ELECTRI** INTERNATIONAL

- Josh Bone
- Amanda Harbison
- Laura Holmes



# What are SOPs?

**Standard Operating Procedures (SOPs)** are documented guidelines and instructions that an organization or an individual follows to perform a task of a process in a consistent and standardized manner.



# Why SOPs

**Inconsistency  
breeds  
inefficiency.**



# Why SOPs

- Consistency
- Efficiency
- Training Tool
- Compliance and Safety
- Set-up the project for success



# Project Deliverables

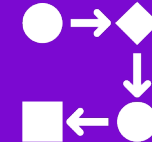
## SOP for SOPs

Learn more about about SOP through this infographic.

SOP for  
SOPs



Generated  
SOPs &  
Tools



## Generated SOPs & Tools

Access generated SOPs and associated tools for specific activities.

Project  
Deliverables

## SOP-Pro Tool

Generate SOPs using the SOP Production Tool.



SOP-Pro  
Tool

Field Activities  
SOP



## Construction Activities SOP

Access a template to generate SOPs specifically for construction field activities.



# SOP for SOPs



**Standard Operating Procedures (SOPs)** are documented guidelines and instructions that an organization or an individual follows to perform a task of a process in a consistent and standardized manner.

## Why use SOP?

1. **Consistency:** SOP ensures tasks are performed the same way every time.
2. **Efficiency:** SOP saves time, resources, and reduces errors.
3. **Training Tool:** SOP helps new employee understand their job functions.
4. **Compliance and Safety:** SOP adheres to regulations and ensures safety.
5. **Set-up the project for success:** SOP provide a common vision for how projects are to be executed.

## Phases to create an SOP

1. The Initiation Phase
2. The Planning Phase
3. The Development Phase
4. The Implementation Phase

## What to include?

- Title
- Scope
- Users
- Definitions
- Roles and Responsibilities
- Procedure Steps
- Revision History
- Appendices

SOPs should be living documents, updated regularly to ensure ongoing efficiency, consistency, and regulatory compliance.

## SOP Format

- Written Procedures
- Flowcharts or Diagrams
- Checklists
- Videos
- Interactive E-Learning Modules
- Infographics



# SOP for SOPs

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**ELECTRIE INTERNATIONAL**  
REINVENTING THE WORKPLACE  
Prepared by NCM Consulting, LLC

SOP for  
SOPs



Generated SOPs  
& Tools



SOP  
Recordings

SOP-Pro  
Tool



Field Activities  
SOP



## The Initiation Phase



### Vision

- Recognize the need for updating or creating SOPs.
- Evaluate impact of non-standardized procedures.
- Define clear vision for new SOPs.
- Communicate vision to stakeholders.

- Gain stakeholder consensus on SOPs' necessity and benefits.
- Lead discussions to agree on SOPs' key elements and goals.

### Consensus



### Motivations

- Grasp individual and team motivations for SOP changes.
- Emphasize SOPs' benefits on efficiency, safety, and quality.

- Identify skills needed for SOP development, implementation, and adherence.
- Assess the existing skill set.

### Skills



### Resources

- Assess resources needed for SOP planning, development, and implementation.
- Allocate resources for efficient SOP development.

- Utilize SOP infographic for planning, development, and implementation.
- Define roles, responsibilities, and timelines for SOP production.

### Action Plan



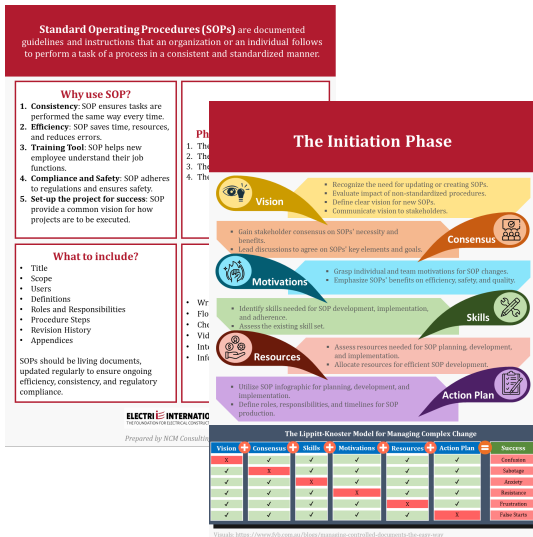
## The Lippitt-Knoster Model for Managing Complex Change

Vision	+	Consensus	+	Skills	+	Motivations	+	Resources	+	Action Plan	=	Success
X		✓		✓		✓		✓		✓		Confusion
✓		X		✓		✓		✓		✓		Sabotage
✓		✓		X		✓		✓		✓		Anxiety
✓		✓		✓		X		✓		✓		Resistance
✓		✓		✓		✓		X		✓		Frustration
✓		✓		✓		✓		✓		X		False Starts

Visuals: <https://www.fyb.com.au/blogs/managing-controlled-documents-the-easy-way>



# SOP for SOPs



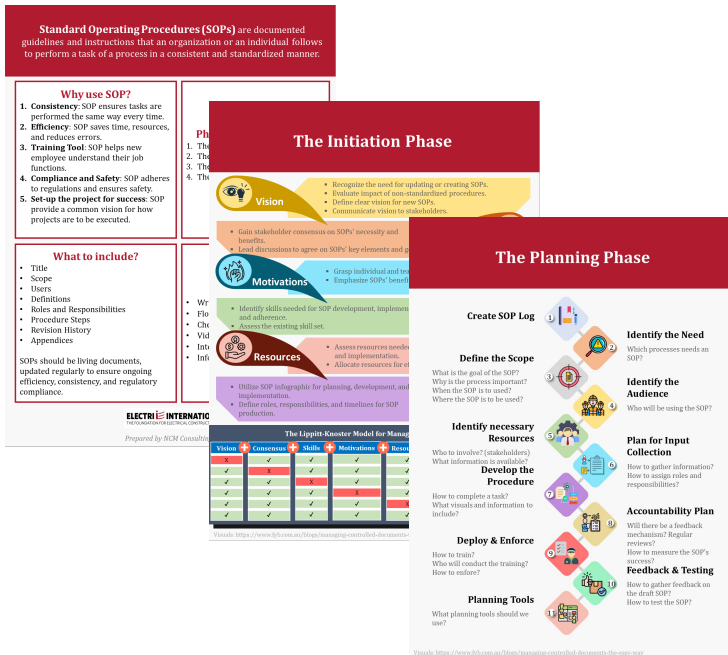
## The Planning Phase





# SOP for SOPs

## The Development Phase



1

### Collect Input

Gather data per the planning phase



2

### Decide on Format

Written Procedures, Flowcharts or Diagrams, Checklists, Videos, Interactive E-Learning Modules, Infographics, Process Maps, etc.



3

### Draft the SOP

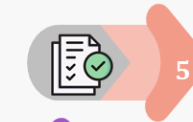
Title, Purpose, Scope, Definitions, Roles and Responsibilities, Procedure Steps, Revision History, Appendices



4

### Review First Draft

Expert review  
Novice review  
User feedback



5

### Refine the SOP

Revision based on feedback  
Pilot test  
Multiple reviews as needed



6

### Train & Implement

Introduction plan to users  
Training materials  
Training sessions/workshops



7

### SOP Updates & Management

Regular SOP checks  
Feedback mechanism



8

### Distribution & Enforcement

SOP storage  
Accessibility  
Enforcement policy



9

### Finalize the SOP

Approval  
Implementation readiness





# SOP for SOPs

## The Implementation Phase

Standard Operating Procedures (SOPs) are documented guidelines and instructions that an organization or an individual follows to perform a task of a process in a consistent and standardized manner.

### Why use SOP?

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SOPs should be living documents, updated regularly to ensure ongoing efficiency, consistency, and regulatory compliance.

## The Initiation Phase

- Recognize the need for updating or creating SOPs.
- Evaluate impact of non-standardized procedures.
- Define clear vision for new SOPs.
- Communicate vision to stakeholders.

- Gain stakeholder consensus on SOPs' necessity and benefits.
- Lead discussions to agree on SOPs' key elements and goals.

- Group individuals and teams.
- Emphasize SOPs' benefits.

- Identify skills needed for SOP development, implementation, and adherence.
- Assess the existing skill set.

- Assess resources needed and implementation.
- Allocate resources for SOP development.

- Utilize SOP development for planning, development, and implementation.
- Define roles, responsibilities, and timelines for SOP development.

- Define the goal of the SOP?
- Why is the process important?
- When the SOP is to be used?
- Where the SOP is to be used?

- Identify necessary resources
- Who to involve? (stakeholders)
- What information is available?

- Develop the Procedure
- How to complete a task?
- What visuals and information to include?

- Deploy & Enforce
- How to train?
- Who will conduct the training?
- How to monitor?

- Planning Tools
- What planning tools should we use?

- The Lightbulb-Kanban Model for Managing Controlled Documents

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## The Planning Phase

## The Development Phase

### Identify necessary Resources

### Develop the Procedure

### Deploy & Enforce

### Planning Tools

### Train & Implement

### Distribution & Enforcement

### Collect Input

### Draft the SOP

### Refine the SOP

### SOP Updates & Management

### Finalize the SOP

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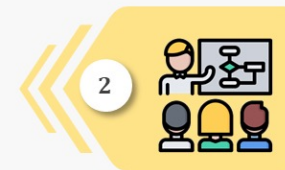
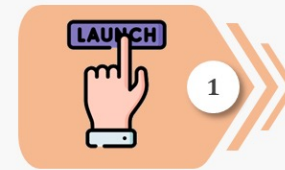
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## Train SOP users

Different training methods  
Addressing misunderstanding  
Clarifying SOP details



## Deploy the SOP

Communicate:

- Why SOP matters
- What's expected from users
- SOP location
- Measurement of SOP's success
- Emphasis on continuous improvement

Answer questions

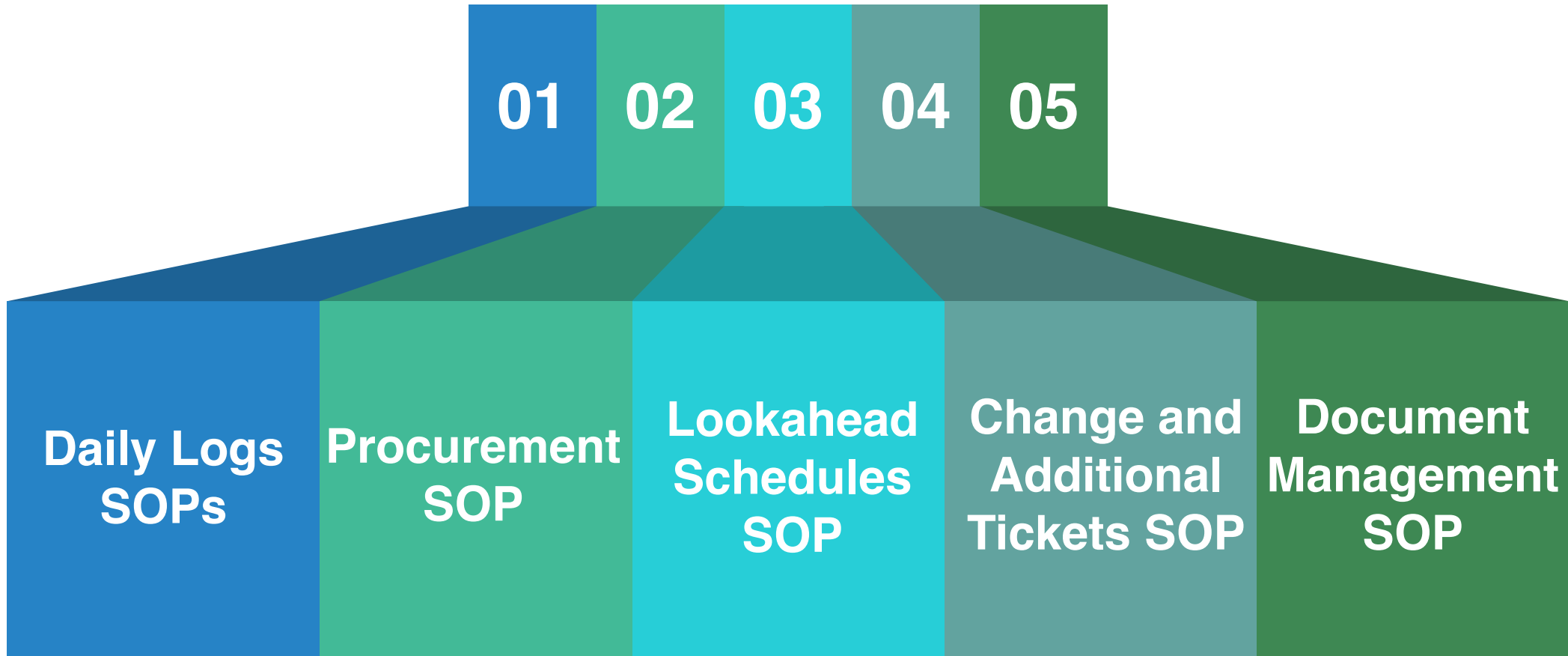
## Execute accountability plan

Communicate the roles and responsibilities formally  
Setting up reminders for SOP review  
Launch, promote, monitor, and respond to feedback  
Track metrics and report them to stakeholders





# SOPs for 5 Essential Activities





# SOPs for 5 Essential Activities

01

## Daily Logs SOPs

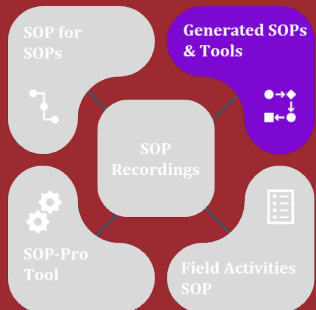
Scope:	The <i>Daily Log SOP</i> outlines the information that needs to be captured in a Daily Log at the end of a working day. The purpose is to establish a standardized method to ensure consistency, efficiency, and transparency in project execution.
Why:	<ol style="list-style-type: none"><li>1. Maintain good documentation and accountability.</li><li>2. Ensure quality control.</li><li>3. Enhance communication and collaboration.</li><li>4. Serve as valuable evidence in dispute resolution.</li><li>5. Improve project monitoring and decision-making.</li><li>6. Increase knowledge retention for future projects.</li><li>7. Provide the means to train new team members.</li></ol>
Users:	The Daily Log is to be completed by the Field Leader.





# Daily Logs SOP

- Project Information
- Project Conditions
  - Weather
  - Team
    - Your Company Manpower
    - Subcontractors
    - Visitors
    - Equipment/Tooling
  - Safety





# Daily Logs SOP

- Project Information
- Project Conditions
- Project Status
  - Activities
  - Materials
  - Productivity
    - Working space
    - Changes
    - Production
    - Materials/Equipment/Tools
    - Information





# Daily Logs SOP

- Project Information
- Project Conditions
- Project Status
- Signature





# Daily Logs SOP

- Informational SOP – Word Document
- Fillable Excel Form
- Fillable PDF Form





# Daily Logs SOP

AutoSave On 1: Daily Logs\_v4\_F.docx - Word - Last Modified: 10/25/2023

File Home Insert Draw Design Layout References Mailings Review View Developer Help BLUEBEAM Acrobat

Clipboard Font Paragraph Styles Find Replace Select Editing Create PDF and Share link Adobe Acrobat Create PDF and Share via Outlook Request Signatures Dictate Voice Sensitivity Editor Add-ins Batch PDF Bluebeam

Navigation

Search document

Headings Pages Results

Project Information

Project Conditions

Weather

Team

Your Company Manpower

Subcontractors

Visitors

Equipment/Tooling

Safety

Project Status

Activities

Materials

Productivity

Working space

Schedule

Changes

Production

Materials/Equipment/Tools

Information

Signature

## Daily Log SOP

**Scope:** This SOP outlines the information that needs to be captured in a Daily Log at the end of a working day. The purpose is to establish a standardized method to ensure consistency, efficiency, and transparency in project execution.

**Why:**

1. Maintain good documentation and accountability.
2. Ensure quality control.
3. Enhance communication and collaboration.
4. Serve as valuable evidence in dispute resolution.
5. Improve project monitoring and decision-making.
6. Increase knowledge retention for future projects.
7. Provide the means to train new team members.

**User:** The Daily Log is to be completed by the Field Leader.

### Project Information

- ☐ Job name.
- ☐ Job number.
- ☐ Job location.
- ☐ Date.
- ☐ Start & Finish Time.
- ☐ Daily log completed by:

### Project Conditions

Page 1 of 5 638 words Text Predictions: On Accessibility: Good to go

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SOP for  
SOPs

Generated SOPs  
& Tools

SOP  
Recordings

SOP-Pro  
Tool

Field Activities  
SOP



# Daily Logs SOP Excel Form



AutoSave On 1\_Daily Logs\_v4\_Fillable.xlsx • Last Modified: January 20

File Home Insert Page Layout Formulas Data Review View Automate Developer Help BLUEBEAM Acrobat

Paste Font Alignment Number

A174 Inadequate crew size

Daily Log SOP												
Scope:	This SOP outlines the information that needs to be captured in a Daily Log at the end of a working day. The purpose is to establish a standardized method to ensure consistency, efficiency, and transparency in project execution.											
Why:	1.Maintain good documentation and accountability. 2.Ensure quality control. 3.Enhance communication and collaboration. 4.Serve as valuable evidence in dispute resolution. 5.Improve project monitoring and decision-making. 6.Increase knowledge retention for future projects. 7.Provide the means to train new team members.											
User:	The Daily Log is to be completed by the Field Leader.											
Project Information												
Job name:							Job number:					
Job location:							Date:					
Start Time:							Finish Time:					
Daily log completed by:												
Project Conditions												
Weather												
Temperature:							Precipitation:					
Humidity:							Windspeed:					
Notes (Elaborate on any weather-related issues that impacted the work):												
Team												
Your Company Manpower												
Name	Rank (i.e., foreman, journeyman, inspector, etc.)	Cost Code (if available)	Work Location	Hours	Hours missed	Overtime Hours	Notes					

Sheet1



# Daily Logs SOP – PDF Form

## Daily Log SOP

Scope:	This SOP outlines the information that needs to be captured in a Daily Log at the end of a working day. The purpose is to establish a standardized method to ensure consistency, efficiency, and transparency in project execution.
Why:	<ol style="list-style-type: none"><li>1. Maintain good documentation and accountability.</li><li>2. Ensure quality control.</li><li>3. Enhance communication and collaboration.</li><li>4. Serve as valuable evidence in dispute resolution.</li><li>5. Improve project monitoring and decision-making.</li><li>6. Increase knowledge retention for future projects.</li><li>7. Provide the means to train new team members.</li></ol>
User:	The Daily Log is to be completed by the Field Leader.

Project Information			
Job name:		Job number:	
Job location:		Date:	
Start Time:		Finish Time:	
Daily log completed by:			

Project Conditions			
Weather			
Temperature:		Precipitation:	
Humidity:		Windspeed:	
Notes (Elaborate on any weather-related issues that impacted the work):			





# SOPs for 5 Essential Activities

02

## Procurement SOP

Scope:	The <i>Procurement SOP</i> establishes a standardized process for procurement on a construction project.
Why:	<ol style="list-style-type: none"><li>1. Streamline the procurement process.</li><li>2. Provide better visibility into the process and responsible parties.</li><li>3. Increase time efficiency.</li><li>4. Increase transparency and accountability.</li><li>5. Provide the means to train new team members.</li></ol>
Users:	This Procurement SOP is to be used by Electrical Contractor Personnel involved in the procurement process (including estimators, Project Managers, Field Leaders, Pre-fab managers, Purchasing Agents, and Warehouse Managers).
Tools:	<p>Two interactive Excel tools are provided with this SOP:</p> <ul style="list-style-type: none"><li>▪ Vendor Evaluation Tool (VET): A tool designed to evaluate different vendors.</li><li>▪ Excess Materials Handling Tool: A tool designed to facilitate the decision-making on how to handle excess materials on a construction project.</li></ul>





# Procurement SOP

- Informational SOP – Word Document
- Vendor Evaluation Tool (VET) – Excel Tool
- Excess Materials Handling Tool – Excel Tool





# Procurement SOP

AutoSave On 2: Procurement\_v4\_F (woProductMaturity).docx - Word - Last Modified: March 3

File Home Insert Draw Design Layout References Mailings Review View Developer Help BLUEBEAM Acrobat

Read Mode Print Layout Web Layout Draft Views Focus Immersive Reader Page Movement Vertical Side to Side Ruler Gridlines Navigation Pane Show Zoom 100% One Page Multiple Pages Page Width New Window Arrange All Split View Side by Side Synchronous Scrolling Switch Windows Macros Properties Comments Editing Share

Navigation Search document

Headings Pages Results

Acronyms Notes

- Understand your project and materials.
  - Step 1: What project characteristics are present?
  - Step 2: What materials to procure?  
OUTCOME:
  - Step 3: How much to procure?  
OUTCOME:
  - Step 4: When to procure?  
OUTCOME:
- Source materials
  - Step 5: Where to procure?
    - Options to choose from:  
OUTCOME:
  - Procure Materials
- Execution
  - Material Order
    - Step 6: How to purchase?
  - Material Delivery
    - Step 7: Where and how to deliver?
  - Material Return
    - Step 8: How to return?
  - Change
    - Step 9: How to handle changes?

## Procurement SOP

**Scope:** This SOP establishes a standardized process for procurement on a construction project.

**Why:**

1. Streamline the procurement process.
2. Provide better visibility into the process and responsible parties.
3. Increase time efficiency.
4. Increase transparency and accountability.
5. Provide the means to train new team members.

**Users:** This Procurement SOP is to be used by Electrical Contractor Personnel involved in the procurement process (including estimators, Project Managers, Field Leaders, Pre-fab managers, Purchasing Agents, and Warehouse Managers)

**Tools:** Two interactive excel tools are provided with this SOP:

- Vendor Evaluation Tool (VET): A tool designed to evaluate different vendors.
- Excess Materials Handling Tool: A tool designed to facilitate the decision-making on how to handle excess materials on a construction project.

### Acronyms

E: Estimator	PA: Purchasing Agent
PM: Project Manager	V: Vendor
FL: Field Leader	W: Warehouse Manager
PR: Pre-fab Manager	S: Surplus Scrap Dealer

### Notes

- Project has been awarded.
- The "Understand" and "Source" phases depend on the time available to plan for the project after award.
- "Procurement" is added as separate entity here. Could be removed or modified for organizations that don't have a separate purchasing department.
- This format was used so that contractors can easily tweak the list of activities as well as modify the engagement of the different stakeholders.

Page 1 of 11 2161 words Text Predictions: On Accessibility: Investigate

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SOP for  
SOPs

Generated SOPs  
& Tools

SOP  
Recordings

SOP-Pro  
Tool

Field Activities  
SOP



# Vendor Evaluation Tool



VENDOR NAME:

REST

QUALIFICATIONS

Weight

Factor	Assessment Level					
	Level 0	Level 1	Level 2	Level 3	Level 4	Level 5
Past Experience	No Information	Very Dissatisfied	Dissatisfied	Neutral	Satisfied	Very Satisfied
Reliability	No Information	Very Unreliable	Unreliable	Neutral	Reliable	Very Reliable
Reputation in the Industry	No Information	Very Poor Reputation	Poor Reputation	Neutral Reputation	Good Reputation	Excellent Reputation
Geographic Coverage	No Information	Very Limited Coverage	Limited Coverage	Adequate Coverage	Good Coverage	Excellent Coverage
0.0% Total Sum of Weights must be equal to 100%						

SERVICES

Weight

Factor	Assessment Level					
	Level 0	Level 1	Level 2	Level 3	Level 4	Level 5
Storage   Space	Not Needed/Required	No storage Services Provided	Limited Amount of Storage			Adequate Amount of Storage
Storage   Cost	Not Needed/Required	No storage Services Provided	Expensive			Cost Effective
Delivery	Not Needed/Required	Significantly Delayed	Occasionally Delayed			Consistently on Time
Kitting & Staging	Not Needed/Required	No Kitting/Staging Services Provided	Basic kitting/Staging			Advanced kitting/Staging
Price Competitiveness	Non-Decision Factor	Always uncompetitive	Rarely Competitive		Competitive	Very Competitive
Materials Management System   platform	Not Needed/Required	No MMS used	Compatible/Integrable with Contractor			Compatible/Integrable with Contractor
Materials Management System   User Experience	Non-Decision Factor	No MMS used	Not very user-friendly			User-friendly
Extended Warranties   Manufacturer	Non-Decision Factor	Not Offered	Minimal Extension			Optimal Extension
Extended Warranties   Distribution	Non-Decision Factor	Not Offered	Passing on Manufacturer Warranty			Additional offer to Manufacturer Warranty
Early Payment/Cash Discounts	Non-Decision Factor	Not Offered	Standard Industry Terms			Customer-Specific Terms
On-Site Material Handling	Not Needed/Required	Not Offered	Basic Services			Advanced/Software managed Services
0.0% Total Sum of Weights must be equal to 100%						

Get Scores

Transfer to Database

Save as PDF

VENDOR'S ASSESSMENT

Total Qualification Score

Total Services Score

Total Score

INSTRUCTIONS

ENABLE MACROS

1 | Provide Vendor Name

2 | Assign a weight for QUALIFICATIONS and SERVICES

3 | Assign weights for each factor under QUALIFICATIONS and SERVICES

4 | Select an Assessment Level for each factor

5 | Get Score

6 | Transfer to Database

7 | Save as PDF

8 | Reset Assessment

\* On a scale of 100%, how important are QUALIFICATIONS when selecting a vendor

\* On a scale of 100%, how important are SERVICES when selecting a vendor

\* Both weights should add up to 100%

\* To select an assessment level, double click the corresponding cell.

\* For example, double clicking on D12 will highlight "No Information"

\* To "unselect" an assessment, right click the corresponding cell and the highlight will disappear.

\* Click on Get Score to compute your vendor's evaluation score.

\* Click on Transfer to Database to transfer your assessment to the Database Sheet

\* Click on Save as PDF to save your assessment as PDF. File will be saved in the same folder as the tool

\* Click on Reset to clear your assessment and start a new one.

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THE FOUNDATION FOR ELECTRICAL CONSTRUCTION INC.

Prepared by NCM Consulting, LLC



Qualifications						Weight	
Weight	Factor	Assessment Level					
		Level 0	Level 1	Level 2	Level 3	Level 4	Level 5
	Past Experience	No Information	Very Dissatisfied	Dissatisfied	Neutral	Satisfied	Very Satisfied
	Reliability	No Information	Very Unreliable	Unreliable	Neutral	Reliable	Very Reliable
	Reputation in the Industry	No Information	Very Poor Reputation	Poor Reputation	Neutral Reputation	Good Reputation	Excellent Reputation
	Geographic Coverage	No Information	Very Limited Coverage	Limited Coverage	Adequate Coverage	Good Coverage	Excellent Coverage
0.0%	Total Sum of Weights must be equal to 100%						

SERVICES					Weight	
Weight	Factor	Assessment Level				
		Level 0	Level 1	Level 2		
	Storage   Space	Not Needed/Required	No storage Services Provided	Limited Amount of Storage	Competitive	Adequate Amount of Storage
	Storage   Cost	Not Needed/Required	No storage Services Provided	Expensive		Cost Effective
	Delivery	Not Needed/Required	Significantly Delayed	Occasionally Delayed		Consistently on Time
	Kitting & Staging	Not Needed/Required	No Kitting/Staging Services Provided	Basic kitting/Staging		Advanced kitting/Staging
	Price Competitiveness	Non-Decision Factor	Always uncompetitive	Rarely Competitive		Very Competitive
	Materials Management System   platform	Not Needed/Required	No MMS used	Not Compatible/Integrable with Contractor		Compatible/Integrable with Contractor
	Materials Management System   User Experience	Non-Decision Factor	No MMS used	Not very user-friendly		User-friendly
	Extended Warranties   Manufacturer	Non-Decision Factor	Not Offered	Minimal Extension		Optimal Extension
	Extended Warranties   Distribution	Non-Decision Factor	Not Offered	Passing on Manufacturer Warranty		Additional offer to Manufacturer Warranty
	Early Payment/Cash Discounts	Non-Decision Factor	Not Offered	Standard Industry Terms		Customer-Specific Terms
	On-Site Material Handling	Not Needed/Required	Not Offered	Basic Services	Advanced/Software managed Services	
0.0%	Total Sum of Weights must be equal to 100%					



# Vendor Evaluation Tool



Vendor Evalutaion Tool									
VENDOR NAME:		VENDOR TEST							
RESET									
QUALIFICATIONS								Weight	40.0%
Weight	Factor	Assessment Level							
		Level 0	Level 1	Level 2	Level 3	Level 4	Level 5		
30.0%	Past Experience	No Information	Very Dissatisfied	Dissatisfied	Neutral	Satisfied	Very Satisfied		
40.0%	Reliability	No Information	Very Unreliable	Unreliable	Neutral	Reliable	Very Reliable		
20.0%	Reputation in the Industry	No Information	Very Poor Reputation	Poor Reputation	Neutral Reputation	Good Reputation	Excellent Reputation		
10.0%	Geographic Coverage	No Information	Very Limited Coverage	Limited Coverage	Adequate Coverage	Good Coverage	Excellent Coverage		
100.0%									
SERVICES								Weight	60.0%
Weight	Factor	Assessment Level							
		Level 0	Level 1	Level 2			Level 5		
4.0%	Storage   Space	Not Needed/Required	No storage Services Provided	Limited Amount of Storage			Adequate Amount of Storage		
10.0%	Storage   Cost	Not Needed/Required	No storage Services Provided	Expensive			Cost Effective		
20.0%	Delivery	Not Needed/Required	Significantly Delayed	Occasionally Delayed			Consistently on Time		
6.0%	Kitting & Staging	Not Needed/Required	No Kitting/Staging Services Provided	Basic kitting/Staging			Advanced kitting/Staging		
10.0%	Price Competitiveness	Non-Decision Factor	Always uncompetitive	Rarely Competitive	Competitive		Very Competitive		
5.0%	Materials Management System   platform	Not Needed/Required	No MMS used	Not Compatible/Integrable with Contractor			Compatible/Integrable with Contractor		
15.0%	Materials Management System   User Experience	Non-Decision Factor	No MMS used	Not very user-friendly			User-friendly		
5.0%	Extended Warranties   Manufacturer	Non-Decision Factor	Not Offered	Minimal Extension			Optimal Extension		
5.0%	Extended Warranties   Distribution	Non-Decision Factor	Not Offered	Passing on Manufacturer Warranty			Additional offer to Manufacturer Warranty		
5.0%	Early Payment/Cash Discounts	Non-Decision Factor	Not Offered	Standard Industry Terms			Customer-Specific Terms		
15.0%	On-Site Material Handling	Not Needed/Required	Not Offered	Basic Services			Advanced/Software managed Services		
100.0%									
Get Scores								Transfer to Database	Save as PDF
VENDOR'S ASSESSMENT									
Total Qualification Score			Total Services Score			Total Score			
16.80%			19.20%			36.00%			



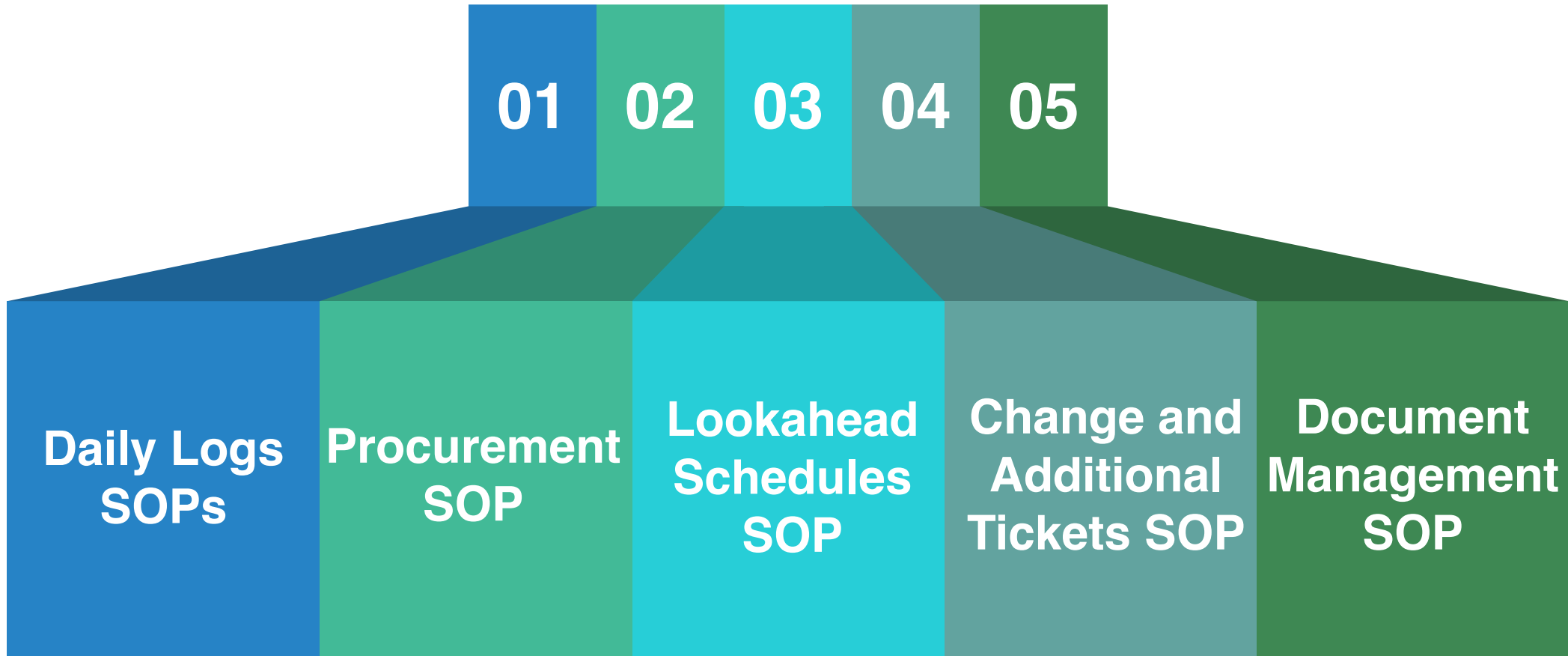
# Vendor Evaluation Tool - Database

DATABASE					QUALIFICATIONS				SERVICES										
Vendor		Total Qualification Score	Total Services Score	Total Score	Past Experience	Reliability	Reputation in the Industry	Geographic Coverage	Storage   Space	Storage   Cost	Delivery	Kitting & Staging	Price Competitiveness	Materials Management System platform	Materials Management System   User Experience	Extended Warranties   Manufacturer	Extended Warranties   Distribution	Early Payment /Cash Discounts	On-Site Material Handling
TEST 1	Weight	40%	60%	100%	30%	40%	20%	10%	4%	10%	20%	6%	10%	5%	15%	5%	5%	5%	15%
	Assessment	17%	19%	36%	No Information	Unreliable	Excellent Reputation	Adequate Coverage	Not Needed/Required	No storage Services Provided	Occasionally Delayed		Competitive	Not Compatible/Integrable with Contractor		Minimal Extension	Additional offer to Manufacturer Warranty	Standard Industry Terms	Not Offered
TEST 2	Weight	40%	60%	100%	30%	40%	20%	10%	4%	10%	20%	6%	10%	5%	15%	5%	5%	5%	15%
	Assessment	17%	19%	36%	No Information	Unreliable	Excellent Reputation	Adequate Coverage	Not Needed/Required	No storage Services Provided	Occasionally Delayed		Competitive	Not Compatible/Integrable with Contractor		Minimal Extension	Additional offer to Manufacturer Warranty	Standard Industry Terms	Not Offered





# SOPs for 5 Essential Activities





# SOP for Construction Activities

## Construction Activity SOP – The *ITTEM* Template

<b>Scope:</b>	Provide a description of the scope
<b>Why:</b>	1. Add why this SOP is important 2. Add why this SOP is important 3. Add why this SOP is important
<b>Users:</b>	Define SOP users.

### I – Information

<What **Information** is needed to complete the activity?>

### T – Team

<Who is the on **Team**? Identify all stakeholders that are involved with the activity?>

### T – Tools

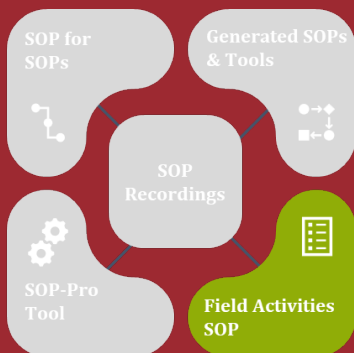
<What **Tools** are needed to complete the activity?>

### E– Equipment

<What **Equipment** is needed to complete the activity?>

### M– Materials

<What **Materials** and **Material Management Activities** are needed?>





# SOP-PRO Tool

- The SOP-Production Tool is designed to:
  - Streamline the creation of SOPs
  - Centralize SOPs





# SOP-PRO Tool

AutoSave Off SOPPro Tool\_fv7 (example).xism Search Nassereddine, Hala NH Comments Share

File Home Insert Draw Page Layout Formulas Data Review View Automate **Developer** Help BLUEBEAM Acrobat

Visual Basic Macros Record Macro Use Relative References Macro Security Code Add-ins Excel Add-ins COM Add-ins Insert Design Mode Properties View Code Run Dialog Source Map Properties Import Expansion Packs Export Refresh Data XML

A14

**SOP-Pro**  
**SOP Production Tool**

Total SOPs  
6

View List of SOPs

Create New SOPs

View Summary of SOPs

Home SOPList +

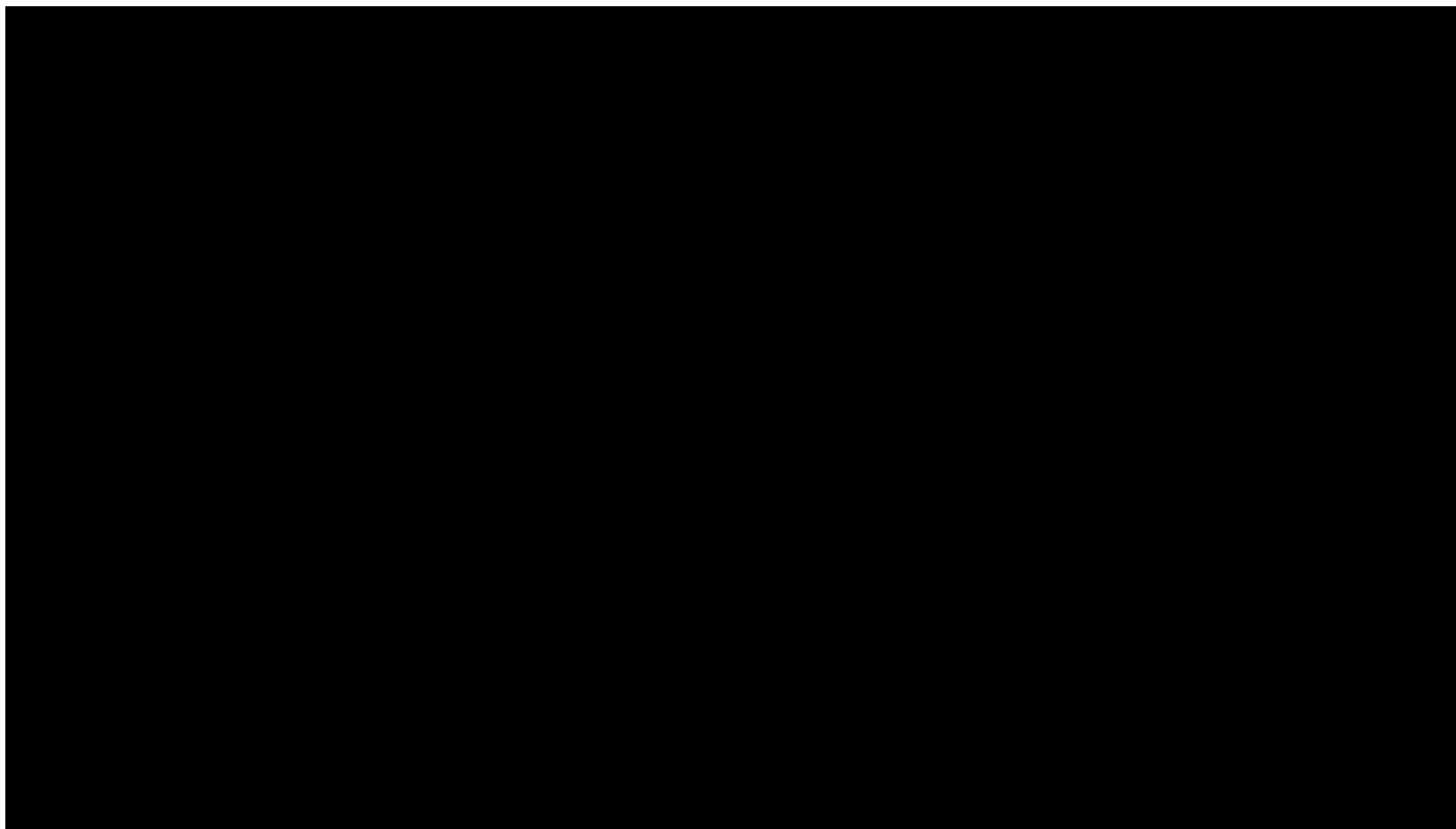
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# Final Report





# Final Report

## Standard Operating Procedures (SOP)

Setting Up the Project for Success with Standard Operating Procedures (SOPs)

*This report presents an overview of the project.*



# Q&A

THANK YOU!