
THE D&C BIBLE

Integrated Management System

The complete operating manual for a Design & Construct project management company. Every role, every checklist, every safety regulation, every payment term, every meeting protocol — in one document. Customise the `{{double-braced}}` fields with your company's details, review with your team, and put a copy on the wall.

CPM Pro

Complete Project Management Pro

app.cpmpro.app

IMS Edition 2026.05 · 24 parts

Tailored to: Withheld

This IMS has been generated for the project below. The body of the document still uses generic {{double-brace}} placeholders for company-wide fields — fill those in once for your organisation, then re-use across every project's IMS download.

Project

Field	Value
Project name	Withheld
Project code	—
Address	—
Client	Withheld
Contract value	—
Site start	—
Practical Completion (target)	—
Operating region	AU

Builder

Field	Value
Company name	JEFFBUILD DESIGN AND CONSTRUCT
ABN / company number	—
Region	AU

CUSTOMISATION REMINDER

The Appointed Person box on every job description page (Parts 4-7) is where you write the specific employee's name, qualifications and current tickets / licences. Use the editable DOCX version of this IMS if you want to type the answers in Word rather than handwriting them on a printed copy.

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PART 1

How to use this document

This is the operating manual for your D&C project management company. It only works if everyone reads it, agrees on it, and updates it. Treat it like the safety manual — alive, controlled, signed off.

1.1 · What this document is

An Integrated Management System (IMS) brings together everything an organisation needs to operate safely, profitably, and consistently. Quality (ISO 9001), Safety (ISO 45001), and Environment (ISO 14001) are the traditional three pillars. We add a fourth: Project Management itself — how jobs flow from lead to handover, who's responsible at every step, what's checked when, and how the books balance at the end.

The result is a single document that lets a new project manager land on Monday, read this on Monday afternoon, and run a job on Tuesday. It lets a CFO see how money moves. It lets a site worker know exactly what's expected today. It lets an auditor walk in and find evidence in 5 minutes.

1.2 · The `{{double-braces}}` convention

Anything inside double braces is a customer fill-in. Examples:

- `{{Company Name}}` — your trading name (e.g. "Henderson Constructions Pty Ltd")
- `{{ABN}}` — your Australian Business Number (or NZBN / VAT number etc.)
- `{{Director Name}}` — the named director who signs off this document
- `{{Region}}` — your primary operating region (NSW, VIC, QLD, etc.)
- `{{Bank Account}}` — the trading bank account for trade payables
- `{{Insurance Broker}}` — your insurance broker's contact details

SAVE ONCE, SEARCH GLOBALLY

Open this PDF in Acrobat or Preview. Search for double-brace to find every fill-in field. Replace them with your details — once. Save as your company's IMS v1.0. Re-render from CPM Pro whenever the template updates and merge changes.

1.3 · Version control & sign-off

The IMS is a controlled document. Every change must be recorded so a worker can never act on an out-of-date copy. The minimum control set:

- **Version number** — increment major (1.0 ' 2.0) for sectional rewrites; minor (1.0 ' 1.1) for content tweaks; patch (1.1.0 ' 1.1.1) for typo fixes.
- **Date issued** — the date the new version replaces the old.
- **Approved by** — director or nominated representative who signs the change off.
- **Change log** — one-line per change at the back of this document.
- **Distribution list** — who got a copy, when, and how they acknowledged receipt.

1.4 · Review cycle

Schedule a full IMS review at minimum annually. Plus trigger an immediate review whenever any of these happen:

- Notifiable WHS incident on site
- Major regulation change (new state act, code update)
- Significant org structure change (new senior hire, ownership change)

PART 1 · HOW TO USE THIS DOCUMENT

- Substantial project type expansion (e.g. moving into civil from fitout)
- External audit finding (ISO surveillance, insurer audit, client audit)

1.5 · Distribution & acknowledgement

Every person on the org chart receives a copy of this document, plus the relevant extracts for their role. They sign acknowledging they've received it, read it, and will work within it. The acknowledgement template is in Appendix A.

Who gets what

Role	Receives	Required reading
Director / MD	Full IMS	All 24 parts
CFO	Full IMS	Parts 4, 9, 10, 12, 20
Project Manager	Full IMS	Parts 5, 8, 9, 12, 17
Estimator	Full IMS	Parts 5, 9, 10, 11
Design Lead	Full IMS	Parts 5, 8, 17
Contracts Admin	Full IMS	Parts 5, 12, 20
Site Manager	Full IMS	Parts 6, 13, 14, 15, 17, 23
Site Supervisor	Full IMS	Parts 6, 13, 14, 15
Foreman	Field extract	Parts 6, 13, 14, 15, 23
Tradesman / Subbie	Field extract	Parts 14, 15, 16
Site Worker	Field extract	Parts 14, 15
Apprentice	Field extract + RTO docs	Parts 14, 15, 21
WHS Officer	Full IMS	Parts 7, 14, 15, 16, 18
Office Admin	Full IMS	Parts 7, 20, 21

1.6 · Where the live data lives

This document is the PROCESS. The DATA lives in CPM Pro. When this document says "raise a variation", CPM Pro is where you raise it. When it says "check the safety library", CPM Pro is where it lives. We've included Part 24 specifically to map each process step to the CPM Pro screen / tool that supports it.

1.7 · This document does not replace legal advice

The safety regulations, payment terms, and employment-law content in this document are accurate at the date of publication for the jurisdictions named, but laws change and individual circumstances vary. Confirm with a registered

PART 1 · HOW TO USE THIS DOCUMENT

professional before relying on any specific clause for a contract, insurance claim, or employment dispute. The IMS is a management tool — not legal advice.

COMMON PITFALL

Builders sometimes treat their IMS as a marketing folder — printed once, never opened, brought out only when an auditor asks. That defeats the entire purpose. A living IMS gets thumbprints, dog-eared pages, scribbled margin notes. If yours is spotless after 12 months, nobody is using it.

PART 2

D&C philosophy & company purpose

Design & Construct is a single-point delivery model. The same firm carries both the design responsibility and the construction responsibility. This part explains why that's powerful, what it demands of us, and the values we operate by.

2.1 · What "Design & Construct" actually means

In a traditional construction model, the client appoints an architect or engineer to produce a design, then puts that design out to tender. Builders price the documents, one wins, and they build to specification. Risk is split: the designer carries design risk, the builder carries construction risk, and the client carries coordination risk.

In a Design & Construct model, the client engages ONE firm to deliver both the design and the construction. That firm carries all design and construction risk under one contract. The client gets a single throat to choke — and the contractor gets a single throat to think with.

2.2 · Why D&C wins

- **Speed.** Design and construction overlap. While we're finishing detailed design on level 3, we're framing level 1. End-date moves left.
- **Buildability.** The builder controls the design from day one. Beams get sized to what's available next Tuesday at Stratco, not what looks good on paper.
- **Cost certainty.** One fixed-price contract. Variations are limited to client-initiated scope changes, not designer-builder disputes.
- **Simpler client experience.** One contract, one invoice schedule, one person to call when something's wrong.
- **Margin.** Done well, D&C lets us capture design fee AND construction margin in the same job. Done badly, we wear both design AND construction risk and lose both.

2.3 · Why D&C is hard

- You need DESIGN CAPABILITY in-house or under tight retainer — not all builders have this
- You're responsible for fit-for-purpose, not just compliance with documents
- Errors compound — a design mistake becomes a construction defect becomes a warranty claim
- You need contracts that actually transfer design liability to your sub-consultants — most don't
- Professional Indemnity insurance is mandatory and expensive (typically AU\$5k-25k/yr depending on turnover)

2.4 · Our company values

(CUSTOMISE — these are starter values. Replace with your own. Whatever you choose, live them out every day or take them down off the wall.)

- {{Value 1: e.g. Safety above schedule, always}}
- {{Value 2: e.g. Build it like it's your own house}}
- {{Value 3: e.g. Margin matters — we don't apologise for it}}
- {{Value 4: e.g. Tell the client the truth, even when it's expensive}}
- {{Value 5: e.g. Pay subbies on time — every time}}

2.5 · What we DON'T do

Saying no is as important as saying yes. (CUSTOMISE.) Examples to consider:

PART 2 · D&C PHILOSOPHY

- Projects under {{minimum project value}} — overhead eats margin below that line
- Hourly rates / cost-plus — we price fixed, we wear the risk, we earn the margin
- Demolition-only or cleaning-only contracts — outside our wheelhouse
- Heritage work without a specialist consultant on the team
- Clients who won't pay a deposit or sign a contract before site mobilisation

2.6 · Company mission

(CUSTOMISE.) A mission statement is one sentence that explains why you exist beyond making money. Example: "**{{Company Name}}** delivers commercial fitouts in **{{Region}}** that are on time, on budget, and built to last — protecting our clients' brand, our subbies' livelihoods, and our own reputation."

2.7 · How we measure success

We track ten KPIs every month. If we win on these, the company wins. Each KPI has an owner, a target, and a place where it's reported live.

KPI	Target	Owner	Reported in
Lost-time injuries (LTI)	0	WHS Officer	Safety dashboard
Notifiable incidents	0	WHS Officer	Safety dashboard
Active projects on schedule	>= 85%	Project Director	Portfolio Gantt
Average project margin	>= 18%	CFO	Accounting dashboard
Defects per project at PC	< 15	PM (per job)	Defects register
Subbie payment days	<= 30	Bookkeeper	Aged payables
Client NPS (post-handover)	>= 8/10	Project Director	Client survey
Quote acceptance rate	>= 35%	Estimator	Estimates dashboard
Repeat-client revenue	>= 40%	Director	Annual report
Apprentice retention (12-mo)	>= 80%	Director	HR review

2.8 · The five non-negotiables

Some things are not subject to discussion, regardless of project pressure, client relationship, or commercial gain:

- 1. Nobody works on site without a current induction + JSA acknowledgement.** Doesn't matter who they are or how senior.
- 2. Nobody works at heights without fall protection.** No exceptions, no "just for a minute".
- 3. No work begins on a project without a signed contract.** Verbal agreements aren't binding and never collect.
- 4. No variation is performed without written client approval.** If you do the work without paperwork, you'll wear the cost.
- 5. Subbies and suppliers are paid within terms — every time.** Cash flow problems are management problems, not their problem.

PART 3

Organisational structure

The org chart is the first thing a new hire asks for. This part shows the full structure, the reporting lines, the decision authority matrix, and how the structure scales as the company grows.

3.1 · The org chart

A D&C company has three vertical functions (Design, Delivery, Finance) and three horizontal supports (WHS, QA, Admin). The default structure below assumes a mid-size firm with 10-30 staff. Smaller firms collapse roles; larger firms split them.

The default structure

- **Managing Director / Owner** — strategy, sign-off, ultimate accountability
- **Chief Financial Officer (CFO)** — money, contracts, banking, BAS, payroll
- **Project Director** — overall portfolio, hiring, performance reviews
- **Project Manager x n** — one per active job (or per 2-3 small jobs)
- **Site Manager** — full-time on a single major job
- **Site Supervisor / Foreman** — day-to-day site control
- **Tradesman / Subcontractor** — engaged per package
- **Site Worker / Apprentice** — direct employees on the job
- **Design Lead** — internal architect / engineer or principal consultant
- **Drafter / Drafter** — production drawings, BIM modelling
- **Estimator** — quantity surveys, pricing, tenders
- **Contracts Administrator** — variations, EOTs, progress claims, subbie contracts
- **WHS Officer** — safety library, induction, incident response, audits
- **QA/QC Lead** — ITPs, inspections, defects, handover
- **Office Administrator** — phones, ordering, document control, HR admin
- **Bookkeeper** — AP, AR, payroll, BAS prep

3.2 · How the structure scales

Stage	Headcount	Typical structure
Sole trader	1	One person wears every hat. Use CPM Pro to make this manageable.
Micro	2-4	Director + estimator + 1-2 site staff. Bookkeeping outsourced.
Small	5-10	Add full-time PM, site manager, casual admin.
Mid	10-30	Full structure above. WHS + QA + design split into dedicated roles.
Established	30-100	Multiple PMs per Project Director. CFO with reports. In-house design team.

PART 3 · ORG STRUCTURE

Tier-2 contractor	100+	Regional offices. Dedicated estimating department. Construction Director.
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3.3 · Decision authority matrix

Who can sign off what. This is the document a new hire reads to know what they can approve unilaterally vs what needs to escalate.

Decision	Owner	Limit	Escalates to
Hire / fire staff	Director	—	Board
Sign a contract	Director	—	Board > \$5M
Approve a variation	Project Manager	\$10k	Project Director > \$10k
Sign a purchase order	Project Manager	\$25k	Director > \$25k
Engage a subcontractor	Project Manager	\$100k	Director > \$100k
Approve a progress claim	CFO	—	Director > \$250k
Pay an invoice (AP)	Bookkeeper	\$5k	CFO > \$5k, Director > \$50k
Cease site work for safety	Anyone on site	—	WHS Officer (immediate)
Order materials for site	Site Manager	\$5k	PM > \$5k
Hire equipment (e.g. crane)	Site Manager	\$2.5k/day	PM > limit
Approve overtime	Site Manager	8 hrs/wk	PM > limit
Cancel / postpone delivery	Site Manager	—	Notify PM
Variation > \$50k	Director	—	Board > \$250k
EOT claim	PM + CFO joint	—	Director > 20 days

3.4 · Communication channels

- **Site ' office:** CPM Pro daily diary, plus 5 pm phone call PM " Site Manager
- **Office ' site:** CPM Pro project chat OR text for time-critical
- **Client communication:** ALWAYS in writing (email or CPM Pro client portal). Phone follow-ups documented in CPM Pro correspondence log within 24 hr.
- **Subcontractor coordination:** Weekly Gantt email auto-sent from CPM Pro every Monday 6 am
- **Emergency on site:** Site Manager calls PM + WHS Officer + Director simultaneously. WHS leads response.

3.5 · Hours of work & on-call

- Standard office hours: {{e.g. 7am-4pm Mon-Fri}}
- Standard site hours: {{e.g. 7am-3pm}} ({{Region}}) permitted hours under {{relevant council}}

PART 3 · ORG STRUCTURE

- On-call rotation: Director and one PM are on-call alternate weeks for after-hours site emergencies
- Saturday work: only if pre-approved by client + neighbour notification served + extra penalty rates apply
- Sunday / public holiday work: directors' approval required, double-time rates, neighbour notification 7 days prior

PART 4

Job descriptions — Leadership & Finance

Director, CFO, Project Director. The three roles that own the company's strategy, money, and people. Every job description ends with a daily / weekly / monthly / yearly checklist.

4.1 - Managing Director / Owner

APPOINTED PERSON — fill in for your company

Employee name: _____

Date appointed: _____ Employment type: _____

Qualifications held: _____

Current tickets / licences (number + expiry):

Signed (employee): _____ Date: _____

Signed (Director): _____ Date: _____

Purpose

Sets company strategy, signs off major decisions, carries ultimate legal accountability under WHS law, contract law, and corporations law. The buck stops here.

Reports to

Board of Directors (if any), shareholders, the law

Responsibilities

- Approve annual budget, strategy, and capital expenditure
- Sign all contracts above the Project Director's authority limit
- Lead client relationships at executive level — they expect to talk to you
- Carry primary WHS officer duty under {{state WHS Act}} — non-delegable
- Approve every hire above Site Supervisor level
- Chair monthly leadership meeting + quarterly strategy review
- Sign off the company's annual financial statements
- Maintain Builders Licence in good standing; never let it lapse
- Build and maintain the bank relationship — guarantee facility, overdraft, project finance
- Represent the company publicly — industry bodies, awards, media

Deliverables

- Annual strategy plan (one page)
- Monthly leadership meeting agenda + minutes
- Signed director's WHS commitment statement (renewed annually)

JOB DESCRIPTION

- Personally signed builder's licence renewal annually

KPIs

- Company profitability e {{target margin}}%
- Cash on hand e {{e.g. 60}} days of operating expense
- No notifiable WHS incidents
- Builders licence + insurance current
- Director PI + Public Liability current

Tickets / licences required by law

Mandatory in {{Region}}. Verify currency annually. Confirm regulator-current wording — laws vary by state / country and change over time.

- Builders Licence — class to match scope (NSW: Open Builder; QLD: Builder Open; VIC: DB-U; WA: Builders Practitioner)
- Public + Products Liability insurance — min \$20M
- Professional Indemnity insurance (D&C exposure)
- Director ID (AU) — mandatory since November 2022

Recommended (not mandatory)

- AICD Company Directors Course (governance training)
- Whitecard / CSCS card (for site visits)

Daily

- Read every email flagged 'Director' in CPM Pro by 8 am
- Stand-up with Project Director — 10 minutes
- Stand-up with CFO — 10 minutes (cash position + AR/AP status)
- Walk one site per week minimum — visibility matters
- Reply to every client email personally within 24 hrs

Weekly

- Review portfolio Gantt in CPM Pro — flag any project off-schedule by > 5 days
- Review accounting dashboard — projected month-end cash, forecast revenue
- 1-on-1 with each direct report (15 min each)
- Sign / approve all over-limit POs + variations in CPM Pro inbox
- Review safety dashboard for new incidents, near-misses, audit findings

JOB DESCRIPTION

Monthly

- Chair leadership meeting (1st Monday)
- Sign monthly BAS / GST return
- Review monthly P&L vs budget; investigate any variance > 10%
- Personally review at least one site induction + JSA pack — confirm currency
- Review subbie + client NPS scores
- Approve next month's recruitment plan

Yearly

- Set + publish annual strategy + budget (one month before financial year start)
- Renew Builders Licence + PI + PL + workers comp + plant insurance
- Annual IMS review + sign-off (this document)
- Submit financial statements to auditor
- Performance review every direct report
- Industry conference / training — at least one significant event per year

4.2 - Chief Financial Officer (CFO)

APPOINTED PERSON — fill in for your company

Employee name: _____

Date appointed: _____ Employment type: _____

Qualifications held: _____

Current tickets / licences (number + expiry):

Signed (employee): _____ Date: _____

Signed (Director): _____ Date: _____

Purpose

Owns the money. Cash flow, banking, payables, receivables, payroll, BAS, contracts on the commercial side, insurance, and financial reporting. The person who answers 'can we afford to start that job?'

Reports to

Managing Director

Responsibilities

- Daily cash position tracking — bank balance vs forecasted AP / AR
- Approve every progress claim before it goes out (sanity check + claim history)
- Approve every supplier / subbie payment over \$5k
- Run weekly payroll — Wednesday processing for Thursday pay
- Quarterly BAS / GST return preparation + lodgement
- Monthly P&L per project + portfolio rollup — distributed to leadership by 5th of month
- Annual financial statements + tax return preparation (with external accountant)
- Insurance renewals (PI, PL, plant, workers comp, motor) — never lapse
- Bank facility management — overdraft limit, project finance, equipment loans
- Contract risk review before signing — termination clauses, payment terms, security of payment compliance

Deliverables

- Daily cash position report (1-line email)
- Monthly P&L per project (5th of month)
- Quarterly BAS lodgement (within 28 days of quarter end)

JOB DESCRIPTION

- Annual financial statements (within 90 days of year end)
- Insurance schedule (annually updated)

KPIs

- Days sales outstanding (DSO) d 45 days
- Days payable outstanding (DPO) within terms (no late payments to subbies)
- Average project margin e {{target}}%
- BAS lodged on time — zero late lodgements
- Insurance currency 100% — zero lapses

Tickets / licences required by law

Mandatory in {{Region}}. Verify currency annually. Confirm regulator-current wording — laws vary by state / country and change over time.

- Tax agent registration if lodging on behalf of others (TPB-registered, AU)
- BAS agent registration if preparing BAS for fee (TPB-registered, AU)

Recommended (not mandatory)

- CPA Australia or CA ANZ membership
- Cert IV in Bookkeeping (BSB40520)
- Xero / MYOB / QuickBooks ProAdvisor certification

Daily

- Check bank balance vs forecasted week's payments — flag any shortfall
- Review yesterday's invoices, receipts, bills in CPM Pro Accounting
- Approve any AP > \$5k from the queue
- Quick chat with Bookkeeper — anything chasing?

Weekly

- Run weekly payroll (Wed processing, Thu pay)
- Update cash flow forecast for next 8 weeks
- Review aged debtors — call any over 60 days personally
- Review aged creditors — confirm all within terms
- Sign all progress claims for the week
- Review the integrations sync log — Xero in step

JOB DESCRIPTION

Monthly

- Publish monthly P&L per project + rollup
- Reconcile bank, credit card, petty cash
- Generate accountant pack for end-of-month closing
- Review insurance — any new equipment / personnel needing cover?
- Review subbie compliance vault — any expiries within 30 days?

Yearly

- Coordinate external audit / annual tax return
- Renew all insurances — PI, PL, plant, workers comp, motor
- Review banking facility — refinance / renegotiate if rates moved
- Submit fringe benefits tax (FBT) return if applicable
- Review pricing benchmarks — does our margin target still match market?

4.3 - Project Director

APPOINTED PERSON — fill in for your company

Employee name: _____

Date appointed: _____ Employment type: _____

Qualifications held: _____

Current tickets / licences (number + expiry):

Signed (employee): _____ Date: _____

Signed (Director): _____ Date: _____

Purpose

Owns the portfolio. Allocates work across PMs, hires + develops project staff, sets project management standards, and is the escalation point for any project gone sideways.

Reports to

Managing Director

Responsibilities

- Allocate new jobs to the right PM based on workload, skill match, sector experience
- Weekly review of every active project's status — flag risk + intervene early
- Lead recruitment + onboarding of project staff (PMs, Site Managers, Estimators)
- Performance reviews for project staff — quarterly + annual
- Maintain the company's project management standards — this IMS is the artefact
- Sit in on every monthly client review meeting (at minimum the first one of a job)
- Mediate disputes between PMs and subcontractors / consultants
- Drive lessons-learned process at project close — what would we do differently?
- Own the project P&L portfolio target
- Be the first responder to any major site incident — at site within 2 hours if practical

Deliverables

- Weekly portfolio status report to Director
- Project allocation log
- Lessons-learned register (continuously maintained)

JOB DESCRIPTION

- Project Manager succession plan

KPIs

- Average project margin e {{target}}% across portfolio
- Projects on schedule e 85%
- Project staff retention e 90% over 24 months
- Lost client jobs (cancellation + non-completion): 0

Tickets / licences required by law

Mandatory in {{Region}}. Verify currency annually. Confirm regulator-current wording — laws vary by state / country and change over time.

- Builders Licence (or nominated supervisor for the company licence)
- Whitecard / CSCS / equivalent — current
- First Aid (HLTAID011) — refreshed every 3 years

Recommended (not mandatory)

- Diploma of Project Management (BSB50820) or Cert IV Building & Construction
- Cert IV WHS (BSB41419)

Daily

- 9 am stand-up with all PMs — round-robin status (5 min each)
- Review CPM Pro portfolio Gantt — any project red?
- Walk to each PM's desk once — visibility, not surveillance
- Address any escalations from PMs within 4 hrs

Weekly

- Walk every active site at least once (multi-day jobs)
- 1-on-1 with each PM (30 min)
- Sign off pre-start meeting minutes for every new project
- Review subbie performance reports — any consistent failures?
- Review estimator pipeline — what's coming in next month?

Monthly

- Attend at least one client review per project
- Run portfolio-wide lessons-learned review (last Friday)
- Review every PM's pipeline + workload — rebalance if any PM > 4 active projects
- Salary review windows: half-yearly recommendation to Director

JOB DESCRIPTION

Yearly

- Full performance review every direct report
- Annual project management training plan (CPD)
- Industry award submissions (HIA, MBA, Property Council)
- Annual update of this IMS chapter on project management standards

PART 5

Job descriptions — Project Delivery

The four roles that turn an awarded contract into a built building. Project Manager, Estimator, Design Lead, Contracts Administrator. The engine room of a D&C company.

5.1 - Project Manager (PM)

APPOINTED PERSON — fill in for your company

Employee name: _____

Date appointed: _____ Employment type: _____

Qualifications held: _____

Current tickets / licences (number + expiry):

Signed (employee): _____ Date: _____

Signed (Director): _____ Date: _____

Purpose

Owns one or more projects from contract award to handover. Single point of contact for the client. Manages programme, budget, subbies, quality, safety, and communication.

Reports to

Project Director

Responsibilities

- Lead the project kick-off meeting and stand up the project in CPM Pro
- Build + maintain the project programme (Gantt) — re-baseline at every major milestone
- Run weekly site meeting + monthly client review
- Engage subcontractors per the awarded package list
- Raise + manage variations through to client approval
- Submit progress claims monthly
- Track project costs vs budget weekly — flag overruns immediately
- Manage site safety in conjunction with Site Manager + WHS Officer
- Coordinate design team to ensure RFIs answered within 5 business days
- Run defects close-out + handover process

Deliverables

- Project execution plan (PEP) — finalised within 2 weeks of award
- Weekly site meeting minutes
- Monthly client report + invoice

JOB DESCRIPTION

- Defect-free handover certificate at PC
- Lessons-learned submission at project close

KPIs

- Project on schedule (within {{e.g. 5}} days of baseline)
- Project margin e {{target}}% on completion
- Variations approved before work starts: 100%
- Subbie payments within terms: 100%
- Client satisfaction NPS e 8/10 at PC

Tickets / licences required by law

Mandatory in {{Region}}. Verify currency annually. Confirm regulator-current wording — laws vary by state / country and change over time.

- Whitecard / CSCS / equivalent
- First Aid (HLTAID011) — every 3 years
- Builder's Licence if performing the role under a sole nominee structure

Recommended (not mandatory)

- Cert IV Building & Construction (CPC40120) or Diploma (CPC50220)
- Apple Pencil + iPad for site markup

Daily

- Read site diary entries from yesterday in CPM Pro
- Phone Site Manager 8 am for status (5 min)
- Address any RFIs or design queries in inbox
- Approve any subbie POs / variations in CPM Pro queue
- Update tomorrow's schedule if anything slipped

Weekly

- Chair weekly site meeting (typically Tue 7 am)
- Reconcile spent vs budgeted in CPM Pro project accounting
- Submit progress claim if monthly cycle is due
- Confirm next week's deliveries + subbie attendance via Send Gantt email
- Update programme if anything significant shifted
- Review safety dashboard for this project

JOB DESCRIPTION

Monthly

- Chair monthly client review meeting
- Issue formal monthly report to client (cost, schedule, safety, quality)
- Sit down with PM Director for portfolio review
- Review variations register — any open > 30 days needs chasing
- Forecast project completion date + final account value

Yearly

- Attend at least 2 industry CPD events
- Maintain personal builders' licence / professional registration
- Complete annual safety refresher + first aid renewal

5.2 - Estimator

APPOINTED PERSON — fill in for your company

Employee name: _____

Date appointed: _____ Employment type: _____

Qualifications held: _____

Current tickets / licences (number + expiry):

Signed (employee): _____ Date: _____

Signed (Director): _____ Date: _____

Purpose

Prices new work. Reads tender documents, measures quantities, sources subbie + supplier prices, builds the estimate, recommends a markup, and produces the proposal. The person who decides what we charge.

Reports to

Project Director

Responsibilities

- Review every incoming RFQ within 48 hrs — accept / decline / clarify
- Take off quantities from drawings (or BIM model via Revit/IFC import)
- Source 3 quotes per significant package — never single-source over \$50k
- Build the estimate in CPM Pro using the standard pricebook + project-specific overrides
- Recommend markup + contingency based on risk profile
- Present estimate to Director for sign-off before issue
- Produce branded proposal PDF + present to client
- Maintain the pricebook — update unit rates quarterly + after every job close-out
- Track quote acceptance rate — feed back what wins + what doesn't
- Hand over awarded estimates to PM with full pricing transparency

Deliverables

- Costed estimate per RFQ, within agreed turnaround
- Quarterly pricebook refresh
- Quote pipeline + win-rate report (weekly)

JOB DESCRIPTION

- Handover pack to PM at award

KPIs

- RFQ response time: d 5 business days
- Quote acceptance rate: e {{e.g. 35}}%
- Estimate-to-actual variance at completion: within 5%
- Pricebook freshness: < 90 days old

Tickets / licences required by law

Mandatory in {{Region}}. Verify currency annually. Confirm regulator-current wording — laws vary by state / country and change over time.

- Whitecard / CSCS (for site visits)

Recommended (not mandatory)

- AIQS (Australian Institute of Quantity Surveyors) membership
- Cert IV Building & Construction (Estimating) (CPC40320)
- Bluebeam Revu certification

Daily

- Review incoming RFQs first — accept / decline within 2 hrs
- Update active estimates in progress
- Chase outstanding subbie + supplier prices
- Read industry news for material price movements

Weekly

- Submit completed estimates to Director for sign-off (Thu)
- Issue proposals to clients (Fri)
- Update pipeline report (Mon)
- 1-on-1 with Project Director on pipeline + workload

Monthly

- Pricebook update — rates from this month's awarded subbie contracts
- Review unsuccessful tenders — debrief + write up lesson
- Win-rate analysis by sector / client / size

Yearly

- Full pricebook rebuild (use awarded contract data from last 12 months)
- Update markup + contingency policy based on portfolio profitability
- Industry pricing benchmarking (Rawlinsons / Cordell)

5.3 - Design Lead

APPOINTED PERSON — fill in for your company

Employee name: _____

Date appointed: _____ Employment type: _____

Qualifications held: _____

Current tickets / licences (number + expiry):

Signed (employee): _____ Date: _____

Signed (Director): _____ Date: _____

Purpose

Owns design responsibility under the D&C contract. Engages and coordinates sub-consultants (structural, MEP, hydraulic, fire, acoustic). Reviews shop drawings. Issues design changes via formal RFI / Site Instruction.

Reports to

Project Director

Responsibilities

- Develop concept + DD + tender documentation for each project
- Engage sub-consultants under back-to-back design liability terms
- Coordinate clash detection across structural / MEP / fire / facade packages
- Review and approve shop drawings before fabrication
- Respond to site RFIs within 5 business days
- Issue Site Instructions for design changes — track via variations register
- Sign off as-built drawings at PC
- Maintain CAD / Revit / IFC files in CPM Pro design library
- Verify all designs meet relevant codes ({{NCC, AS Standards, BCA, local council}})
- Maintain personal CPD + design registration

Deliverables

- Full design package per project per stage
- Coordinated clash report (clash count + resolution log)
- RFI register

JOB DESCRIPTION

- As-built drawings at PC

KPIs

- RFI response time: d 5 business days
- Design-driven variations: d 2% of contract value
- Clashes detected at site (not in coordination): minimal
- Compliance failures at certification: 0

Tickets / licences required by law

Mandatory in {{Region}}. Verify currency annually. Confirm regulator-current wording — laws vary by state / country and change over time.

- Architects Registration ({{Region}}) OR Engineers Australia membership (relevant discipline)
- Professional Indemnity insurance — typically \$5M+ for D&C scope
- Whitecard / CSCS for site visits

Recommended (not mandatory)

- RIBA / AIA chartered status if marketing internationally
- Revit / ArchiCAD certification

Daily

- Check RFI inbox in CPM Pro — answer or assign
- Review any shop drawings received yesterday

Weekly

- Sub-consultant coordination meeting (Wed)
- Design progress report to PMs

Monthly

- Design audit on each active project — drawing currency check

Yearly

- Personal CPD: design registration renewal, code update training

5.4 - Contracts Administrator

APPOINTED PERSON — fill in for your company

Employee name: _____

Date appointed: _____ Employment type: _____

Qualifications held: _____

Current tickets / licences (number + expiry):

Signed (employee): _____ Date: _____

Signed (Director): _____ Date: _____

Purpose

Owns the paperwork that protects the company financially. Subcontractor contracts, variations, EOTs, progress claims, retention, security of payment compliance, claims defence.

Reports to

CFO

Responsibilities

- Prepare + issue subcontract for every package > {{e.g. \$20k}}
- Track contract execution — chase signed contracts before subbie mobilises
- Maintain variations register per project — never let a variation sit > 14 days
- Issue EOT notices on PM advice — meet strict {{state SOP Act}} timelines
- Submit progress claims monthly under {{state Security of Payment Act}} format
- Defend payment schedule disputes; engage adjudication if required
- Maintain retention register — release first half at PC, second half at DLP expiry
- Issue defects rectification notices
- Manage performance security (bank guarantees, retention)
- Final account preparation + sign-off

Deliverables

- Signed subcontract per package within 5 days of award
- Variations register (live)
- Monthly progress claim per project

JOB DESCRIPTION

- Final account per project at close

KPIs

- Subcontracts signed before mobilisation: 100%
- Variations approved before work performed: 100%
- Progress claims paid within terms: e 95%
- SOP claims won (or settled favourably): e 80%

Tickets / licences required by law

Mandatory in {{Region}}. Verify currency annually. Confirm regulator-current wording — laws vary by state / country and change over time.

- Whitecard / CSCS for site visits
- Cert IV in Building & Construction (Contract Administration) (CPC40320)

Recommended (not mandatory)

- AIQS / RICS membership
- Adjudicator panel registration for SOP defence work

Daily

- Review variations inbox in CPM Pro
- Chase outstanding signed contracts

Weekly

- Issue all weekly progress claims
- Variations register update per project

Monthly

- Reconcile retention held / released
- Audit subbie compliance vault

Yearly

- Refresh contract templates per latest AS standard updates
- SOP Act training refresh

PART 6

Job descriptions — Site & Field

The people who actually build it. Site Manager, Site Supervisor, Foreman, Tradesman, Site Worker, Apprentice. Heaviest section in this manual — these are the roles with the highest safety exposure and the most day-to-day decisions.

6.1 - Site Manager

APPOINTED PERSON — fill in for your company

Employee name: _____

Date appointed: _____ Employment type: _____

Qualifications held: _____

Current tickets / licences (number + expiry):

Signed (employee): _____ Date: _____

Signed (Director): _____ Date: _____

Purpose

Full-time on site for a single major project. Runs the day-to-day construction, coordinates trades, manages site safety, captures progress in CPM Pro, and reports up to the PM.

Reports to

Project Manager

Responsibilities

- First on site each day, last to lock up
- Run morning toolbox talk — 7 am, every day
- Brief each trade on the day's work + JSA reminders
- Receive deliveries — sign off quantities + condition
- Maintain site diary in CPM Pro — voice-record on the way back to the ute
- Photo log — minimum 10 photos per day of works in progress
- Conduct hourly safety walk + spot-check fall protection, PPE, exclusion zones
- Handle site visitors — induction, sign-in, escort if not familiar
- Issue stop-work order for any unsafe activity — no discussion needed
- Coordinate with PM on tomorrow's schedule + materials

Deliverables

- Daily diary (per CPM Pro template)
- Daily photo log (>= 10 photos)
- Daily toolbox talk record

JOB DESCRIPTION

- Weekly progress photos for client report
- Incident reports within 24 hrs of any near-miss / injury

KPIs

- Days on schedule: matches programme
- Site induction compliance: 100% (no inducted-less workers)
- Diary entries: 1 per work day
- Notifiable WHS incidents: 0
- Subbie performance score (from PM): $\geq 4/5$

Tickets / licences required by law

Mandatory in {{Region}}. Verify currency annually. Confirm regulator-current wording — laws vary by state / country and change over time.

- Whitecard / CSCS — current
- First Aid (HLTAID011) — every 3 years
- CPR (HLTAID009) — every 12 months
- Site Supervisor Certificate / Cert IV Building (CPC40120)
- WHS Officer competency (5-day course) OR Cert IV WHS (BSB41419)
- Asbestos awareness training
- Working at heights ticket (RIIWHWS204) if doing height inspections

Recommended (not mandatory)

- Confined space (RIIWHWS202) if working underground / in tanks
- Forklift licence (TLILIC0003)
- EWP licence > 11m (TLILIC0005)

Daily

- 6:45 am — gate open, sign-in QR poster checked + visible
- 7:00 am — toolbox talk + JSA review (15 min)
- 7:15 am — brief each trade on today's work
- Every hour — safety walk (5 min)
- 12:00 pm — site walkaround with PM (phone)
- 3:00 pm — receive subbie progress reports
- 4:00 pm — site diary entry in CPM Pro (voice ' AI transcribes)
- 4:15 pm — call PM with 5-minute end-of-day debrief
- 4:30 pm — lock site, secure compound, end-of-day photo

JOB DESCRIPTION

Weekly

- Monday 6:30 am — pre-week site walk with PM, review the week's programme
- Tuesday 7 am — weekly site meeting (all trades + design)
- Wednesday — confirm next week's deliveries scheduled
- Friday 3 pm — week's diary summary to PM + photo upload
- Friday 4 pm — toolbox talk debrief + JSA refresh for any new tasks next week

Monthly

- First Monday — programme re-base if any slippage > 5 days
- Safety audit walkthrough with WHS Officer
- Subbie performance scoring in CPM Pro (per subbie)
- Plant inspection — cranes, hoists, scaffolds re-certified

Yearly

- First aid recertification (HLTAID011)
- White Card / CSCS recertification (per jurisdiction)
- Site supervisor training (Cert IV in Building or equivalent)

6.2 - Site Supervisor / Foreman

APPOINTED PERSON — fill in for your company

Employee name: _____

Date appointed: _____ Employment type: _____

Qualifications held: _____

Current tickets / licences (number + expiry):

Signed (employee): _____ Date: _____

Signed (Director): _____ Date: _____

Purpose

Day-to-day delivery on a single trade or zone of a site. Reports to Site Manager. Directs trades, enforces safety at the coalface, signs off completed work.

Reports to

Site Manager

Responsibilities

- Direct trades within assigned zone — quality + speed + sequence
- Enforce PPE + JSA compliance — issue verbal warning then stop-work
- Quality check each trade's work before they leave site
- Defect log entry in CPM Pro for anything needing rework
- Receive trade-level deliveries (small consumables)
- Mentor apprentices on technique + safety
- Step up to Site Manager role when SM is off-site

Deliverables

- Zone progress update to Site Manager daily
- Defect entries in CPM Pro within same shift
- Tradesman performance feedback to Site Manager weekly

KPIs

- First-time-right rate (no rework): $\geq 95\%$
- Apprentice productive hours: $\geq 6/\text{day}$

JOB DESCRIPTION

- Stop-work incidents (good catches): tracked + valued

Tickets / licences required by law

Mandatory in {{Region}}. Verify currency annually. Confirm regulator-current wording — laws vary by state / country and change over time.

- Whitecard / CSCS
- First Aid (HLTAID011)
- Cert III in trade OR Cert IV Building (depending on trade specialism)
- Trade-specific licence if applicable (e.g. electrical, plumbing, gasfitting)

Recommended (not mandatory)

- Working at heights (RIIWHS204)
- Asbestos awareness
- Verbal de-escalation training

Daily

- Attend morning toolbox talk + brief own trade
- Visual inspection of all PPE before work starts
- Inspect each trade's prep before they start cutting
- Sign off completed work at end of shift
- Walk the apprentice through one new technique per day

Weekly

- Toolbox talk lead role rotation
- Stock-take of consumables + raise replenishment PO

Monthly

- First aid response drill (rotate scenarios)
- Trade-specific safety refresher

Yearly

- Trade licence renewal
- First aid + CPR recertification

6.3 - Tradesman (employed) / Subcontractor

APPOINTED PERSON — fill in for your company

Employee name: _____

Date appointed: _____ Employment type: _____

Qualifications held: _____

Current tickets / licences (number + expiry):

Signed (employee): _____ Date: _____

Signed (Director): _____ Date: _____

Purpose

Performs the actual construction work. Plumber, electrician, plasterer, carpenter, painter, tiler. Either directly employed or engaged via subcontract.

Reports to

Site Supervisor (Foreman)

Responsibilities

- Arrive on time, signed in via QR poster
- Complete daily JSA acknowledgement for own trade tasks
- Wear correct PPE for the task at all times
- Perform work to the standard specified in plans, specs + relevant AS standards
- Notify Foreman immediately of any defective material, unsafe condition, or design clash
- Maintain own tools + small plant
- Take responsibility for tidying own work area at end of shift
- Sign off own work at the standard required + accept rework if defective

Deliverables

- Signed JSA each day
- Work to spec, no defects
- Sign-out via QR before leaving site

KPIs

JOB DESCRIPTION

- Sign-in compliance: 100%
- JSA acknowledgement: 100%
- Defects / rework: minimal
- Safety incidents: 0

Tickets / licences required by law

Mandatory in {{Region}}. Verify currency annually. Confirm regulator-current wording — laws vary by state / country and change over time.

- Whitecard / CSCS
- Trade-specific licence (Electrical Worker, Plumbing/Gasfitting, Refrigeration, etc.) — varies by state + trade
- Cert III in trade discipline (or equivalent overseas qualification verified)
- Public Liability insurance if engaged as subcontractor (min \$10M)
- Workers Compensation insurance if employing labour

Recommended (not mandatory)

- Working at heights
- Confined space
- EWP / Forklift / Crane licences as task requires
- Construction Supervisor licence for those signing off own work

Daily

- Sign in via site QR poster
- Attend morning toolbox talk
- Read + acknowledge JSA for today's task
- Wear correct PPE (hi-vis, hard hat, safety boots, plus task-specific)
- Perform work to spec
- Tidy work area at end of shift
- Sign out via QR before leaving

Weekly

- Maintain tools (sharpen blades, check power leads)
- Stock replenishment list to Foreman

Monthly

- Trade-specific safety refresh
- Personal CPD if on apprenticeship pathway

JOB DESCRIPTION

Yearly

- Trade licence renewal (where applicable — electrical, plumbing, gasfitting, etc.)
- White Card / CSCS renewal

6.4 - Site Worker (Labourer)

APPOINTED PERSON — fill in for your company

Employee name: _____

Date appointed: _____ Employment type: _____

Qualifications held: _____

Current tickets / licences (number + expiry):

Signed (employee): _____ Date: _____

Signed (Director): _____ Date: _____

Purpose

General site labour — clean-up, traffic management, materials movement, demolition, simple manual work. Often a stepping stone to apprenticeship or trade certification.

Reports to

Site Supervisor (Foreman)

Responsibilities

- Site cleanliness — waste bins emptied, debris cleared, hazards removed
- Materials movement — wheelbarrow, pallet jack, light forklift if certified
- Traffic management within site — pedestrian / vehicle separation
- Assist trades with set-out, holding, basic cuts under direction
- Demolition under supervision
- End-of-shift site walkaround with Foreman

Deliverables

- Clean site at end of every shift
- Traffic management plan adherence
- Photos of waste-collection bin levels

KPIs

- Site tidy score (visual): $\geq 4/5$
- Safety incidents: 0
- Manual handling injuries: 0

JOB DESCRIPTION

Tickets / licences required by law

Mandatory in {{Region}}. Verify currency annually. Confirm regulator-current wording — laws vary by state / country and change over time.

- Whitecard / CSCS
- First Aid (recommended — HLTAID011)
- Manual handling induction (HLTWHS005 or equivalent in-house training)

Recommended (not mandatory)

- Cert II in Construction Pathways (CPC20220)
- Working at heights
- Forklift / EWP if operating
- Traffic Controller (RIIWHWS205) if doing TC work

Daily

- Sign in via QR poster
- Attend toolbox talk + acknowledge JSA
- Wear PPE
- Receive day's task list from Foreman
- Clean site continuously through the day
- End-of-shift cleanup before sign-out

Weekly

- Skip bin order if full
- Waste segregation audit

Monthly

- Manual handling refresher
- Forklift / EWP refresher if licensed

Yearly

- White Card / CSCS renewal
- First aid (optional but recommended)

6.5 - Apprentice

APPOINTED PERSON — fill in for your company

Employee name: _____

Date appointed: _____ Employment type: _____

Qualifications held: _____

Current tickets / licences (number + expiry):

Signed (employee): _____ Date: _____

Signed (Director): _____ Date: _____

Purpose

On a training pathway to become a qualified tradesperson. Half their hours are productive work, half are about learning. Treat them as the next generation of the company.

Reports to

Foreman (day-to-day) + Apprentice Master (training pathway)

Responsibilities

- Attend TAFE / RTO classes as scheduled
- Complete logbook entries for every task performed on site
- Work under direct supervision until competency signed off
- Ask questions — every day, more than once
- Maintain own tools + add to kit as trade requires
- Respect the trade culture — punctuality, manners, listen first

Deliverables

- Up-to-date apprentice logbook
- TAFE / RTO attendance \geq 90%
- Quarterly performance review

KPIs

- TAFE / RTO grade average: pass+
- Logbook completion: 100%
- Retention through Year 4: target

JOB DESCRIPTION

Tickets / licences required by law

Mandatory in {{Region}}. Verify currency annually. Confirm regulator-current wording — laws vary by state / country and change over time.

- Whitecard / CSCS — first 4 weeks of starting on site
- Signed apprenticeship agreement (Training Contract) with RTO
- Currently enrolled in Cert III (trade discipline)

Recommended (not mandatory)

- First Aid
- Manual handling training

Daily

- Sign in via QR poster
- Attend toolbox talk + JSA
- Wear PPE — never compromise
- Stick with your assigned tradesman
- Logbook entry at end of shift
- Sign out via QR

Weekly

- Review your logbook with your Foreman
- One new technique demonstration + practice

Monthly

- Progress review with Apprentice Master
- TAFE / RTO assessment as scheduled

Yearly

- Annual apprentice review
- Trade-specific certifications as you progress (e.g. licensed electrical worker exam at Year 4)

PART 7

Job descriptions — Support functions

WHS Officer, QA/QC Lead, Office Administrator, Bookkeeper. The four roles that make the construction roles possible. Don't underestimate them — a good admin saves the company more money than most PMs make.

7.1 - WHS Officer

APPOINTED PERSON — fill in for your company

Employee name: _____

Date appointed: _____ Employment type: _____

Qualifications held: _____

Current tickets / licences (number + expiry):

Signed (employee): _____ Date: _____

Signed (Director): _____ Date: _____

Purpose

Owns workplace health and safety across every project. Authors the SWMS, runs inductions, investigates incidents, conducts audits, reports to regulators.

Reports to

Managing Director (independent reporting line per WHS Act)

Responsibilities

- Author + maintain SWMS for every high-risk construction activity (HRCA)
- Run site induction for every new worker (CPM Pro template)
- Investigate every incident (LTI, near-miss, dangerous incident) within 24 hrs
- Conduct monthly safety audit on every active site
- Notifiable incident reporting to {{state regulator}} within statutory deadlines
- Maintain hazardous substance + SDS register
- Maintain emergency response plan + run drills quarterly
- Coordinate first aid + emergency contacts
- Manage workers comp claims with insurer
- Report monthly to Director on safety performance + emerging risks

Deliverables

- SWMS per HRCA
- Monthly safety audit report per site
- Quarterly safety performance report

JOB DESCRIPTION

KPIs

- LTI rate: 0
- Notifiable incidents: 0
- Audit findings closed within 30 days: 100%
- Induction compliance: 100%

Tickets / licences required by law

Mandatory in {{Region}}. Verify currency annually. Confirm regulator-current wording — laws vary by state / country and change over time.

- Whitecard / CSCS
- Cert IV WHS (BSB41419) MINIMUM
- First Aid (HLTAID011) + CPR (HLTAID009)
- Incident investigator training (e.g. ICAM)
- Trained HSR if elected HSR within company

Recommended (not mandatory)

- Diploma WHS (BSB51319)
- Lead Auditor — ISO 45001
- Confined space + working at heights tickets for inspection scope

Daily

- Review yesterday's site diary entries for safety mentions
- Phone WHS Officer of any subbie reporting incident

Weekly

- Walk one site (rotating)
- Review safety dashboard in CPM Pro for new flags

Monthly

- Full audit on each active site
- Toolbox talk topic suggestion to all Site Managers
- Emergency contact register refresh

Yearly

- Annual safety system review (ISO 45001 alignment)
- Regulator briefing — what's changed in the act this year
- Personal HSR / first aid trainer recertification

7.2 - QA/QC Lead

APPOINTED PERSON — fill in for your company

Employee name: _____

Date appointed: _____ Employment type: _____

Qualifications held: _____

Current tickets / licences (number + expiry):

Signed (employee): _____ Date: _____

Signed (Director): _____ Date: _____

Purpose

Owns quality — both during construction (inspection + test plans) and at handover (defects close-out + certification packs).

Reports to

Project Director

Responsibilities

- Author Inspection + Test Plan (ITP) for every project
- Conduct hold-point inspections per ITP — sign or reject
- Coordinate certifier inspections (private certifier or council)
- Manage defect close-out at PC
- Compile handover pack: O&M manuals, as-builts, warranties, certificates
- Maintain non-conformance register
- Drive continuous improvement — common defects ' preventive actions

Deliverables

- ITP per project
- Defect register live in CPM Pro
- Handover pack at PC

KPIs

- Defects at PC: < 15 per project
- Defects closed within DLP: 100%

JOB DESCRIPTION

- Non-conformance recurrence: declining trend

Tickets / licences required by law

Mandatory in {{Region}}. Verify currency annually. Confirm regulator-current wording — laws vary by state / country and change over time.

- Whitecard / CSCS
- Cert IV Building & Construction OR Engineering Associate qualification

Recommended (not mandatory)

- Lead Auditor — ISO 9001
- Building Surveyor / Inspector qualification if signing certifier-style work

Daily

- Review ITP hold points coming up this week
- Visit one site for inspection

Weekly

- Defect register review with each PM

Monthly

- Lessons-learned topic to leadership
- ITP template refresh

Yearly

- ISO 9001 internal audit
- QA training refresh

7.3 - Office Administrator

APPOINTED PERSON — fill in for your company

Employee name: _____

Date appointed: _____ Employment type: _____

Qualifications held: _____

Current tickets / licences (number + expiry):

Signed (employee): _____ Date: _____

Signed (Director): _____ Date: _____

Purpose

Runs the office. Phones, mail, document control, supplier ordering, HR admin, travel bookings, client front-of-house when they visit.

Reports to

CFO

Responsibilities

- Answer phones within 3 rings
- Manage office supplier ordering — stationery, kitchen, IT consumables
- Document control — file every signed contract, certificate, induction in CPM Pro
- HR admin — new starter packs, exit forms, leave tracking
- Maintain the company calendar — site visits, holidays, client meetings
- Coordinate company events — Christmas party, safety days, training
- First impression for visiting clients — coffee, meeting room, professionalism
- Manage company vehicle bookings + service schedule

Deliverables

- Document control register up to date
- Office supplies never depleted
- Travel + visits coordinated without errors

KPIs

- Document filing latency: < 24 hrs

JOB DESCRIPTION

- Phone answer rate: 100% in business hours

Tickets / licences required by law

Mandatory in {{Region}}. Verify currency annually. Confirm regulator-current wording — laws vary by state / country and change over time.

- No statutory tickets — internal training only

Recommended (not mandatory)

- Cert III Business Administration (BSB30120)
- First Aid for office first aid officer designation

Daily

- Phones, mail, document filing
- Coffee + meeting room prep for any visiting client

Weekly

- Office supplies stock check + order
- HR admin batch — leave approvals, new starter docs

Monthly

- Vehicle service schedule check
- Company calendar refresh

Yearly

- Annual leave + sick leave reconciliation
- Christmas party planning (start in October)

7.4 · Bookkeeper

APPOINTED PERSON — fill in for your company

Employee name: _____

Date appointed: _____ Employment type: _____

Qualifications held: _____

Current tickets / licences (number + expiry):

Signed (employee): _____ Date: _____

Signed (Director): _____ Date: _____

Purpose

The day-to-day cash mechanic. Enters bills, raises invoices, processes payroll, reconciles bank, prepares BAS pack for CFO/accountant.

Reports to

CFO

Responsibilities

- Enter every bill received within 48 hrs (Receipts OCR speeds this up)
- Raise every progress claim invoice on time
- Process weekly payroll
- Reconcile bank, credit card, petty cash weekly
- Maintain creditor + debtor ledgers
- Prepare BAS pack for CFO sign-off
- Liaise with external accountant for year-end
- Manage employee superannuation contributions
- Process workers comp + payroll tax returns

Deliverables

- Weekly bank reconciliation
- Monthly P&L draft (handed to CFO by 3rd of month)
- BAS pack quarterly

KPIs

JOB DESCRIPTION

- Bills entered within 48 hrs: 100%
- Bank rec accuracy: 100%
- Payroll errors: 0
- Super on time: 100%

Tickets / licences required by law

Mandatory in {{Region}}. Verify currency annually. Confirm regulator-current wording — laws vary by state / country and change over time.

- Cert IV in Accounting & Bookkeeping (FNS40222) for paid bookkeeping work in AU
- BAS Agent registration (TPB) if preparing BAS for fee
- Xero / MYOB / QuickBooks ProAdvisor (employer preference)

Recommended (not mandatory)

- Diploma of Accounting (FNS50222)
- Member of Institute of Certified Bookkeepers (ICB)

Daily

- Bills + receipts entry from OCR queue
- Match bank transactions to invoices/bills

Weekly

- Payroll processing (Wed)
- Bank reconciliation (Fri)
- Aged debtor chase calls

Monthly

- Month-end close pack to CFO
- Superannuation lodgement

Yearly

- Year-end close pack to external accountant
- Payroll tax annual reconciliation
- STP year-end (Single Touch Payroll, AU)

PART 8

The complete job lifecycle

From a phone enquiry to handing back the keys at the end of the defects liability period. Eight distinct stages, each with its own deliverables, gatekeepers, and references to CPM Pro tools.

8.1 · The eight stages

Every job moves through these eight stages. The boundary between each is a formal gate: nothing moves to the next stage without the previous gate's deliverable being signed off.

1. **Lead** — initial client enquiry, qualified prospect
2. **Estimate** — pricing, costed proposal
3. **Tender / Negotiation** — submission, clarifications, award
4. **Contract** — formal contract execution, deposit, mobilisation prep
5. **Mobilise** — site set-up, programme baselined, kick-off meeting
6. **Build** — construction phase, monthly progress claims, weekly site meetings
7. **Handover (PC)** — defects close-out, practical completion certificate, invoicing
8. **Defects liability period (DLP)** — typically 12 months, retention released, final account

Stage 1: Lead

Gatekeeper: **Estimator** (or Director for \$1M+).

- Phone / email / website enquiry logged in CPM Pro CRM (or contact log if no CRM)
- Qualified within 48 hrs against: project size, sector fit, timeline, budget, location
- "Go / no-go" decision before estimating effort starts
- If go: convert to project in CPM Pro, assign Estimator + Director sponsor

DON'T PRICE TYRE-KICKERS

The biggest single drain on a builder's profitability is estimating jobs that were never going to be awarded. A 1-hour qualification phone call saves a 40-hour estimate. Use it.

Stage 2: Estimate

Gatekeeper: **Director** (sign-off before issue).

- Receive + log tender documents
- Site visit if practical — measure access, parking, existing conditions
- Takeoff quantities (Plans + Takeoff tool in CPM Pro, or BIM IFC import)
- Source subbie + supplier prices (minimum 3 for any package over \$50k)
- Build the estimate in CPM Pro — sections per trade, line items priced from pricebook
- Apply markup + contingency per company policy
- Director sign-off + price seal
- Branded proposal PDF generated + emailed to client

Stage 3: Tender / Negotiation

PART 8 · JOB LIFECYCLE

Gatekeeper: **Director**.

- Submit proposal by deadline
- Respond to clarification questions within 24 hrs
- Attend tender interview if invited
- Negotiate scope/price only with Director approval — never give margin away to win
- Award notification ' letter of intent ' contract preparation

Stage 4: Contract

Gatekeeper: **CFO + Director**.

- Contract drafted (AS 4902 D&C or commercial equivalent)
- CFO reviews payment terms, retention, security, termination clauses
- Director signs
- Deposit invoiced + received before mobilisation
- Insurance certificates lodged with client (PI, PL, contract works, workers comp)
- Performance security arranged (bank guarantee or retention model)

Stage 5: Mobilise

Gatekeeper: **Project Manager**.

- Project Execution Plan (PEP) finalised
- Programme baselined in CPM Pro Gantt
- Subcontractor packages awarded (3-quote process per package)
- Subcontracts signed before any subbie sets foot on site
- Site set-up — fence, sheds, services, sign-in QR poster, first-aid station
- Site Manager appointed + on site
- SWMS prepared + approved for every HRCA
- Pre-start meeting held — all subbies + client present
- First diary entry + first photo logged in CPM Pro

Stage 6: Build

Gatekeeper: **Project Manager + Site Manager**.

- Daily: toolbox talk, site diary, photos, safety walk
- Weekly: site meeting (trades), schedule update, cost-vs-budget review
- Monthly: client review meeting, progress claim, formal report
- Continuously: variations raised + approved before work performed
- Continuously: defects logged + closed within tolerance
- RFI register kept current; design lead responds within 5 business days

Stage 7: Handover (Practical Completion)

Gatekeeper: **QA/QC Lead + Project Manager**.

- Defects walk with client — defects logged in CPM Pro
- All open defects closed before PC certificate issued (or carry tolerable few into DLP)
- Certifier final inspection + occupation certificate

- Handover pack delivered: O&M manuals, as-builts, warranties, certificates
- Practical Completion Certificate signed by client + builder
- Final progress claim invoiced
- First half of retention released
- Keys handed over

Stage 8: Defects Liability Period (DLP)

Gatekeeper: **Project Manager + Contracts Admin.**

- DLP typically 12 months from PC (commercial); 6 years (residential structural under {{state home warranty}})
- Respond to defect notifications within 14 days
- Rectify within timeframe agreed
- At end of DLP: final inspection, second half of retention released
- Final account agreed + signed
- Project closed in CPM Pro — lessons-learned written up + filed

THE LIFECYCLE ISN'T LINEAR

Variations come during build but feed back into estimate stage data (next time you quote a similar job, your pricebook is sharper). DLP defects feed back into QA — what should we do differently on the next job? Treat the lifecycle as a loop, not a line.

PART 9

Estimating procedure

The step-by-step process to produce a winning, profitable estimate. Skip a step and you either lose the job or win it at a loss. Follow it every time — even on jobs that 'feel like' a previous one.

9.1 · The 12 steps

1. **Qualify the lead** — sector, size, timing, budget, client. Go / no-go decision.
2. **Receive + log tender documents** — drawings, specs, scope of works, BOQ, contract terms.
3. **Site visit** — measure access, parking, ground conditions, existing structures, services, hazards.
4. **Takeoff** — quantities measured from plans (CPM Pro Plans + Takeoff) or imported from IFC.
5. **Build the estimate skeleton** — sections per trade in CPM Pro, populated from pricebook.
6. **Source 3 quotes per package** — preferred subbie + 2 backups for anything > \$50k.
7. **Apply company overheads** — site supervision, site sheds, services, fencing, plant hire, insurances.
8. **Add contingency** — typically 3-7% depending on risk profile (see 9.3).
9. **Add markup** — see Part 10 for sector benchmarks.
10. **Director sign-off** — never go out without it.
11. **Generate branded proposal PDF** — cover letter, scope, exclusions, payment schedule, T&Cs.
12. **Submit + log in pipeline** — set follow-up reminder in 7 days.

9.2 · Common takeoff errors that cost you money

- Missing the demolition + make-good lines — always check existing conditions
- Underestimating preliminaries — site sheds, scaffold, hoist, craneage
- Forgetting waste removal — skip bins, dump fees, recycling
- Missing temporary works — propping, hoarding, traffic management, temporary services
- Forgetting commissioning — testing, certification, snagging walks
- Underestimating PM + supervision time on small jobs (it's relatively higher)
- Forgetting the cleanup at PC — pre-handover deep clean is its own line

9.3 · Contingency rules

Risk profile	Contingency %	When to apply
Very low	2-3%	Repeat job for known client, simple fitout, all-new site
Low	3-5%	Standard scope, known site conditions, contemporary build
Medium	5-7%	Refurbishment with unknowns, multi-trade coordination
High	7-10%	Heritage, structural mods to existing, contaminated site
Very high	10-15%	

PART 9 · ESTIMATING PROCEDURE

Specialist scope, design still developing,
tight programme

CONTINGENCY IS NOT PROFIT

Contingency is the client's money set aside for known-unknowns. If it's not spent, some clients will ask to share it. Spell out in the proposal whether contingency is fixed (your money to keep) or shared. Get it in writing.

PART 10

Target margins by sector

What to charge and what to expect to keep. Margins vary wildly by sector, project size, client type, and risk. These are starting benchmarks — your actual numbers come from your own historical project P&Ls (visible in CPM Pro's portfolio dashboard).

10.1 · Benchmark margins (gross, on cost)

Margin = (Contract value – Direct cost) / Contract value. These are the targets; actual margin captured depends on execution. Anything significantly below target on a closed job triggers a lessons-learned debrief.

Sector	Project size	Target margin	Notes
Residential reno	< \$250k	20-25%	High admin/build ratio; client-facing intensity
Residential reno	\$250k-1M	18-22%	Sweet spot for SMB builder
Residential new build	\$500k-2M	15-20%	More predictable; depends on land + design certainty
Commercial fitout	\$100k-500k	15-20%	Speed matters; tenant fitout window typically 4-8 wks
Commercial fitout	\$500k-3M	12-18%	Multi-trade coordination; client = property mgmt
Commercial new build	\$2-10M	10-15%	Lower margin %, higher absolute \$
High-rise concrete	\$10M+	8-12%	Volume game; margin via efficiency not pricing
Civil works	\$1-20M	10-15%	Weather + ground risk; contingency-heavy
Tilt-up industrial	\$2-15M	10-14%	Predictable; programme-driven
Bridges / infrastructure	\$5M+	8-12%	Tender-only; thin margins, long DLPs
Heritage restoration	\$200k-2M	20-30%	Specialist work; pricing premium justified
Design services only	5-15% of build cost	—	Hourly + fixed; track CPD + PI cover

10.2 · Overhead allocation

Overhead = company costs not directly attributable to a project. Director salary, office rent, software licences, vehicles, insurance, accounting fees, marketing. Recover it as a percentage on direct cost. Typical SMB builder: 8-15% of revenue goes to overhead. If your margin target is 18%, your operating margin is 18% – OH%.

NET VS GROSS MARGIN

A 20% gross margin on a \$1M job sounds great until you remember the \$40k of overhead you allocated to it. Your net is closer to 12%. Always look at NET on the P&L — not the gross your estimate sheet shows.

10.3 · When to walk away

- Below target margin minus 5% (e.g. if target is 18% and best price is 12%) — walk unless strategic
- If the contract has open-ended liquidated damages, no cap, no fault-related defence — walk
- If the client demands no retention release until 24 months after PC — walk
- If the client refuses to pay a deposit — walk
- If the design is still 60% complete at tender — walk OR price the risk explicitly

PART 11

Tender response & negotiation

The skill of presenting a quote, answering clarifications, attending interviews, and negotiating without giving the margin away. Negotiation isn't about caving — it's about scope clarity.

11.1 · The art of the proposal

A winning proposal is a clear scope statement plus a credible price plus a story about why us. Drop any one and you lose to the cheapest competitor.

Anatomy of a winning proposal PDF

- **Cover letter** — one page, personal, "thanks for the chance to tender, here's why us"
- **Executive summary** — scope, price, timeframe, what's included, what's not
- **Detailed scope of works** — per trade, line-itemed, measurable
- **Exclusions** — explicit list; what we are NOT pricing
- **Programme** — high-level Gantt or milestone list
- **Payment schedule** — deposit, monthly progress, PC, retention release
- **Team CVs** — who'd actually be on the job
- **Recent project case studies** — 3-4 with photos
- **Insurance + licence certificates**
- **Terms & conditions** — referencing AS 4902 or your equivalent

11.2 · Common negotiation tactics + responses

Client says	What they mean	Recommended response
You're 10% over the cheapest	Test if you'll drop price	Walk through value, scope differences, our exclusions list. Don't drop without scope change.
Can you match X's price?	They prefer you, fishing	Decline politely. Ask what X has excluded that you've included.
We need it by [tight date]	Test commitment + capacity	Confirm programme assumptions. If genuine, premium price for tight timeline.
Lump sum cap on variations	Risk transfer attempt	Refuse. Variations are client-driven scope changes; we can't cap their decisions.
Open-ended LDs	Risk transfer attempt	Cap LDs at 10% of contract value. Never open-ended.
100% retention until 24 months	Cash flow drain attempt	Standard: 5% retention, half released at PC, half at end of DLP. Push back.

PART 12

Contract management

Once awarded, the contract is the bible of the project. AS 4902 D&C is the Australian default; other jurisdictions have equivalents. This part covers variations, EOTs, retention, defects liability, and the security of payment regime.

12.1 · Contract templates by jurisdiction

Region	D&C standard	Lump sum standard
Australia	AS 4902-2000	AS 2124-1992 / AS 4000-1997
New Zealand	NZS 3910:2013 (D&B option)	NZS 3910:2013
Ireland	RIAI / GCCC / JCT-Ireland	RIAI
France	Contrat de promotion immobilière / EPCM	Marché à forfait
United States	ConsensusDocs 410 / AIA A141	AIA A101
Canada	CCDC 14 (D-B)	CCDC 2

12.2 · Variations workflow

1. Client (or designer / consultant) requests change.
2. Estimator prices change (cost + time impact).
3. PM submits variation request to client in writing via CPM Pro.
4. Client approves in writing (signed, dated).
5. Variation added to contract value. Work performed.
6. Variation invoiced separately from main progress claim (or rolled in).

NEVER START VARIATION WORK BEFORE WRITTEN APPROVAL

If you do the work to keep the client happy, you'll find it impossible to collect. Always written approval first. Always.

12.3 · Extension of Time (EOT)

- Trigger event must be a Qualifying Cause of Delay under your contract
- Notify client within strict timeline (typically 7-14 days of becoming aware)
- Full claim submitted within 28 days
- EOT extends date for PC + protects against liquidated damages
- If approved, baseline programme re-issued

12.4 · Security of Payment Act (AU jurisdictions)

Every state has a SOPA. Common features: progress claims must include a statement saying it's a claim under the Act; payment schedules must respond within strict timeframes; adjudication mechanism if disputed.

- NSW: Building and Construction Industry Security of Payment Act 1999

PART 12 · CONTRACT MANAGEMENT

- VIC: Building and Construction Industry Security of Payment Act 2002
- QLD: Building Industry Fairness (Security of Payment) Act 2017
- WA: Construction Contracts Act 2004
- SA: Building and Construction Industry Security of Payment Act 2009
- TAS: Building and Construction Industry Security of Payment Act 2009
- ACT: Building and Construction Industry (Security of Payment) Act 2009
- NT: Construction Contracts (Security of Payments) Act 2004

PART 13

Site set-up & mobilisation

Day 1 on site looks the same every time: fence, sheds, services, signage, sign-in kiosk, first aid, exclusion zones. Get this right and you're set up for success. Skip a step and you'll pay later.

13.1 · Day 1 set-up checklist

Site mobilisation — day 1

- Site fence installed (1.8m chainwire min) with locked gate
- Crash barriers + Type 5 hoarding to street if footpath impacted
- Site sign installed: company name, licence, contact, project description, after-hours phone
- Site shed installed + powered (donga, demountable, or hired)
- Power connection — temporary supply request lodged with utility, ELCB-protected
- Water connection — standpipe or temp meter
- Toilet facilities — chemical or sewer-connected (count: 1 per 15 workers)
- First aid kit + AED installed in site shed, contents checked + dated
- Fire extinguishers x 2 minimum (water + dry chemical), 6-month inspection sticker visible
- Site QR sign-in poster mounted at gate (CPM Pro)
- Site rules poster mounted (CPM Pro safety library)
- Emergency assembly point signposted
- Spill kit if working with hazardous substances
- Material laydown area marked + segregated from working areas
- Vehicle / pedestrian separation marked
- Lighting installed if working outside daylight hours
- CCTV / site cam set up if used (notify staff)
- Skip bin booked + delivered before week 1 closes
- Council acoustic monitoring set up if required by permit
- Neighbour notification letter delivered (24 hrs before any noise)

PART 14

Site rules & induction

Every worker — employee, subbie, visitor — goes through site induction before they touch a tool. This part contains the standard induction document, sign-in sheet, JSA template, and site rules poster. All available in CPM Pro Safety library.

14.1 · The 10 universal site rules

(Customise. These are starter rules. Post a printed copy at the gate, the shed, and the toilet.)

1. **Sign in at the gate, every time.** If your name isn't on today's sheet, you're not on site.
2. **PPE before you cross the line.** Hi-vis shirt, hard hat, steel-cap boots. Eye + ear protection task-dependent.
3. **No alcohol, no drugs, no exceptions.** Random testing in place.
4. **No phones on machinery, scaffolds, or while operating tools.** Eyes on the work.
5. **Fall protection at any height over 2 metres.** Harness, edge protection, scaffold — never "just for a minute".
6. **Hot work permit before any cutting, grinding, welding.** Fire blanket + extinguisher within reach.
7. **Lock-out / tag-out before working on energised systems.** Electrical, mechanical, pneumatic.
8. **Clean as you go.** Trip hazards are the #1 cause of LTIs on Australian sites.
9. **Report every near-miss.** No blame. Better to catch it now than after an injury.
10. **If in doubt, ask.** Stop work, call the Foreman or Site Manager. Always cheaper than a hospital bill.

14.2 · The induction document — required content

- Project name, address, builder name, builder licence, project value, scheduled PC date
- Site Manager name + mobile
- First aid officer name + mobile
- Emergency procedures: fire, medical, evacuation, assembly point, address for ambulance
- Universal site rules (above)
- Task-specific hazards on this project
- PPE requirements
- JSA acknowledgement
- Worker's signature + date
- Site Manager's signature confirming induction delivered

PART 15

Safety regulations by country

The act, the regulator, the citation, the key obligations. Each region's pillar legislation in one page. Useful when working across jurisdictions or onboarding staff who've moved from another country.

Australia

Primary act

Work Health and Safety Act 2011 (national model, adopted by NSW, QLD, ACT, NT, SA, TAS, Cth. VIC = OHS Act 2004. WA = WHS Act 2020).

Regulator

SafeWork NSW / WorkSafe VIC / Workplace Health and Safety Queensland / WorkSafe WA / SafeWork SA / WorkSafe Tasmania / WorkSafe ACT / NT WorkSafe / Comcare (national).

Key duties

- Primary duty of care under s.19: PCBU must ensure health + safety of workers, so far as reasonably practicable
- Officer due diligence under s.27: directors must actively oversee, not just delegate
- Notifiable incidents under s.38: death, serious injury/illness, dangerous incident must be reported immediately to the regulator
- Consultation: with workers + WHS rep + other duty-holders
- WHS management system: SWMS for high-risk construction work, induction, first aid, emergency plan

Key documents / cards

- SafeWork Australia — Model Code of Practice: Construction Work
- Whitecard (CPCCWHS1001) mandatory before entry

Penalties

Category 1 (reckless): individual up to \$600k + 5 yrs jail; body corporate up to \$3M. Category 2: up to \$300k/\$1.5M. Category 3: up to \$100k/\$500k.

VERIFY CURRENCY

Safety law is updated frequently. Verify the latest position with the regulator before relying on this summary for tender, contract, or audit purposes.

New Zealand

Primary act

Health and Safety at Work Act 2015 (HSWA).

Regulator

WorkSafe New Zealand.

Key duties

- PCBU primary duty (similar to AU)
- Officer due diligence
- Notifiable events: deaths, serious injuries, illness, dangerous incidents
- Worker engagement, participation, representation

Key documents / cards

- WorkSafe Construction Sector Plan
- Site Safe NZ Passport mandatory in many sites

Penalties

Tier 1 (reckless): NZ\$600k/\$3M. Tier 2: \$300k/\$1.5M. Tier 3: \$100k/\$500k.

VERIFY CURRENCY

Safety law is updated frequently. Verify the latest position with the regulator before relying on this summary for tender, contract, or audit purposes.

Ireland

Primary act

Safety, Health and Welfare at Work Act 2005, plus Safety, Health and Welfare at Work (Construction) Regulations 2013.

Regulator

Health and Safety Authority (HSA).

Key duties

- Section 8 duty: employer must ensure, so far as reasonably practicable, the safety, health and welfare of employees
- Construction Regs 2013: PSCS (Project Supervisor Construction Stage) appointment mandatory; SafePass card for every worker; CSCS (Construction Skills Certification Scheme) for skilled tasks
- Site notification to HSA if duration > 30 days or > 500 person-days
- Safety Statement + Site-Specific Safety Plan required

Key documents / cards

- HSA Code of Practice for the Construction Sector
- SafePass + CSCS card mandatory

Penalties

Summary: €5,000 + 12 months prison. Indictable: €3M + 2 years prison.

VERIFY CURRENCY

Safety law is updated frequently. Verify the latest position with the regulator before relying on this summary for tender, contract, or audit purposes.

France

Primary act

Code du travail (Quatrième partie : Santé et sécurité au travail) + Décrets 92-158 + 94-1159 (construction).

Regulator

Inspection du Travail + OPPBTP (Organisme Professionnel de Prévention du Bâtiment et des Travaux Publics).

Key duties

- Document Unique d'Évaluation des Risques (DUER) — mandatory written risk assessment for every employer
- CSPS appointment (Coordonnateur SPS — Sécurité et Protection de la Santé) for projects with multiple employers
- PGC (Plan Général de Coordination) prepared by CSPS
- Carte BTP (BTP card) issued by CIBTP, mandatory for every worker on a construction site since 2016
- Déclaration préalable to Inspection du Travail before site start

Key documents / cards

- OPPBTP guides
- Carte BTP mandatory

Penalties

Up to €75,000 + 5 years prison (death case). Civil and criminal liability for company officers.

VERIFY CURRENCY

Safety law is updated frequently. Verify the latest position with the regulator before relying on this summary for tender, contract, or audit purposes.

United States (federal)

Primary act

Occupational Safety and Health Act 1970 (OSH Act). 29 CFR 1926 = Construction Industry Standards.

Regulator

Occupational Safety and Health Administration (OSHA), federal. Many states have OSHA-approved State Plans (Cal/OSHA, WashingtonOSHA, etc.) with stricter rules.

Key duties

- General Duty Clause (Section 5(a)(1)): provide workplace free from recognised hazards
- 1926 Subpart C — General Safety + Health Provisions
- 1926 Subpart E — PPE
- 1926 Subpart M — Fall Protection (6 ft / 1.8m trigger)
- 1926 Subpart P — Excavations
- OSHA 10-hr or 30-hr training mandatory in many states (NY, CT, NV)
- OSHA 300 log: record + report serious injuries; submit annually for sites > 250 workers

Key documents / cards

- 29 CFR 1926
- OSHA 10/30 cards mandatory in many states
- Cal/OSHA Title 8 if California

Penalties

Serious violation: up to \$16,131 per. Willful or repeated: up to \$161,323 per. Willfull resulting in death: criminal — up to 6 months prison + \$250k individual / \$500k corp.

VERIFY CURRENCY

Safety law is updated frequently. Verify the latest position with the regulator before relying on this summary for tender, contract, or audit purposes.

Canada

Primary act

Federal: Canada Labour Code Part II. Provincial primacy: each province has its own OHS Act (e.g. Ontario OHSA, BC Workers Compensation Act + OHS Regulation, Quebec Loi sur la santé et la sécurité du travail).

Regulator

Canadian Centre for Occupational Health and Safety (CCOHS) + provincial regulators (Ontario MLITSD, WorkSafeBC, CNESST Quebec, Alberta OHS, etc.).

Key duties

- Internal Responsibility System (IRS) — everyone has shared responsibility for safety
- Joint Health and Safety Committee (JHSC) required for workplaces > 20 workers
- Notice of Project filing before construction commences (most provinces)
- Construction Safety Officer (CSO) or equivalent on larger projects
- Working at Heights (WAH) training mandatory in Ontario for any work > 3 m

Key documents / cards

- Provincial OHS Construction Regulations (e.g. O. Reg 213/91 Ontario)
- Provincial WCB / WorkSafe registration

Penalties

Ontario: up to \$1.5M corporate, \$100k individual + 12 months prison. BC: up to \$722k corporate. Quebec: up to \$300k corporate.

VERIFY CURRENCY

Safety law is updated frequently. Verify the latest position with the regulator before relying on this summary for tender, contract, or audit purposes.

PART 16

Safety regulations by industry

Each industry has its own high-risk activities and specialist regulations. The acts in Part 15 apply broadly; this part drills into the industry-specific obligations.

16.1 · Commercial fitout

- **Asbestos register** — required before any cutting / drilling into pre-2003 building fabric (AU)
- **Hot work permit** — every cut, weld, grind in occupied building
- **Tenant coordination** — work outside operating hours, noise notification, vertical transport separation
- **Fire system isolation permits** — written authorisation from base building before isolating sprinklers / detection
- **Lift / hoist use** — base building approval, qualified operator, weight limits

16.2 · Residential new build

- **Home Warranty Insurance** — mandatory before contract in AU (varies: HBCF NSW, BSA QLD, VMIA VIC, etc.)
- **Termite barrier certification** — slab edge, pipe penetrations
- **BAL (Bushfire Attack Level) compliance** — designated bushfire-prone areas
- **Waterproofing inspection** — wet area + balcony — hold point
- **Trade licences** — electrical, plumbing, gasfitting all license-restricted

16.3 · High-rise concrete

- **Crane permits** — every crane requires per-state permit, qualified operator, lift plans for non-standard lifts
- **Tower crane safety** — daily inspection, monthly major inspection
- **Concrete pour permits** — pump operator, slump test, cube tests, pour temperature
- **Edge protection** — perimeter screens (e.g. RMD perimeter system), tied off before any work at exposed edge
- **Loaded scaffold deflection check** — weekly
- **Concrete delivery management** — pour windows, traffic management, wash-out areas

16.4 · Civil works + earthworks

- **Dial Before You Dig** — every excavation, every time (AU: 1100. US: 811)
- **Excavation safety** — shoring required for trenches over 1.5m depth, slope stability assessment
- **Confined space** — gas test, rescue plan, permits for sumps + pits
- **Traffic management plan** — qualified TMP designer, RMS / TMR approval
- **Environmental management plan** — erosion + sediment, dust, noise, fauna protection
- **Geotechnical reports** — ground conditions verified before bulk earthworks

16.5 · Bridges + tunnels

- **Specialist temporary works engineer** — every formwork + propping system signed off
- **Confined space + ventilation** — tunnels mandatory, fresh air monitoring
- **Crane lift studies** — every major precast bridge beam lift
- **Working over water** — life vests, rescue boats, person-in-water plans
- **Rail / road over-watch** — track / road occupation permits, possession agreements

16.6 · Electrical infrastructure

- **Permits to work** — every isolation, every test, every switch
- **LV + HV qualification** — operator credentials evidenced before any work
- **Test before touch** — every cable, every time
- **Access permits** — substations, switching stations — utility coordination

PART 17

Quality management

ITPs, hold points, defect close-out, handover certification. The aim: hand back keys with zero defects, every time. The reality: minimise defects, close them fast, and never let a complaint reach the regulator.

17.1 · Inspection + Test Plan (ITP)

An ITP lists every quality-critical activity on the project, who inspects, what evidence is captured, and whether it's a hold point (work cannot proceed until signed off) or witness point (inspector notified but work can continue).

Stage	Activity	Hold/Witness	Evidence
Earthworks	Bulk excavation	Witness	Geotech report + photos
Earthworks	Compaction test	Hold	Lab report
Structure	Reinforcement before pour	Hold	Engineer sign-off
Structure	Concrete pour	Witness	Slump + cube tests
Structure	Form strip	Hold	Engineer sign-off
Envelope	Waterproofing	Hold	Applicator certificate + photo
Envelope	Window install	Witness	Photo + flashing inspection
Services	Plumbing pressure test	Hold	Pressure test record
Services	Electrical insulation test	Hold	Megger test record
Finishes	Tiling complete	Witness	Defect-free photo
Handover	Cleaning final	Hold	Pre-handover walk photos

PART 18

Environmental management

Erosion + sediment, waste, noise, dust, neighbour management. EPA regulators take complaints seriously. A neighbour calling your local council costs you days of work and reputation.

18.1 · The neighbour-management checklist

Before site start

- Door-knock all adjacent properties; explain scope + duration + working hours
- Letter drop entire street with project info + after-hours contact
- Install site sign with same info + builder name + project description
- Confirm permitted hours with council; never work outside without approval
- Plan vehicle / parking strategy that doesn't block neighbour driveways

During build

- Damp down dust at start + end of day
- Sweep street outside site every Friday minimum
- No trucks idling outside neighbours' bedrooms
- Skip bin not blocking footpath without council permit
- Hold-points if any noise complaint received — pause + investigate
- Acoustic + vibration monitoring continuously if permit-required
- Tree / vegetation protection zone respected

PART 19

Delivery process by industry

The sequence of work changes per industry. A residential reno follows a different path to a tilt-up warehouse. This part walks through the typical sequence for each sector with the key milestones and decision points.

19.1 - Commercial fitout (typical 4-12 weeks)

- W1: Demo + make-good of existing fabric
- W1-2: Services rough-in (electrical, data, HVAC, plumbing)
- W2-3: Partitions + ceiling grid
- W3-4: Services fit-off + first-fix joinery
- W4-5: Finishes (paint, carpet, vinyl, tiles)
- W5-6: Furniture install + signage
- W6: Commissioning + cleaning + handover

19.2 - Residential reno (typical 8-24 weeks)

- W1-2: Demolition + waste removal
- W2-3: Structural mods + framing
- W3-4: Services rough-in
- W4-5: Insulation + plasterboard
- W5-6: Joinery install + tiling
- W7-9: Waterproofing + bathroom / kitchen fitout
- W10-12: Painting + flooring + handover

19.3 - Residential new build (typical 24-52 weeks)

- Pre-start: site survey, soil test, slab design
- W1-3: Site clearing + excavation + footings
- W3-6: Slab + waterproofing
- W6-12: Frame + roof + windows
- W12-16: Brickwork / cladding + insulation
- W16-22: First fix services + plasterboard
- W22-28: Second fix services + joinery + tiling
- W28-32: Painting + flooring + landscaping
- W32: Final inspection + PC + occupation certificate

19.4 - Tilt-up industrial warehouse (typical 16-32 weeks)

- W1-4: Bulk earthworks + drainage
- W4-6: Slab on ground + casting bed prep
- W6-10: Panel casting (on slab)
- W10-12: Tilt + crane lift + brace
- W12-16: Roof structure + cladding

PART 19 - DELIVERY BY INDUSTRY

- W16-20: Services + concrete polishing
- W20-24: Office fitout + dock equipment
- W24-28: Hardstand + landscaping + signage
- W28: Commissioning + PC

PART 20

Payment terms & cash management

The single biggest predictor of a builder going bust is cash flow, not profitability. This part is the playbook for managing money in and money out — clients, subbies, employees, suppliers, retention.

20.1 - Payment terms with suppliers

- **Standard:** Net 30 days from end of month (EOM) — first time you buy from a supplier
- **Established:** Net 30 days from invoice date — after 6 months trading
- **Cash on delivery (COD):** some specialty items + new suppliers
- **Early-pay discount:** negotiate 2% / 10 net 30 where you can
- **Retention?** Generally no retention on supplier invoices (their warranty is the protection)

20.2 - Payment terms with subcontractors

- **Progress claims:** monthly, by 15th of month, paid within 21 days unless contract longer
- **Retention:** 5% of total contract value held — half released at PC, half at end of DLP
- **Statement of subcontractor compliance:** with every claim (super, workers comp, tax)
- **Final payment:** held until defects close-out + handover docs received
- **Bonus pool (optional):** 1-2% of contract reserved as bonus for early + defect-free completion

20.3 - Payment terms with employees

- **Salary:** fortnightly or monthly (fortnightly more common; cash flow smoother for employee)
- **Hourly:** weekly, processed Wednesday for Thursday pay
- **Superannuation:** quarterly minimum (AU: SG, 11.5% as of 2026); pay monthly to reduce admin
- **Annual leave:** accrued + paid out on termination; 4 weeks (full-time AU)
- **Sick leave:** 10 days/year personal/carer (AU full-time)
- **Long service leave:** 8.67 weeks after 10 years (NSW; varies per state)

20.4 - Client payment terms

- **Deposit:** 10% on contract execution, before mobilisation
- **Progress claims:** monthly, paid 14-21 days from claim date (SOPA regulated in AU)
- **Retention:** 5% (small jobs) up to 10% (large) — client holds against builder
- **Final payment:** 50% of retention at PC + final account; 50% at end of DLP
- **Late payment:** interest charged at RBA cash rate + 4% on overdue amounts (per contract)

PART 21

Employment terms & employee rights

The legal framework for hiring + employing + terminating staff. Heavily regulated in every jurisdiction. Get it wrong and Fair Work or the equivalent regulator will be at your door.

21.1 · Hiring

- Written contract before start date — never verbal
- Job description matches the role (see Parts 4-7)
- Probationary period: 3 or 6 months (AU)
- Working with children check / National Police check for client-facing roles
- Tax File Number declaration + super choice form
- Workers compensation registration (insurer policy listing employee)

21.2 · Awards + pay rates (AU)

- **Building and Construction General On-site Award** — covers most trades
- **Clerks — Private Sector Award** — office admin, bookkeeper
- **Manufacturing & Associated Industries Award** — joinery, fabrication
- Annual award rate increase: 1 July (or as Fair Work Commission orders)
- Apprentice rates: percentage of base, increases per year

21.3 · Termination

- Notice period per contract or NES minimum (1-5 weeks based on service)
- Redundancy pay per service: 4-16 weeks (NES, AU)
- Final pay: all accrued annual leave + LSL + outstanding wages
- Termination letter — written, dated, signed
- Termination meeting: never one-on-one, witness from HR or another senior
- Unfair dismissal protection: 6 months service (small business: 12 months)

PART 22

Marketing & business development

How to win the next job. Brand, lead generation, sales pipeline, client retention. A consistent 35% win rate beats a sporadic 60% — predictability of pipeline is everything.

22.1 · The marketing channels that work for D&C

- **Word of mouth + referrals** — 40-60% of pipeline for most successful SMB builders. Cultivate it.
- **Client retention** — repeat clients are 5x cheaper to win than new ones
- **Architects + designers** — referrals + tender invitations; lunch them quarterly
- **Property managers + agents** — commercial fitout pipeline; relationships matter
- **Industry bodies** — HIA, MBA, Property Council; visibility + networking
- **LinkedIn** — case studies, before/after photos, project announcements
- **Awards submissions** — HIA / MBA / regional awards = future tender credibility
- **Google Business Profile + reviews** — local SEO matters more than you think

22.2 · Annual marketing rhythm

- **Monthly:** 1 case study post (web + LinkedIn), 1 client check-in call per repeat client
- **Quarterly:** Designer / architect lunches x 4-6; industry event attendance
- **Half-yearly:** Newsletter to entire database; awards submission window
- **Yearly:** Brand refresh review; pricing benchmarking; major client thank-you event

22.3 · Sales pipeline KPI

Healthy SMB builder pipeline:

- Leads in pipeline e 4x projected revenue (e.g. \$20M pipeline for \$5M annual revenue)
- Quote acceptance rate e 35%
- Average deal cycle: lead ' award typically 8-16 weeks
- Repeat client revenue e 40% (sign of healthy delivery)
- Designer / architect referrals e 25% of new leads

PART 23

Meeting protocols & agendas

Every recurring meeting in a D&C company has a fixed agenda, a fixed cadence, and a minute-taker. This part lays out the templates so no meeting is run on improvisation.

23.1 · Pre-start meeting

Held week of mobilisation, before any worker arrives on site. Attendees: PM, Site Manager, all subbies awarded a package, design lead, client representative.

Pre-start agenda

- Project overview — scope, programme, key constraints
- Site set-up status + access details
- Safety briefing — site rules, induction process, JSA expectations, emergency plan
- Communication channels — who calls who for what
- Programme walkthrough — sequence, hold points, milestone dates
- Subbie introductions + scope of works per package
- Variations + RFI process
- Progress claim cycle
- Quality expectations — ITP review
- Site rules — sign-in, PPE, hours, parking, waste
- Open Q&A
- Action register + responsible parties

23.2 · Weekly site meeting

Every Tuesday 7 am, 60 minutes max. Attendees: Site Manager (chair), PM, lead trades + any subbie whose week's work is critical.

Weekly site agenda

- Safety roll-call: incidents, near-misses, JSA changes this week
- Programme: what was achieved last week vs plan
- This week's work + sequence
- Resource conflicts (deliveries, lifts, crane hours)
- RFIs outstanding + response status
- Variations raised + status
- Defects + non-conformances
- Materials + deliveries inbound
- Subbie attendance forecast
- Action register update

23.3 · Monthly client review

PART 23 · MEETING PROTOCOLS

End of each month or aligned to progress claim cycle. PM chairs. Attendees: client, design lead (if active), PM, Site Manager (optional).

Monthly client agenda

- Programme status + look-ahead
- Cost report — committed vs budget
- Variations raised + approved + outstanding
- Safety performance
- Quality + defects status
- RFI register
- Client decisions required (selections, etc.)
- Progress claim discussion
- Photos + look-ahead
- Action register

PART 24

CPM Pro tool reference

Which app feature does what task — sequenced through the lifecycle. This is the bridge between the processes in this manual and the system that executes them.

24.1 · By lifecycle stage

Stage	Activity	CPM Pro tool
Lead	Capture enquiry	Clients section + project tile
Estimate	Quantify from plans	Plans & Takeoff
Estimate	Import BIM model	Integrations ' Revit / IFC
Estimate	Build estimate	Project ' Estimates
Estimate	AI auto-draft	AI estimator (BYO key or AI Pack)
Tender	Branded proposal PDF	Estimates ' Proposal
Tender	Track quote acceptance	Estimates dashboard + read-receipts
Contract	Generate contract PDF / DOCX	Contracts library
Mobilise	Project execution plan	Project Setup wizard
Mobilise	Subcontracts	Suppliers + Contracts
Mobilise	Site QR sign-in poster	Safety ' QR posters
Build	Daily diary (voice)	Project floating diary button
Build	Site photos	Project ' Photos
Build	Schedule + critical path	Gantt
Build	Safety library (SWMS etc.)	Safety library
Build	Variations	Variations register
Build	RFIs	RFIs
Build	Progress claims	Invoices
Build	Bills + supplier pay	Accounting ' Bills
Build	Site induction + JSA	Tokenised QR site sign-in
Build	Defects with iPad markup	Defects
Build	Send Gantt to subbies	Gantt ' email subbies
Handover	Defect close-out	Defects ' close-out token
Handover	Handover pack	Project documents hub

PART 24 - CPM PRO TOOL REFERENCE

Handover	3D walkthrough share	Walkthrough public link
DLP	Retention release tracker	Variations / Accounting
DLP	Final account	Accounting ' Project P&L
Continuous	Xero sync	Integrations ' Xero
Continuous	Team management	Team & access
Continuous	Phone invites	Team ' invite by phone

PART A

Appendices — Forms & templates

Copy-paste-ready forms referenced throughout this manual. Customise the company-specific fields, then print and use.

A1 · Induction sign-in template

Available live in CPM Pro Safety library. Printable PDF auto-generates per project.

A2 · JSA template

Available live in CPM Pro Safety library. Customise per high-risk task. Sign + date before work commences.

A3 · Pre-start meeting agenda

See Part 23.1 — copy as is.

A4 · Weekly site meeting agenda

See Part 23.2 — copy as is.

A5 · Monthly client review agenda

See Part 23.3 — copy as is.

A6 · Variation request template

Auto-generated by CPM Pro Variations. Print, sign, file.

A7 · EOT claim template

Must reference contract clause + Qualifying Cause + date of awareness + revised completion date.

A8 · Progress claim cover letter

Must state: "This is a payment claim made pursuant to {{state SOPA Act}}." (mandatory wording in AU).

A9 · Defect rectification notice

Issued to subbie. Cites defect, location, rectification deadline, consequence of non-action.

A10 · Worker acknowledgement of IMS

One-page signed acknowledgement that worker has received + read their role's IMS extract. Filed in personnel record.