

# Client Processes Playbook





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#### About Us:

Outsource Access is a comprehensive "business process outsourcing" and virtual assistant firm with over 500 employees in the Philippines serving businesses in 70 industries. But what are we really? Our Clients tell us we are their "Growth Partner" helping them redefine how they scale. We are proud to have won 6 national and global awards for our commitment to quality and impacting the lives of our staff including recent ranking of #326 on the Inc 5000 for 2023.

We do a customized discovery session with each Client and offer support in every business function including operations, marketing, bookkeeping, sales, HR, admin and executive support. Our staff are all full time and managed employees who are committed to your success with our signature talent and matching, onboarding and detailed OA Playbook process to capture and document every task we execute. We will be your full turn-key, affordable answer to scale and growth.

Want to Take Next Steps? Scan the QR code and see a short video tour of our company and process with links to book a complimentary discovery call at: OutsourceAccess.com/process









#### Task |Updating Prospective Engineering Client Info in the CRM

**Description of the Task**: Updating the CRM system with accurate and current details on prospective clients, including contact information, project interests, and business needs. Keeping the client database up to date ensures that the sales and business development teams have relevant information at their fingertips, which is crucial for targeted outreach, relationship building, and project acquisition in the competitive engineering market.

1. Access the company's CRM platform using your login credentials to securely enter client data.

2. Locate the section or list dedicated to prospective engineering clients or leads. Ensure you're in the correct area of the CRM to avoid overwriting any existing client data.

3. Use the search bar to look up the specific client by name, company, or any identifying information. Confirm that you're updating the correct profile to maintain data integrity.

4. Scan the client's current details, such as contact information, industry sector, project interests, and previous interactions. This helps prevent duplicate or conflicting information and ensures the update is accurate.

5. Enter any new information received, such as updated contact numbers, email addresses, or new points of contact. Ensure that titles and roles reflect their position in the client's organization, such as Project Manager, Procurement Specialist, or Facilities Engineer.

6. Document specific project interests or engineering needs shared by the client, such as infrastructure development, environmental consulting, or structural analysis. This information supports targeted follow-ups and aligns with the firm's service offerings. 7. Log any recent communications or meeting notes, highlighting key client concerns or upcoming projects. Detailed notes ensure that the team is well-informed and ready for timely follow-ups or proposals.

8. Adjust the client's stage in the CRM pipeline, marking them as a new lead, a warm prospect, or moving toward proposal submission. This keeps the firm's sales team aligned on where each prospect stands.

9. Upload any files such as RFPs, project specifications, or introductory materials provided by the client. These documents can be referenced quickly in future client interactions or proposal meetings.

10. Double-check all entries for accuracy, then save the updated client record in the CRM. This step ensures that all data is correctly stored and accessible to the team.

11. Send a brief update to team members, like the project engineer or business development manager, about the client's new status or updated information to facilitate coordinated efforts.

12. Schedule a follow-up task or reminder within the CRM to reconnect with the client as appropriate, whether it's to check on project readiness, provide additional details, or offer a proposal.

## Task |Following Up on Engineering Project Proposals and Bid Submissions

**Description of the Task:** Following up on submitted proposals and bids is key to ensuring ongoing communication with potential clients. This task involves tracking proposal deadlines, maintaining contact with clients, and confirming receipt of submission materials. Timely follow-up on engineering project bids can make the difference in winning contracts and building trust with prospective clients, keeping your firm top-of-mind during their decision-making process.

1. Log into the project management or CRM system used by the firm to track proposals and bids. Locate the list or dashboard that tracks current proposals, pending bids, and their statuses.

2. Review recent submissions and identify proposals or bids that are awaiting client responses. Focus on high-priority projects, such as infrastructure, environmental compliance, or civil engineering bids, and confirm key submission details.

3. Collect relevant details for each proposal, such as submission dates, project scope, estimated costs, and timelines. Ensure this information is up-to-date for a smooth follow-up with clients or project owners.

4. Check that you have accurate contact information for each client representative or project manager linked to the bid. This includes names, titles, and preferred methods of contact, whether it's email or phone.

5. Write tailored follow-up emails for each proposal, emphasizing the firm's eagerness to discuss the bid and any questions they may have. Use industry language to reaffirm the firm's understanding of their technical needs and commitment to project success. 6. Summarize key aspects of the proposal in the follow-up message, such as innovative design elements, compliance with local engineering regulations, or unique project deliverables. This reminds the client of the proposal's value and aligns with the project's objectives.

7. Schedule reminders for follow-up actions in the CRM or calendar tool. Set specific intervals (e.g., one week after initial follow-up) to maintain contact without overwhelming the client.

8. Record each follow-up attempt in the CRM, including the date, method, and any client feedback or questions. Consistent logging ensures the project and sales teams are up-to-date on all interactions.

9. Keep an eye on email or phone notifications for responses to your follow-up efforts. A prompt reply to any client inquiries can reinforce the firm's professionalism and dedication to the project.

10. Update the status of each proposal or bid in the tracking system based on the client's feedback. If they request additional information, assign this task to the appropriate team members and document it in the CRM.

11. If the client has technical questions or requests adjustments, reach out to relevant engineers or project managers to prepare responses or proposal revisions. Clear communication ensures accurate and timely information is provided.

12. Once the follow-up is complete, send a confirmation email summarizing any decisions made, next steps, or additional documentation requested by the client.

13. Archive completed follow-ups for won or lost bids, or prioritize proposals that require further attention in the CRM. Keeping organized records helps the firm stay prepared for upcoming projects or client feedback.

## Task |Researching New Business Opportunities

**Description of the Task**: Identifying and evaluating potential business opportunities that align with the firm's engineering specialties. It includes researching industry trends, market needs, and identifying potential clients or projects that require the firm's expertise. Proactively finding new business avenues helps the firm stay ahead of competitors, expand its client base, and secure high-value engineering contracts.

1. Meet with the project manager or business development lead to understand the specific areas of interest, such as civil infrastructure projects, environmental assessments, or renewable energy developments. Clarify the target industries, geographic locations, and project scales that align with the firm's growth goals.

2. List reputable sources for engineering project leads, such as government websites, industry publications, engineering association bulletins, and online platforms like Dodge Data & Analytics or BidClerk. Set up alerts where possible to receive real-time updates on relevant projects.

3. Regularly check portals like FedBizOpps (FBO) for federal projects or local government sites for regional RFPs related to infrastructure, utility upgrades, or public safety improvements. Search industry-specific sites for commercial opportunities, like new developments or expansions in energy or water management.

4. Research potential clients within the private sector, such as developers, construction companies, or technology firms. Look for companies with recent funding rounds, expansions, or project announcements in related sectors, as they may require engineering services soon. 5. Stay updated on emerging trends like green building technologies, smart city initiatives, or sustainable engineering practices. Reading whitepapers, attending webinars, or reviewing industry reports can help identify firms that might benefit from cutting-edge engineering solutions.

6. Set up a tracking spreadsheet or CRM entry where you can log potential opportunities. Record essential information like project name, lead source, estimated budget, timeline, and points of contact for each opportunity to keep all details organized and accessible.

7. Research competitor firms to identify recent projects they have won or markets they are entering. Understanding competitor focus areas can reveal potential gaps or opportunities for the firm to target.

8. Assess each opportunity for feasibility, considering the firm's expertise, current workload, and resource availability. Discuss with relevant project managers or technical leads if further evaluation is needed, ensuring that each potential project aligns with the firm's capabilities.

9. If feasible, contact project stakeholders or use available channels to inquire about pre-qualification requirements, timelines, or specific project needs. This proactive approach can provide the firm with a head start on competitive projects.

10. Compile findings in a clear, concise format for weekly review. Highlight high-priority projects, upcoming RFP deadlines, and key contacts for potential leads. Regular updates keep the business development team aligned on available opportunities.

11. Share your list of promising leads with the marketing team to explore targeted outreach efforts, such as introductory emails or LinkedIn connection requests. This step ensures a cohesive approach to potential client engagement.

12. Set periodic check-ins with the business development team to discuss progress on leads, gather additional input, and refine research focus areas as needed.

#### Task |Maintaining a Database of RFPs (Request for Proposals)

**Description of the Task**: A well-organized RFP database is critical for tracking upcoming projects and business opportunities. This task involves gathering, cataloging, and updating RFPs from various sectors that align with the firm's engineering services. By maintaining this database, the firm can quickly respond to relevant opportunities, manage submission timelines, and prioritize the most promising prospects, ensuring consistent engagement in the bidding process.

1. Set up a dedicated database in a tool like Excel, Google Sheets, or a CRM system to store all RFP information. Ensure the layout includes essential fields such as project title, client name, proposal submission deadline, project scope, budget estimate, and contact details.

2. Work with project managers or business development staff to establish guidelines on what information should be collected for each RFP. This may include project requirements, submission criteria, qualification details, and any specialized engineering disciplines involved.

3. Track reliable RFP sources, such as government contracting websites, industry-specific portals, and engineering association bulletins. Set up notifications or bookmark key pages to ensure you're capturing new RFPs as they are released.

4. When a new RFP is identified, enter it promptly into the database with complete information, including deadlines and requirements. Keeping the database updated allows the team to prioritize high-potential projects efficiently.

5. Organize RFP entries by priority level (high, medium, low) and submission deadline to make it easy for project managers to identify urgent or strategically important projects. Use color coding or a separate column to clearly mark each RFP's status.

6. For each RFP, note specific details such as required engineering services (e.g., structural, environmental, or civil), experience levels needed, and unique qualifications. This helps project leads quickly assess project alignment with firm capabilities.

7. Set calendar reminders for critical RFP milestones, such as pre-proposal meetings, submission deadlines, and proposal review dates. Sync with the team's project management system to ensure deadlines are visible to all relevant stakeholders.

8. Conduct weekly reviews of the database to update RFP statuses, add any new RFPs, and remove expired or declined opportunities. This keeps the database relevant and allows for easy retrieval of current projects.

9. Add fields for tracking each RFP's submission status and eventual outcome (e.g., submitted, shortlisted, won, or declined). Maintaining this history provides valuable insights for future proposal development and client engagement.

10. Archive completed or expired RFPs in a separate tab or folder for future reference. This archive serves as a valuable resource when preparing similar proposals, allowing the team to quickly reference past submissions or adjust based on previous feedback.

11. Share RFP information with proposal writers and assist with document organization, ensuring all requirements are clear and accessible. This step ensures that proposal writers have all necessary materials on hand for efficient drafting.

12. Summarize active RFPs in a weekly report, highlighting urgent opportunities, recent updates, and upcoming submission deadlines. Provide these insights to management to ensure alignment on project priorities.

13. Regularly collect feedback from project managers, proposal writers, and business development leads to improve the RFP tracking process. Adjust the database structure, if necessary, to better serve team needs and support efficient proposal tracking.



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#### Task |Posting Engineering Project Updates and Milestones on LinkedIn

**Description of the Task:** Sharing key project milestones, achievements, and updates on LinkedIn to highlight the firm's expertise and success in ongoing engineering projects. Regularly posting updates builds credibility, strengthens brand visibility, and showcases the firm's technical capabilities to a professional audience, helping to attract new clients and industry partners.

1. Gather project milestones and updates from project managers, ensuring you have detailed information on the current phase, key achievements, challenges overcome, and any notable contributions from team members.

2. Write concise, engaging posts that highlight technical accomplishments, milestones, or project progress. Incorporate engineering-specific language (e.g., "completed structural analysis," "installed energy-efficient systems," or "finalized environmental assessments") to resonate with an engineering audience.

3. Collaborate with the design or project team to obtain visuals such as site photos, CAD renderings, or charts that illustrate project progress. Make sure images align with LinkedIn's resolution and formatting guidelines for optimal presentation.

4. Use industry-related hashtags like #CivilEngineering, #StructuralDesign, or #SustainableEngineering to boost visibility among targeted audiences. Tag relevant team members, partners, or clients with permission to encourage broader engagement and acknowledgment.

5. Post updates at peak engagement times for LinkedIn (e.g., mornings or midday during weekdays) to maximize visibility. Use scheduling tools if necessary to maintain a consistent posting rhythm aligned with LinkedIn's engagement patterns. 6. Monitor LinkedIn notifications to track engagement on each post. Look for new comments, shares, and likes, and take note of any questions or feedback on the update. Being responsive helps reinforce the firm's reputation for engagement and openness.

7. Respond to comments promptly, thanking users for positive feedback or addressing questions in a helpful manner. Engage with likes and shares by reaching out with a brief thank you message, enhancing client and follower relations.

8. Use LinkedIn's analytics to track key metrics such as views, clicks, shares, and follower growth. Look for trends in post performance, such as which types of updates generate the most engagement, and take note of audience demographics to refine future content.

9. When possible, include an "employee spotlight" section to recognize team members who contributed to the project milestone. Briefly describe their role or specialization, as it adds a personal touch and emphasizes the firm's team-oriented culture.

10. Based on engagement data, determine whether additional post types like "project insights" or "industry trends" would appeal to followers. Share these updates regularly to showcase the firm's thought leadership and domain expertise.

11. Summarize LinkedIn engagement data into a report for the social media manager or relevant stakeholders. Highlight top-performing posts, engagement trends, and any actionable insights on audience preferences to guide future content strategies.

12. Gather feedback from the marketing or project team regarding the LinkedIn updates. Refine post content, timing, or visuals based on insights, ensuring that updates continue to align with the firm's communication goals and branding strategy.

## Task |Managing Website Content

**Description of the Task:** Managing the firm's website content ensures that all project information, service offerings, and team credentials are accurate and up to date. This task involves regularly reviewing and updating web pages, optimizing content for search engines, and ensuring the presentation of the firm's engineering capabilities is professional. A well-maintained website is crucial for attracting prospective clients, conveying trust, and reinforcing the firm's technical expertise.

1. If new marketing materials, such as project posters or service updates, are approved, prepare them for upload. Use your content management system (e.g., WordPress) and hosting platform to add these materials, ensuring the formatting and layout align with the firm's style guidelines.

2. Regularly review the website's pages and sections to ensure accuracy and relevance, especially technical details or project descriptions that might need periodic updates. Update any outdated information and check for consistency in engineering terminology and branding across the site.

3. Conduct keyword research to identify relevant terms for the engineering industry. Apply these terms within the site's pages, including updating meta titles, descriptions, and image alt text, to improve search engine visibility. Tailor these elements to highlight specific engineering expertise and services.

4. Check all internal and external links on the site to ensure they're functioning properly and redirect to relevant pages. This includes links to project portfolios, team pages, and industry resources. Ensure no broken links disrupt the user experience, which is essential for presenting a professional, client-focused image. 5. Optimize page load speed, mobile responsiveness, and overall site performance. Compress images, streamline code where possible, and review analytics to identify and address any technical issues that may impact the user experience, such as slow-loading project galleries or oversized media files.

6. Prepare periodic reports to summarize website performance metrics such as visitor traffic, bounce rate, page engagement, and conversion rates. Include details on any technical updates made, such as security patches, and provide recommendations for future improvements or enhancements based on analytics insights.

7. Regularly check for updates on plugins, themes, and overall site security settings to maintain a secure environment. Implement security patches and backups, as needed, to protect sensitive information.

8. Share website updates with project managers or senior staff to confirm that posted content aligns with current engineering projects and objectives. Implement any suggestions to better reflect the firm's capabilities and upcoming projects.

9. Stay informed of digital marketing and content trends within the engineering sector. Adjust content style, format, or focus to resonate with prospective clients or industry partners, showcasing the firm's expertise in areas like sustainable engineering, CAD design, or structural analysis.

#### Task |Drafting Blogs on Engineering Innovations and Industry Trends

**Description of the Task:** Writing blogs about cutting-edge engineering innovations and industry trends positions the firm as a thought leader in the engineering space. This task involves researching advancements, writing insightful articles, and engaging readers with content that demonstrates the firm's knowledge of emerging technologies and market developments. Such content enhances brand authority and builds trust with both current and prospective clients.

1. Research emerging trends, innovations, and recent advancements in the engineering field. Focus on areas directly related to the firm's specialties—such as structural engineering, sustainable design, or mechanical systems. Ensure topics align with the firm's expertise and potential client interests.

2. Gather information from reputable engineering sources, industry journals, and relevant news outlets. Use data, case studies, and examples of groundbreaking projects to support the content and add credibility to each blog post. Where applicable, include insights on how new trends may impact specific sectors, like civil infrastructure or environmental engineering.

3. Create a structured outline that includes an engaging introduction, main discussion points, and a strong conclusion. Break down complex topics into manageable sections, using subheadings to ensure readability. Include potential discussion points, such as industry challenges, solutions, or future implications, that can highlight the firm's insights.

4. Write each section in clear, professional language, focusing on the implications of the trend or innovation for both engineers and clients. Avoid excessive technical jargon; instead, explain key terms to make the content accessible to a broad audience. Highlight how the firm's work or services relate to the discussed trend, where relevant. 5. Use keywords relevant to the engineering industry, such as "sustainable engineering solutions" or "structural analysis innovations," throughout the blog to enhance search visibility. Focus on natural integration within the text and in key areas, like headings and meta descriptions.

6. Integrate visuals like charts, diagrams, or project images that complement the content and provide readers with a clear understanding of complex topics. If available, include infographics or CAD renderings that showcase the firm's technical expertise. Ensure each image has alt text for accessibility and SEO.

7. Carefully review the draft to ensure factual accuracy, proper terminology, and adherence to engineering standards. Verify that all technical data and examples are correct and align with industry practices. Check for grammatical errors and ensure the tone aligns with the firm's voice.

8. Share the draft with senior engineers, project leads, or other subject matter experts to gather input on technical accuracy and relevance. Adjust the content based on their feedback, ensuring it reflects the latest industry knowledge and the firm's perspective.

9. Format the blog for online readability, including a concise summary, bullet points, and bold headings. Confirm that SEO elements, such as meta descriptions and tags, are optimized. Once approved, publish the post according to the firm's content schedule.

10. Share the published blog on LinkedIn and other professional platforms to reach a wider audience. Tag relevant partners or industry leaders if applicable, and encourage colleagues to engage with and share the content, positioning the firm as a thought leader in the engineering industry.

#### Task |Managing Case Studies for Completed Engineering Projects

**Description of the Task:** Creating and updating detailed case studies that highlight the firm's success in delivering engineering solutions. By outlining project challenges, technical approaches, and successful outcomes, these case studies serve as valuable marketing assets, demonstrating the firm's ability to execute complex projects. Well-documented case studies help prospective clients understand the firm's capabilities and reliability.

1. Review recent and notable projects completed by the firm that showcase unique engineering solutions, innovative designs, or client-specific challenges. Prioritize projects that align with the firm's target markets or demonstrate technical expertise in areas like structural integrity, sustainability, or environmental impact.

2. Collect project-related documents, including design plans, blueprints, technical reports, and client feedback. Request input from project managers and engineers who worked directly on the project to capture in-depth insights into the challenges and solutions.

3. Create a structured outline that includes the project overview, client requirements, engineering challenges, solutions implemented, and results achieved. Organize the outline to highlight how the firm's approach addressed complex engineering problems or met unique project specifications.

4. Begin by crafting an introduction that briefly describes the project scope, the client's needs, and the project's significance in the industry. Aim to hook the reader by emphasizing the technical complexity or innovative elements that set this project apart. 5. Detail the firm's engineering approach, explaining the steps taken to address specific challenges. Use clear, professional language that highlights key technical aspects—such as structural engineering solutions, environmental considerations, or materials used—and their role in achieving project success.

6. Present measurable outcomes, such as improved efficiency, reduced costs, or enhanced structural performance, backed by data wherever possible. Include project milestones and any client testimonials to validate the success and impact of the project on their operations or goals.

7. Add images, diagrams, CAD renderings, or before-and-after photos to illustrate critical stages of the project and give a visual sense of scale and scope. Label each visual element to clarify its relevance to the project's success and ensure it supports the narrative.

8. Carefully review the case study to verify that all technical descriptions, data points, and engineering terminology are accurate. Consult project engineers to validate that each detail reflects the firm's standards and the project's specific requirements.

9. Structure the case study to improve readability by using bullet points, section headers, and highlighted quotes. Ensure that the formatting aligns with the firm's branding and includes a brief summary or "key takeaways" section for quick insights.

10. Coordinate with the marketing or content team to publish the case study on the firm's website and share it on professional platforms like LinkedIn. Archive the case study in the firm's database for easy reference, and tag it by project type, location, and engineering discipline to streamline future searches.

11. Share the completed case study in industry groups, email newsletters, or as part of proposal materials for prospective clients. Tailor promotion to emphasize the firm's expertise and underscore its success in tackling complex engineering challenges.

## Task |Creating Project Highlight Videos/Reels for Social Media

**Description of the Task:** Producing short videos or reels that showcase completed projects or engineering processes allows the firm to visually communicate its expertise on social media platforms. This task involves compiling footage, editing content, and creating engaging videos that capture the attention of potential clients and partners. Highlight videos are an effective tool for marketing the firm's technical proficiency and the real-world impact of its engineering projects.

1. Start by gathering high-quality images, drone footage, time-lapse videos, or other media assets that showcase the project's progress, unique engineering features, or final outcome. Coordinate with on-site teams to access recent visuals that highlight technical achievements.

2. Plan the video's structure, outlining key project phases, engineering challenges, and solutions to feature. Determine the project aspects that will resonate with clients, such as innovative designs, sustainability initiatives, or complex structural solutions.

3. Choose background music that aligns with the project's tone—upbeat for innovative projects, or more subdued for technically complex projects. If needed, prepare a voiceover script that emphasizes the project's purpose, technical details, and the engineering firm's expertise in solving specific challenges.

4. Begin editing by arranging the media assets to follow a cohesive storyline. Use short clips and transitions to create a dynamic flow, focusing on features like project scale, technical innovations, or engineering precision. Add captions and annotations to clarify key aspects.

5. Add the firm's logo, consistent fonts, and color scheme to align with brand guidelines. Apply subtle effects, such as zooming in on structural details or overlaying text to highlight specific achievements (e.g., "Reduced Carbon Emissions by 20%"). 6. Include on-screen text to display essential metrics, such as project completion date, square footage, or material specifications. Showcase quantifiable results—like increased efficiency or budget savings—to demonstrate the project's impact.

7. Adjust the video's dimensions and length to meet platform requirements for LinkedIn, Instagram, or YouTube. Ensure that captions are concise and engaging to capture the audience's attention within the first few seconds.

8. Collaborate with the project manager or engineering team to confirm that all technical details, terminology, and metrics are accurate. Check the final video for smooth transitions, audio clarity, and high-resolution visuals.

9. Write a brief caption summarizing the project's scope and significance, emphasizing the engineering firm's expertise. Add industry-relevant hashtags (e.g., #EngineeringSolutions, #InfrastructureInnovation) to increase visibility and attract potential clients.

10. Post the video on the firm's social media channels and monitor engagement metrics, such as views, likes, and comments. Track feedback and interactions to assess the audience's response and gather insights for future highlight reels.

11. Store the final video and all related assets in a designated folder for future access. Tag the content by project type, location, and engineering discipline to support easy retrieval for presentations, client meetings, or future marketing campaigns.



#### Task |Formatting Engineering Project Documents

**Description of the Task:** Organizing and standardizing technical reports, blueprints, and other project-related documents to ensure consistency and professionalism. Proper formatting is essential for maintaining clear communication between engineering teams, clients, and regulatory agencies. Well-organized documents help improve project efficiency and minimize errors, ensuring compliance with industry standards.

1. Begin by reviewing the client's formatting requirements and any specific guidelines related to the project documents. Each project may have unique formatting standards based on industry or client preferences, so ensure all guidelines are followed closely.

2. Gather all original Word documents related to the project and organize them into a dedicated folder for easy access. Label each document according to the project phase, such as "Design Phase" or "Inspection Reports," for proper categorization.

3. Adjust font types, sizes, headers, and footers based on the established formatting guidelines. Ensure uniformity across all elements, including margins, page numbers, and spacing. Verify that each document consistently follows the required formatting style.

4. With documents varying from 1 to 30 pages, adjust page layouts accordingly. Double-check that any tables, diagrams, or charts within the document are aligned with the text and formatted for readability and clarity.

5. Ensure that all headings, subheadings, and titles follow a uniform structure. Update or add a table of contents where necessary to facilitate easy navigation through longer documents or complex project specifications. 6. After verifying formatting consistency across all Word files, convert them to PDF format to preserve the layout. Ensure that all elements, including images, tables, and links, remain intact and properly displayed in the final PDF version.

7. Create a shared folder dedicated to project specifications and subfolders as needed for categories such as "Electrical" or "Mechanical." Upload the finalized PDF files to the shared folder, naming them according to the project's standardized naming conventions.

8. Share the completed folder with the designated reviewer for a quality check. Provide a brief description of any specific formatting choices or areas that may need additional review or adjustments before final approval.

9. Address any feedback received from the reviewer, revising the files as required. Re-upload the corrected files to the shared folder, ensuring that all requested changes are implemented accurately.

10. Once all documents are finalized, organize them into an archive folder within the project directory for future reference. Label the folder by project name and date to ensure easy retrieval when needed for project reviews, audits, or client requests.

#### Task |Reviewing Engineering Staff and Subcontractors Timesheets

**Description of the Task:** Verifying and processing timesheets submitted by engineering staff and subcontractors to ensure accuracy in billable hours and project cost tracking. Timely and accurate timesheet reviews are critical for managing project budgets, scheduling resources, and ensuring payroll reflects actual labor contributions to various engineering projects.

#### **Reviewing Timesheets**

1. Before beginning the review, ensure your role is set as "Project Executive" in the timesheet management system to access the appropriate permissions for reviewing and approving timesheets.

2. Navigate to the "Timesheet Periods" section of the system. This is where all timesheet entries for staff and subcontractors are stored, organized by project and week.

3. Use the filter option to narrow down the timesheet entries to a specific period. Click the down arrow next to "Start Date," then select "Filter" to begin entering the desired date range.

4. Input the start and end dates for the time period you are reviewing. Once the dates are selected, press "Enter" to apply the filter and load the appropriate timesheet data.

5. Click on the relevant start date, and the system will display the work hours for the resources (staff or subcontractors) during that period. This allows you to verify if their hours align with the work completed during that time.

#### **Opening and Processing Timesheets**

1. Go to the "Processing" tab and select "Time & Expense" from the dropdown menu. Then, choose "Create Timesheet Periods" to begin processing the new time entries for the given period.

2. Enter the "Start Date" and "End Date" for the week being reviewed, and assign a "Period #" (e.g., the corresponding Week #). This ensures accurate tracking of work periods for engineering staff and subcontractors.

3. Click "OK" to create the new timesheet period. This action will initiate the process of compiling and tracking the entries for the selected week.

4. Once the timesheet periods are created, review the entries to ensure that they have been correctly opened in the system. All periods should reflect the correct time frames and employee allocation.

#### **Tracking Timesheets**

1. Go to the "Timesheet Period" section of the system and select the period you are reviewing. This is where you can access the detailed entries for staff, contractors, and project hours.

2. Apply the date filter to focus on the start of the week for which you are reviewing timesheets. This helps to organize the entries and ensures that the correct week's data is being tracked.

3. For each engineering staff member or subcontractor, open their individual timesheet to review the work entries. Ensure that the hours listed align with project schedules and tasks completed.

4. Check whether employees are inputting their work hours on a daily basis. Daily timesheet entries help to ensure accuracy and provide clear tracking for billing and project management.

 If Daily Entries Are Correct: Maintain a spreadsheet to track the daily hours entered by each employee. This spreadsheet helps to cross-check and ensure that all hours are consistently recorded, streamlining the review process.

5. If an employee has not entered their hours daily, follow up with them to clarify the missing entries and ensure compliance with timesheet policies. Unreported hours may lead to delays in billing or inaccuracies in payroll processing.

#### Task |Supporting Vendor Contract Reviews

**Description of the Task:** Assisting with vendor contract reviews involves helping engineering teams assess terms, conditions, and pricing agreements with suppliers and service providers. This task ensures that contracts align with project requirements, timelines, and budget constraints. Proper contract management is key to maintaining smooth relationships with vendors and preventing costly delays or disputes during project execution.

1. Retrieve the most recent vendor contracts, amendments, or addendums from the relevant department (e.g., Procurement or Project Management). Ensure all related documents are stored in an organized, accessible folder, either in a shared drive or contract management system.

2. Review the vendor contract thoroughly, focusing on key sections such as deliverables, timelines, payment schedules, terms of service, scope of work (SOW), and warranties. Pay close attention to clauses related to project specifications, materials, timelines, and performance standards.

3. Create a summary document or spreadsheet that outlines important clauses, such as:

- a.Payment terms (e.g., milestone payments, invoicing procedures)
- b.Deliverables and deadlines
- c. Insurance and liability coverage
- d.Change order processes
- e. Dispute resolution
- f. Termination clauses This summary document should be used for internal reference and review by the project manager or legal team.

4. Ensure the contract aligns with the engineering firm's internal policies and industry standards. This includes checking compliance with safety standards, environmental regulations, and any specific client requirements that might be outlined in the contract.

5. Communicate with the project manager, procurement, or legal team to clarify any terms or request revisions. This might include discussing project timelines, scope changes, or negotiating better rates or terms with the vendor. Coordinate meetings or calls to ensure all parties are aligned on contract details.

6. Verify that all necessary supporting documentation from the vendor is included, such as:

- a.Proof of insurance and certifications
- b.Safety compliance documentation
- c. Licenses or permits specific to the project If any documentation is missing or incomplete, follow up with the vendor to ensure timely submission.

7. Identify any potential risks or liabilities that may impact the project or company. This could include unclear terms on project milestones, penalties for late delivery, or clauses that may expose the firm to unnecessary risk (e.g., excessive indemnification requirements). Document these issues for review by the legal team or senior management.

8. If any terms or clauses are ambiguous, unfair, or require clarification, draft a list of revision requests or recommendations for the vendor contract. This could involve suggesting changes to the scope of work, payment terms, or deliverables to better suit the needs of the engineering firm or the project.

9. Once all necessary changes have been made or agreed upon, prepare the finalized contract document. Ensure all revisions are clearly marked and ready for final approval. Submit the contract to the designated decision-maker (e.g., Project Manager or Legal Counsel) for their final review and approval before execution.

10. Once the contract is signed and approved, ensure that the final version is stored securely in the contract management system or shared drive, ensuring that it can be easily accessed by the project team and for future reference during the life of the project.

11. After the contract is in effect, periodically check in on the vendor's progress with meeting agreed-upon deliverables, timelines, and payments. Document any issues and escalate them to relevant stakeholders as necessary. Ensure that the vendor is meeting expectations and that all contractual obligations are being fulfilled.

#### Task |Coordinating Responses to RFIs (Request for Information)

**Description of the Task**: Gathering and coordinating responses to Requests for Information (RFIs) from clients, contractors, or regulatory bodies. RFIs are crucial for clarifying technical details and project specifications, ensuring that all stakeholders have the necessary information to move forward. Accurate and timely RFI responses help mitigate project delays and ensure alignment on project deliverables.

1. Regularly check the designated RFI email inbox or project management system for incoming RFIs from contractors, subcontractors, clients, or regulatory bodies. Ensure that all RFIs are documented and tracked for follow-up. Use a dedicated RFI tracking tool (or spreadsheet) to log each request with details such as submission date, project name, and deadline for response.

2. Carefully review the RFI to fully understand the question or clarification being requested. Identify if the RFI pertains to design specifications, project scope, materials, or regulatory compliance. Clarify any ambiguous questions by reviewing project documents (drawings, specifications, contracts) or by consulting with the relevant engineering team members.

3. Based on the nature of the request, assign the RFI to the appropriate subject matter expert within the engineering team (e.g., civil engineers, structural engineers, project managers). Ensure the responsible party understands the urgency and scope of the request. If necessary, provide context or additional information to the SME to help them provide a detailed and accurate response.

4. Work with the assigned SME to gather all relevant information, such as design specifications, drawings, engineering calculations, or technical reports, to fully address the RFI. If the RFI requires input from multiple departments (e.g., structural, mechanical, or electrical engineers), coordinate between teams to gather comprehensive and cohesive answers. 5. Once all necessary information has been gathered, draft a clear and concise response to the RFI. Ensure that the response is aligned with the project's scope, specifications, and compliance standards. Include any necessary supporting documentation or revisions to plans, drawings, or specifications if applicable. Review the response with the relevant engineers or project managers to confirm accuracy before finalizing it.

6. If the RFI response involves changes to the design, project scope, or schedule, ensure that the response is reviewed and approved by senior engineers or project management. Get sign-off from stakeholders before sending the final response.

7. Once approved, submit the RFI response to the requesting party (e.g., client, contractor, subcontractor). This may be done via email, project management platform, or through an official document submission system, depending on company protocols. Ensure that the response is sent within the required timeframe and that any necessary follow-up actions are clearly outlined.

8. Update the RFI tracking system or spreadsheet to document the response date, the final response provided, and any follow-up actions needed. This helps ensure that no RFIs are overlooked and that all necessary steps are completed. Keep a record of all correspondence related to the RFI for future reference, in case there are disputes or clarifications needed later in the project.

9. Follow up with the client or contractor to confirm that the RFI response has been understood and is sufficient. Monitor for any additional questions, clarifications, or requests for changes that may arise. Be proactive in seeking feedback to ensure that any potential issues are addressed quickly and efficiently.

10. Ensure that the final response to the RFI complies with all applicable standards, regulations, and industry best practices. Document the process and retain a copy of the response for record-keeping and project audits. If changes are made as a result of the RFI, update project documentation, drawings, and schedules accordingly.

## Task |Entering Data for Engineering Change Orders

**Description of the Task:** Accurately recording changes to project scope, materials, or specifications into the firm's project management system. Engineering change orders are vital for documenting any alterations that arise during the course of a project, ensuring that all stakeholders are aware of the modifications. Properly tracking change orders helps maintain budget control, manage client expectations, and ensure smooth project execution.

1. Start by reviewing the Engineering Change Order (ECO) request received from the project manager, client, or internal engineering team. Ensure that the ECO is complete and includes all necessary details, such as the scope of the change, reason for the change, affected systems or components, and any required approvals. If the ECO is incomplete, communicate with the relevant team to obtain missing information.

2. Assess the impact of the change order on the project's scope, timeline, and budget. Consult with the engineering team to understand the technical implications of the change and determine if additional resources or materials will be required. Make a note of any updates to project plans or schedules that will be impacted by the change.

3. Access the system or platform used to track and manage ECOs. This could be a project management tool, a document control system, or a custom database designed for tracking engineering changes. Ensure that you have the appropriate permissions to enter or update data in the system.

- 4. Enter the required details into the system, including: a.Change Order Number (if applicable)
  - b.Description of the Change (e.g., revised design, new materials)
  - c. Reason for Change (e.g., client request, regulatory compliance)
  - d.Affected Project Components (e.g., structural, mechanical, electrical)
  - e.Cost Impact (if available)

- f. Schedule Impact (revised completion dates or milestones)
- g.Approvals and Signatures (if the ECO has been reviewed and authorized) Ensure that all fields are correctly filled and the data is accurate.

5. If the ECO requires supporting documents, such as revised drawings, specifications, cost estimates, or impact assessments, upload or link these documents to the change order record. Ensure that all attachments are properly named and easily identifiable for future reference.

6. Once the change order data has been entered into the system, notify relevant stakeholders, including project managers, engineers, and contractors, that the change has been recorded. Provide a summary of the change and request any further actions or approvals needed. Ensure that all parties involved are aligned on the change and its impact on the project.

7. If the change order affects any project documentation, such as design drawings, technical specifications, or construction schedules, ensure that these documents are updated accordingly. Coordinate with the engineering team to ensure that all revisions are accurately reflected in the project files.

8. Monitor the approval process for the change order. If additional approvals are required from clients or senior management, follow up regularly to ensure that the approval is obtained in a timely manner. Record the approval dates and any comments or conditions that may apply to the change.

9. Once all necessary data has been entered and approvals obtained, review the change order record for accuracy. Ensure that all information is correct and complete, and that any applicable deadlines, cost adjustments, or schedule changes are properly documented. Finalize the ECO entry and lock it in the system.

10. After the ECO is finalized, communicate the change to the relevant team members, contractors, or stakeholders. Provide them with the updated documentation and any instructions for implementing the change. Ensure that all parties are aware of the new requirements and that any project workflows are adjusted accordingly.

11. Ensure that the ECO is properly archived in both the system and physical project files (if applicable). Keep a record of all correspondence, approvals, and revisions associated with the change order for future reference and audits.





#### Task |Following Up on Outstanding Payments

**Description of the Task:** Tracking and following up on unpaid invoices from clients to ensure timely receipt of payments for engineering services rendered. Managing outstanding payments is crucial for maintaining a healthy cash flow, ensuring projects continue without financial interruptions, and fostering strong client relationships through professional communication.

1. Open the existing accounts receivable spreadsheet in Excel or your preferred financial tracking system. Ensure you have the latest data from the accounting software or reports to work with.

2. Retrieve the most recent accounts receivable report from your accounting software, such as Zoho Books, and copy the relevant data, including client names, invoice numbers, due dates, and amounts due. Paste this information into the Excel spreadsheet, ensuring all fields are correctly aligned.

3. Organize the data by formatting it properly. Use clear headers such as "Client Name," "Invoice Number," "Invoice Date," "Due Date," "Amount Due," and "Amount Outstanding." Ensure dates are in a consistent format (e.g., MM/DD/YYYY) and that amounts are displayed in the appropriate currency with symbols for clarity.

4. Enter aging information into the spreadsheet, sorting invoices by their due dates. Create categories such as: a.Current (Invoices not yet due)

- b.1-30 Days Overdue
- c. 31-60 Days Overdue
- d.61-90 Days Overdue
- e.90+ Days Overdue

This helps you quickly identify which invoices need immediate attention based on their age.

5. Use Excel formulas to automatically calculate the total outstanding balance in each aging category. This will allow you to quickly see how much money is outstanding across different periods. You can also calculate the overall accounts receivable balance for better financial visibility.

6. Log in to Zoho Books or your chosen accounting software and compare the totals in your Excel sheet with the accounts receivable report within the system. Look for discrepancies or missing data, such as payments not yet recorded or invoices that may have been inadvertently omitted.

7. Once the data has been reviewed and reconciled, save the updated spreadsheet securely. Consider backing up the file to a cloud service or a secure server, ensuring the data is safely stored for future reference and audit purposes.

8. Log in to Zoho Books and navigate to the Accounts Receivable section. Import the updated accounts receivable data from your Excel spreadsheet into the system using the import feature. This ensures all the client balances, aging data, and outstanding payments are reflected in the accounting system.

9. Double-check the imported data in Zoho Books to ensure that all invoices, payments, and outstanding balances match the figures from your Excel sheet. Cross-reference details such as client names, invoice numbers, and amounts to ensure there are no discrepancies.

10. Once the accounts receivable records are updated, draft and send reminder emails to clients with outstanding payments. Include details such as the invoice number, amount due, and due date. Highlight the importance of timely payment to avoid project delays and maintain a strong business relationship. Be polite but firm, especially for overdue payments.

11. Monitor responses from clients regarding the payment reminders. If necessary, make follow-up calls or send additional reminders, focusing on clients who have delayed payments or have not responded to initial emails. Record these follow-up activities and update the accounts receivable log accordingly.

12. Regularly communicate with internal project managers or accounting teams to track the status of payments, especially for project-based work. Ensure that all payments related to ongoing engineering projects are collected promptly to maintain cash flow and avoid delays in project execution.

13. Once payments have been received, update the financial records to reflect those payments. Regularly review the accounts receivable reports to ensure your financial statements are accurate and that there are no outstanding discrepancies in client payments or project expenses.

# Task |Creating Time & Materials Invoices

**Description of the Task:** Generating invoices based on actual labor hours and material costs used for specific engineering projects. Accurate time & materials invoicing is essential for ensuring clients are billed fairly and transparently, which directly impacts project profitability and financial tracking. It also helps maintain client trust by clearly itemizing project expenses.

1. Ensure your role is set to "Project Executive" within the system to access necessary invoicing functions.

2. Navigate to the "Invoice Suggestions" section on the home page of the invoicing software. Note that certain projects may only be billed on a monthly cycle, so be mindful of billing frequencies.

3. Choose the relevant project number for which the invoice needs to be generated. Be aware that some projects cannot include specific charges like meals, mileage, or project management fees. If necessary, uncheck the "Chargeable" box for these line items or select "Process" and "Create Invoice," ensuring to adjust charges as needed.

4. If no adjustments to the charges are required, proceed by clicking "Process," followed by "Create Invoice." Once done, click "OK" to confirm and "Close" to finalize.

5. Click on "Show Document" to preview the invoice before finalizing. The due date should auto-populate based on the project settings. Ensure the external document number is the Purchase Order (PO) number, which should typically be present for invoicing.

6. In the "Lines" section, the first line will typically display a comment with the project name. Double-check the charges in the following lines to ensure that all entries are accurate, reflecting the correct materials, labor, and expenses for the project.

#### 7. In the "Invoice Details" section:

- a. Ship Date: This will auto-populate as the posting date.
- b. Payment Terms Code: This field will also auto-populate.
- c. Tax: Most invoices will not be taxable, so you can skip this section.
- d. Department Code: Leave this blank.
- e. Office Code: Set to "N/A." Once reviewed, select "Update Lines" to confirm the changes.

8. Ensure all details under the "Shipping and Billing" section are auto-filled and accurate. Once verified, select "Posting," then "Draft Invoice." Preview and close the document.

9. The invoice document will pop up. Download it and rename it using the format: "INV# [Customer Name] [Project Name]."

10. Email the invoice to the project manager (PM) for approval. Use the subject line: "Approval Needed: INV# [Customer Name] [Project Name]." Make sure the email is sent from the official accounting email address. Follow up if no response is received within 24 hours.

11. Record the invoice details in the invoicing tracking spreadsheet (Invoice List) for accurate tracking and reference.

12. Move the email containing the invoice to the "Invoices to Customers" folder for proper filing and organization.

- 13. If the project manager requests any corrections:
- a. Access the invoice in the invoicing system.
- b. Modify descriptions or charges as necessary, such as adjusting timecard comments or removing incorrect charges (via the "three dots" option to delete lines).
- c. After corrections are made, reprocess the invoice by selecting "Draft Invoice," then "Preview and Close."
- d. Save the updated invoice with the same name, appending "Corrections" to the file name. Send the revised invoice to the PM for final approval.
- e. Update the spreadsheet with the corrected invoice details and send date.

14. Once approved, update the posting date if it differs from the draft date. Navigate to the "Sales Invoice" section, select the invoice, and click "Post & Send." The email details will automatically populate with the new invoice number.

15. When posting is complete, ensure the invoice is attached to the email. Copy the email body from previous communications and include relevant project and payment details. CC the accounting team, the PM, and any other relevant stakeholders. Update the spreadsheet with the posted invoice date.

16. If there are billing rate changes, collaborate with the appropriate team members (e.g., senior accounting or project managers) to ensure journal entries are updated accordingly. For expense corrections, navigate to the "Invoicing" section, uncheck the "Chargeable" box for any incorrect charges, and make the necessary adjustments. If there's a request to change a specific amount (such as a credit card charge), obtain proper approval before proceeding.

#### Task |Managing Proposals and Invoice Data in Zoho Books

**Description of the Task**: Organizing and maintaining detailed records of engineering project proposals and invoices within the Zoho Books accounting platform. Proper management of this data is crucial for tracking project bids, monitoring client payments, and ensuring that financial records align with project timelines and deliverables. Efficient record-keeping supports better decision-making and financial oversight.

1. When a proposal-related email is received, promptly download any attached PDF or Word documents. If no attachments are included, download the email itself as a PDF for consistency in record-keeping.

2. Ensure all proposal documents are correctly formatted. If the original document is in Word or email format, convert it to a PDF file to streamline attachment in Zoho Books.

3. Log in to Zoho Books and navigate to the designated project entry area. Begin by inputting critical details including:

- a.Project Name: Ensure it aligns with the naming convention used across the firm's projects.
- b.Client Name: Verify client details are accurate, as these appear in invoicing and reporting.
- c. Proposal Date: Use the date listed in the proposal to maintain clear project timelines.
- d.Invoice Label: Ensure each proposal and invoice is tagged with the correct label for easy tracking and retrieval.

4. For proposals with multiple line items or invoice categories, calculate the subtotal for each line item. Verify totals for accuracy, especially if there are cost breakdowns for materials, labor, or other project phases.

5. Attach the converted PDF file to the project entry in Zoho Books. Ensure the attachment is legible and complete, reflecting all proposal details needed for approvals and client review.

6. Once all information is entered and verified, submit the proposal entry for internal approval through Zoho Books. Ensure all required fields are completed, as this will streamline the approval process. Notify relevant team members if follow-up or expedited approval is needed for time-sensitive projects.

#### Task |Reviewing Credit Card Transactions for Project-related Expenses

**Description of the Task:** Auditing credit card statements to identify and categorize expenses related to specific engineering projects. Regularly reviewing these transactions ensures that all costs are accurately assigned to the correct project, helping maintain budget accuracy and providing transparency for project accounting.

1. Log in to the online banking platform associated with the company's business credit card. Ensure you select the account linked to project-related expenses to streamline reconciliation and tracking.

2. Identify the business credit card designated for project expenses. This ensures that only relevant transactions—such as vendor purchases, equipment rentals, or travel expenses for project teams—are reviewed in this session.

3. Download the latest statement or transaction history as a PDF file for record-keeping. Ensure that you save it in the appropriate project folder, labeled with the date for easy retrieval.

4. Review each transaction listed on the statement against entries in the firm's accounting system (e.g., Business Central or other software used). Confirm that each expense is correctly logged under its associated project code or cost center for accurate tracking.

- a.For Missing Entries: If a transaction is not yet entered, identify the team member responsible for the expense.
- b.Expense Type Confirmation: Ensure that the expense aligns with project-related categories like materials, subcontractor services, or project team travel.

5. For any unrecorded expenses, send a reminder to the relevant team members or project leads to submit receipts. Provide guidance on uploading or entering receipts in the accounting system if necessary.

6. Track any inconsistencies between the credit card statement and the accounting records, noting missing receipts or unclassified expenses. Prepare a brief summary for the accounting team, detailing unresolved items that may require further follow-up.

7. Once each transaction has been verified and accounted for, ensure all entries in the system match the downloaded statement. Save the reconciled PDF statement in the designated project expense folder, labeled with the reconciliation date for easy reference.

#### Task |Entering Credit Card Charges for Project-Specific Materials and Vendor Payments

**Description of the Task:** Logging and categorizing credit card charges related to project materials and vendor payments in the firm's accounting system. Accurately recording these expenses ensures that project costs are properly tracked, which is essential for staying within budget, managing vendor relationships, and ensuring smooth project delivery.

#### **Entering Credit Card Expenses - Overhead**

1. Ensure that invoices or receipts for overhead expenses are submitted by employees. Verify the transaction details, including the last four digits of the card used, vendor name, date, purpose of the expense, and overhead account allocation.

2. Access Business Central and set the role to "Business Manager." This ensures the right permissions are active for overhead expense entries. Adjust the role by navigating to "My Settings" and saving changes.

3. In Business Central, go to "Journals" and select the "Purchase Invoices" journal. Create a new invoice entry, select the vendor, and enter essential details like Posting Date, Document No., Account Type, and Amount.

4. Attach the original receipt or invoice by selecting the "Attachment" option and uploading the document.

5. After reviewing for accuracy, submit the overhead expense entry by selecting "Request Approval & Send," routing it to the assigned reviewer for validation.

#### Entering Credit Card Expenses - Vendors Prepaid

1. Ensure all prepaid expense receipts are sent by employees to the accounting team. Confirm details such as the card's last four digits, vendor name, purpose, and charge allocation. Download and prepare the receipt for entry.

2. Set the role to "Business Manager" to enable prepaid vendor expense entry functionality. Navigate to "My Settings," select the appropriate role, and save the setting.

4. In Business Central, go to "Purchasing," search for the relevant vendor, and start a new purchase invoice. Fill out key information, including Document Date, Posting Date, and Description.

5. Under the "Lines" section, enter the G/L Account Number, Description (updated if needed for clarity), Department Code, and Amount. Confirm that all information aligns with the prepaid vendor charge.

6. Attach the invoice to the entry and perform a final preview by selecting "Preview Posting" to verify the data. After reviewing, click "Request Approval & Send" to forward the entry to the assigned reviewer.

# Entering Credit Card Expenses - Project-Specific Materials

1. Collect receipts from employees specifying the project name, project code, and purpose. Confirm details such as vendor name, card last four digits, and date, ensuring each transaction is accurately categorized under the appropriate project.

2. In Business Central, set the role to "Project Business Manager" to ensure access to project-specific fields and functionalities.

3. Go to "Purchase Invoices" under "Journals," create a new entry, and select the project vendor. Fill out fields including Document Date, Posting Date, Project Code, *G/L* Account Number, and Amount.

4. Attach receipts or invoices under the "Attachment" section to maintain a record of project-specific expenditures.

5. Perform a final check by selecting "Preview Posting." Once all data aligns, submit the entry by clicking "Request Approval & Send" to the reviewer.



#### Task |Sourcing Candidates with Specialized Certifications via LinkedIn Recruiter

**Description of the Task:** Using LinkedIn Recruiter to identify and connect with candidates who hold specialized certifications required for engineering roles, such as Professional Engineer (PE) licenses or CAD software proficiency. Sourcing qualified candidates is critical for ensuring the firm has the technical expertise needed to deliver complex engineering projects and maintain competitive capabilities in the industry.

1. Log in to LinkedIn Recruiter with authorized credentials, ensuring the account is set up to access all relevant job posting and candidate search tools specific to engineering roles. Confirm the job requisition details and candidate requirements, including specific certifications like PE (Professional Engineer), PMP (Project Management Professional), or LEED (Leadership in Energy and Environmental Design).

2. Use LinkedIn Recruiter's advanced search filters to identify profiles with the exact qualifications and certifications required for the role. Set criteria for key factors such as years of experience in engineering fields, relevant technical skills (e.g., AutoCAD, BIM modeling), and expertise in sectors like civil, electrical, or mechanical engineering. Fine-tune the search to prioritize candidates with industry-recognized certifications.

3. Assess profiles against the specific job requirements, looking closely at their experience on similar projects (e.g., large-scale infrastructure, HVAC systems, renewable energy installations). Review endorsements, recommendations, and skills listed to ensure candidates meet the firm's standards for technical proficiency and project management.

4. Craft and send personalized LinkedIn InMail messages to promising candidates. Clearly outline the job role, scope of responsibilities, and relevance of their certifications to the engineering project. Include information about the company's portfolio and any relevant project details to attract candidates with industry-specific skills and experience. 5. Coordinate with the hiring team to identify optimal interview windows. Communicate with candidates to schedule interviews, ensuring alignment with both the hiring manager's and candidate's availability. Provide candidates with any pre-interview details they may need, such as insights into the project team and current projects.

6. Maintain an organized and up-to-date pipeline within LinkedIn Recruiter to track each candidate's progress. Create distinct stages for each step in the hiring process, from initial outreach through interviews, allowing the hiring team to monitor the status of candidates and manage follow-ups efficiently.

7. Record each interaction in LinkedIn Recruiter, documenting key notes from communications, interview scheduling, and candidate responses. This ensures accurate record-keeping of each candidate's journey, allowing for easy handoffs to the HR team or hiring manager for review and next steps.

8. Based on the feedback from the hiring team and initial candidate responses, adjust the search criteria to better align with the firm's project-specific needs. Update search filters or outreach messaging to increase engagement with highly qualified professionals in the engineering sector.

#### Task |Screening Resumes for Project Engineer and CAD Designer Roles

**Description of the Task**: Reviewing resumes to assess candidates' qualifications, experience, and technical skills for roles such as Project Engineers and CAD Designers. Effective resume screening ensures that only the most qualified candidates are advanced to the interview stage, helping the firm build a strong team capable of meeting project demands and adhering to engineering standards.

1. Begin by thoroughly reviewing the specific qualifications, technical skills, and project experience required for both Project Engineer and CAD Designer roles. This includes understanding any required certifications (e.g., PE for engineers), software proficiencies (AutoCAD, Revit, SolidWorks), and industry-specific experience (such as civil, electrical, or mechanical projects).

2. Define key attributes to filter resumes, including minimum years of experience, relevant engineering discipline, and specific skill sets. For a Project Engineer, prioritize project management experience, familiarity with regulatory standards, and skills in budgeting and scheduling. For CAD Designers, focus on expertise in CAD software, drafting precision, and experience with engineering documentation.

3. Conduct an initial scan of each resume to quickly identify candidates who meet the foundational qualifications. Look for keywords and phrases that align with the job description, such as "AutoCAD," "project management," "construction drawings," and "BIM modeling." Eliminate resumes that lack these essential qualifications or show experience unrelated to engineering design or project management.

4. For Project Engineer roles, ensure candidates have relevant software experience (e.g., MS Project, Primavera) and familiarity with industry-specific standards (such as ASME, ANSI). For CAD Designers, verify proficiency in CAD and modeling software; note any advanced skills in software like Civil 3D, Rhino, or Tekla that could be advantageous for specific projects. 5. Review each candidate's industry background to match them with the firm's primary project types. For example, if the engineering firm focuses on structural or infrastructure projects, prioritize candidates with experience in these areas. Note any complex or large-scale projects, which may indicate strong project handling skills and a familiarity with multi-disciplinary coordination.

6. Check for certifications such as Professional Engineer (PE) for Project Engineers or Certified CAD Technician (CCT) for CAD Designers. Ensure candidates also meet educational requirements, typically a bachelor's degree in engineering for Project Engineers and relevant technical or CAD training for CAD Designers.

7. For Project Engineers, assess indicators of project management experience, such as references to handling budgets, timelines, and client communication. For CAD Designers, look for indications of teamwork and collaboration with engineers or architects, as well as attention to detail in design and documentation.

8. Highlight any exceptional achievements, such as managing multi-million-dollar projects, completing complex structural designs, or contributing to innovative engineering solutions. Candidates with such accomplishments are likely to bring valuable insights and skills to the firm's projects.

9. Compile a list of resumes that align closely with the job requirements and firm's needs. Record relevant observations, such as software expertise or notable projects, to streamline interview preparation. Prepare a summary of each shortlisted candidate's qualifications and experience for easy reference by the hiring manager or recruitment lead.

10. Maintain a well-organized file for each candidate, including notes on qualifications, strengths, and areas of potential interest. Track the progress of each resume to ensure all candidates are screened consistently and that no strong profiles are overlooked.

#### Task |Managing New Engineering Staff Onboarding Documentation

**Description of the Task:** Organizing and maintaining onboarding paperwork for new hires, including employment contracts, certifications, and compliance documents. Proper management of onboarding documentation ensures new engineering staff are integrated smoothly into the firm, with all necessary regulatory and project-specific requirements met, supporting both HR compliance and project readiness.

1. After receiving the new hire's information, gather required documents such as identification, educational certificates, licensing (e.g., Professional Engineer, FE/EIT certifications), and any other role-specific credentials. Verify that documents meet industry standards and company requirements before proceeding.

2. Assemble an onboarding packet that includes essential documents such as the offer letter, employment contract, and non-disclosure agreement. Include additional forms relevant to engineering roles, such as confidentiality agreements for sensitive project data, project safety guidelines, and compliance forms for industry regulations (OSHA, ANSI, etc.).

3. For engineering roles, include documents related to health, safety, and compliance training. Prepare an acknowledgment form for new hires to sign, confirming that they understand company policies on site safety, equipment handling, and emergency procedures. Track completion dates for safety and compliance training modules required before project assignments.

4. Work with IT to ensure new hires have access to essential software tools (AutoCAD, Revit, MS Project, etc.) and project management systems. Prepare login credentials, access instructions, and tutorials as needed. Confirm that permissions are granted according to each employee's role, ensuring compliance with company data security and confidentiality protocols. 5. Assist the new hire in verifying documents with HR or compliance. Ensure they review policies specific to engineering practices within the firm, including any project-specific procedures, CAD standards, and quality control processes. Document completion of this step in the employee's onboarding file.

6. Provide an overview of any active projects the new engineer may join, including project objectives, timelines, key contacts, and relevant engineering standards. Include documents like design protocols, project schedules, and quality assurance checklists to give them a solid understanding of ongoing assignments.

7. Prepare documentation explaining the firm's quality control standards, reporting processes, and engineering documentation formats. Ensure new hires understand procedures for submitting drawings, calculations, and other deliverables in compliance with the firm's guidelines.

8. Arrange introductory meetings with key team members, including project managers, senior engineers, and department heads. Provide a meeting agenda that includes an overview of the new hire's role in upcoming projects and specific onboarding items, such as training on project workflows, team communication standards, and review of any ongoing tasks.

9. Maintain a checklist of all completed onboarding steps for each new engineer. This should include submitted documents, verified certifications, software access, safety training, and introductory meetings. Document any follow-up actions or pending items and set reminders to ensure a smooth onboarding process.

10. Once all steps are completed, archive the new hire's onboarding documentation securely in the company's HR or document management system. Ensure that all files are labeled and categorized for easy access during audits, performance reviews, or future project assignments. Backup copies should also be saved per company policy for record-keeping.

#### Task |Updating Job Descriptions for Specific Engineering Disciplines

**Description of the Task**: Revising job descriptions to reflect the evolving skills, qualifications, and responsibilities for specific engineering disciplines within the firm, such as civil, mechanical, or electrical engineering roles. Keeping job descriptions current is essential for attracting top talent and ensuring clarity in employee roles, which ultimately supports project efficiency and team alignment.

1. Access the current job descriptions within the firm's documentation management system. Collect relevant engineering industry standards and qualifications for the targeted disciplines, such as civil, structural, mechanical, or electrical engineering, to ensure job descriptions align with best practices and technical requirements.

2. For each engineering discipline, identify core competencies and technical skills required for success in that role. For example, a structural engineer may need expertise in load calculations and CAD software, while a mechanical engineer may require knowledge in thermodynamics and materials science. Outline key areas for enhancement based on these role-specific competencies.

3. Coordinate with senior engineers or department leads to discuss any changes in project needs, technology, or industry practices that should be reflected in the job descriptions. Gather their input on role expectations, project-specific qualifications, or any specialized certifications that should be included, like PMP, PE, or LEED certification for relevant roles.

4. Conduct a quick market review to see how similar positions are described in other engineering firms, noting any emerging skills or tools (e.g., BIM, finite element analysis) that may be relevant. Use this information to ensure the firm's job descriptions stay competitive and attract qualified candidates with up-to-date expertise. 5. For each role, adjust the responsibilities section to emphasize core tasks, such as project design, site inspections, report preparation, or compliance with regulatory standards. Under technical requirements, list specific software or tools, like AutoCAD, MATLAB, or project management platforms, to set clear expectations for candidates' technical proficiency.

6. Review and update the qualifications to ensure they reflect the level of expertise required. Specify any degree requirements (e.g., Bachelor's in Civil Engineering, Master's in Environmental Engineering), relevant certifications (e.g., FE, PE, CEM), and minimum years of experience. Include any preferences for prior experience in specific project types (e.g., infrastructure, commercial construction) based on feedback from department leads.

7. Add metrics or outcomes that would indicate successful performance in the role. For example, a project engineer might be expected to manage project timelines within a 5% variance or maintain a certain level of client satisfaction. Incorporate any specific contributions to project phases or deliverables to give potential candidates a clear understanding of performance expectations.

8. Adjust the language to promote an inclusive work environment, emphasizing the firm's commitment to diversity. Use terms that are industry-appropriate yet welcoming, avoiding jargon that could be confusing to candidates from different backgrounds.

9. Organize the document to ensure clear headings for sections like Responsibilities, Requirements, Skills, and Preferred Qualifications. Format each section with bullet points for easy readability and to maintain consistency across all job descriptions in the company's documentation style.

10. Send the revised job descriptions to the designated reviewer or department lead for approval. Ensure all feedback is incorporated and that any final adjustments are made in line with firm policies or additional guidance from engineering management.

11. Once approved, upload the updated job descriptions to the company's internal database or recruitment platform. Archive previous versions per the firm's document retention policies, labeling the new files with the date of revision for tracking purposes.

12. Send an internal update to the HR and recruitment teams, as well as any hiring managers, to inform them that the job descriptions have been refreshed. Include a brief summary of the changes to align everyone on the new requirements and expectations for each role.