

OPERATIONS

Installation Manager Guide

Role, procedures and reference for the installation manager, site supervisor and site checker.

Johannesburg operations

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1.0

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Dane

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Internal

ABOUT THIS GUIDE

How to use this guide

This guide is the working reference for anyone doing the installation manager role at The Kitchen Studio. It explains how a job runs from the first file to the signed handover, what to check at each stage, who to contact, and what you can and cannot decide.

Where to look	For
Part 1	The role, the rules that apply to every job, your authority, and who does what.
Part 2	The daily and weekly routine, and the daily report.
Part 3	The eight stages of a job, from receiving the file to finishing the installation.
Part 4	Site checks: the procedure and the detailed checklists.
Part 5	Delivery, quality control while fitting, shortages and remakes, and what to do when things go wrong.
Part 6	Completion, the client walkthrough, sign-off and closing the file.
Part 7	Who to contact for what, the people directory and escalation.
Part 8	The trackers, the job file, photos and video, and working safely.
Part 9	Taking over an existing job.
Appendices	Forms to copy, templates and the glossary.

Document control

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Review	When processes change, or at least once a year.

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PART 1

Role and authority

What the role is, the rules that apply to every job, what you can decide and who does what.

1.1 Your role

Take responsibility for each job allocated to you, from the first plan review through installation, snag resolution and signed handover. Keep the client, consultant and office informed.

Each job has one accountable installation manager. A consultant, fitter or admin name is not proof of technical ownership. Avoid two managers giving the fitter different instructions.

The role has three parts	What it means
Installation manager	Review scope, drawings, quantities, finish, special items, fitting allowance, delivery dates and dependencies before allocating labour. Plan fitters, assistants, vehicles, tools, parts and visits with Tashiana. Track progress against the fitting allowance. Own technical follow-through: shortages, remakes, factory queries, site decisions, return visits and final inspection.
Site supervisor	Brief fitters, inspect workmanship, resolve technical questions, and coordinate with the client, builder and other trades.
Site checker	Measure and mark out the full approved layout and services, record actual site conditions, and report clashes before manufacture or fitting. Keep a marked-up plan, dated photographs, a visit report and an updated action list. Attend site meetings and circulate decisions.

1.2 Five habits and the rules at a glance

- 1 Use the correct job number and latest approved drawing revision. Never guess.
- 2 Compare what is on site with what is on the plan, and record the difference.
- 3 Every outstanding item needs an action, one owner and a target date.
- 4 Report a delay or error as soon as you find it. Give the next step, not only the problem.
- 5 Check the result yourself before calling an item complete.

Rule	Detail
Drawings	Use the latest approved drawing revision and the correct job number. Never guess.
Differences	Differences over about 20 to 30 mm are flagged for attention. Smaller differences that affect fit still count.
Site check	Measurement before manufacture, readiness before delivery, quality after fitting. Passing one does not pass the others.
Pre-delivery check	About two weeks before the proposed delivery date.
Fitting allowance	Keep one or two days in reserve for returned parts, adjustments and cleaning. Refer unrealistic allowances to Dane.

Rule	Detail
TGS measuring schedule	Sent every Thursday for the following week.
Payment	Never rely on a client saying they paid. Delivery needs confirmation from accounts or the authorised person.
Outstanding items	One action, one owner, one target date.
Reporting	Daily report the same day. Urgent items immediately, not at day-end.
Weekly review	With Dane and Tashiana: missed dates, fitting days, remakes, quality, sign-offs.
Completion	Physical completion, client acceptance and commercial closure are three separate steps.

1.3 What you can decide, and what you cannot

Do not promise discounts, free extras, a revised design, unapproved labour or a factory delivery date. Get written approval from the relevant decision-maker and file it.

You can, and should	Get written approval first	Never
- Report, measure, inspect and coordinate within the approved scope. - Stop the affected task where drawings, dimensions, services or safe fixing are unresolved. - Brief fitters and inspect workmanship. - Raise shortages, remakes and factory queries. - Keep one register of missing, damaged, incorrect and returned items.	- Discounts or free extras (consultant or authorised approver). - A revised design or specification change (consultant). - Extra labour, travel or accommodation (Dane, before committing). - A manufacturing change (confirm with Tashiana who can authorise it). - Release of an AMBER or RED site check (the designated approver). - Any payment change (accounts).	- Promise a factory delivery date. - Improvise design changes or hide a mismatch with an unapproved site alteration. - Move electrical, gas or plumbing services unless authorised and qualified. - Certify specialist work outside your competence. - Mark a job fully complete while agreed scope remains. - Treat a payment message or a document title as proof of payment.

1.4 Who does what

Role	Responsibility
Dane	Job allocation, escalations, priorities and approvals outside your authority.
Peer installation manager	Technical handover and shared-resource coordination.
Tashiana	Programme, maintenance coordination, shortage and remake tracking, client and admin follow-ups, records.
Danielle	Job packs, document control, delivery and admin support, visit logging.
Vince	Warehouse picking and loading coordination, and records.

Role	Responsibility
Norman	Stores and hardware support.
Consultant	Design and scope decisions, approved drawings, client variations, pricing, payment and charge or no-charge decisions, with the authorised approver.
Factory	Technical and production response, and confirmed dispatch dates.

Ask Tashiana to confirm the current factory contact directory. Do not guess who can authorise a manufacturing change. The full directory is in Part 7.

PART 2

Daily and weekly routine

Recommended daily rhythm. Agree the actual briefing and reporting times with Dane and Tashiana.

2.1 Your day

BEFORE FITTERS LEAVE EACH MORNING

- ☐ Review yesterday's reports, unresolved snags and today's priorities with Tashiana; agree allocations with the other installation manager.
- ☐ Confirm attendance, lead fitter, assistants, transport, address, site contact, access time and keys/security arrangements.
- ☐ Brief each fitter on today's exact rooms/tasks, drawing revision, known defects, sequence, target output and expected finish.
- ☐ Confirm the correct parts are physically available and checked: quantities, finish, handedness, hardware and any remakes.
- ☐ Check tools, consumables, protective materials and task-appropriate safety arrangements; identify work needing a specialist trade.
- ☐ Confirm other-trade dependencies and the next check-in. Ask the fitter to repeat the task and any hold point back to you.

DURING THE DAY ON SITE

- ☐ Inspect priority/new/problem jobs first. Check actual work against the plan and morning target.
- ☐ Check set-out before fixing or cutting; inspect the first installed section before repeating the detail.
- ☐ Take overview and close-up photographs. Deal with problems immediately; record decisions and who approved them.
- ☐ Speak to the client/site representative about progress, disruption and the next visit. Keep commercial questions with the consultant.

BEFORE FINISHING EACH DAY

- ☐ Obtain each fitter's completed work, remaining work, attendance/time, shortages, damage and photographs.
- ☐ Update the job action list and programme with Tashiana; confirm each blocker's owner and date.
- ☐ Confirm tomorrow's parts, access, people and vehicles. Delivery/truck information must be accurate and available the day before.
- ☐ Send a concise daily report: Job | completed | remaining | blocker | owner | next date | decision needed. Escalate urgent items immediately, not at day-end.

2.2 The daily report

Send a concise report the same day, in this format. Escalate urgent items immediately, not at day-end.

Job	Completed	Remaining	Blocker	Owner	Next date	Decision needed
Example job: kitchen	Base units and island fitted	Wall units; worktop readiness photos	End panel arrived in wrong finish	Tashiana with Sharm	Friday, ETA to confirm	Approve remake specification

Example only. Agree the actual reporting time with Dane and Tashiana.

2.3 The weekly review

Review all allocated jobs with Dane and Tashiana: missed dates, fitting days used/remaining, unresolved remakes, quality issues, client commitments and sign-offs. Agree the next week's programme and corrective actions.

PART 3

The life of a job

Eight stages, from the first file to the signed handover. Each stage names who to contact first.

3.0 The stages at a glance

Stage		Outcome	Main contacts
1	Receive and understand the job	Production file, scope, drawings and fitter all agree	Danielle; the consultant; Tashiana
2	Plan with the client	Client, factory and team work to one plan	Tashiana; Sharm or Jody
3	Carry out the site check	Site compared with the drawings; differences recorded	Consultant; Ashlen, then Jody
4	What to check against the factory plan	Every room checked; differences marked	Consultant; Ashlen, then Jody
5	Prepare for delivery	Site, factory, team and account ready before dates are promised	Sharm or Jody; Pravesh; Tashiana; Seema
6	Brief the fitter and start correctly	Fitter understands the job; goods and site checked before fitting	Tashiana; Vince; Norman
7	Supervise progress and resolve parts	Progress tracked; shortages and returns closed	Tashiana; Pravesh; Sharm or Jody; Vince; Norman; Julie or Vinayshree
8	Coordinate worktops and finish the installation	Worktops measured, work inspected, client signs off	Charlene; Tashiana; Seema

3.1 Receive and understand the job

Start with the full production file from Danielle. Understand every area as if you were going to fit it yourself.

WHO TO CONTACT

Danielle for the file and administration. The job's designer or consultant for design and scope queries.

- 1 Check the file**

Confirm the client name, contact details, site address, signed contract, invoicing instructions and latest approved factory plans. Check the distance from Midrand and any consultant notes, client instructions or approved changes.
- 2 Match the scope**

Compare every area on the contract, invoicing instructions and plans. Make sure they agree. Check the contract value, each area's fitting value and the number of fitting days allowed.
- 3 Check special items**

Check quantities and specifications for K-Push, cutlery inserts, metal frames, lighting parts, bins, appliances and other accessories. Make sure items shown on the plans are included in the invoicing instructions.
- 4 Confirm the drawing revision**

Check that the factory and installation team have the same latest approved plans. All approved corrections and client changes must be shown. Resolve conflicting drawings before the affected work proceeds.
- 5 Read every drawing**

Check sizes, joins, fillers, scribes, end panels, appliance spaces, clearances, connections and installation sequence. Identify anything that may not fit or may clash with the building or another trade.
- 6 Resolve unclear details**

Take the marked plans to the designer or consultant responsible for the job. Understand the answer before explaining it to the fitter. Keep the agreed correction or instruction with the job information.
- 7 Choose the right fitter**

Assess the difficulty, size and finish of each area. Match demanding work to experienced fitters. Do not give complex work to a new or junior fitter without suitable supervision. Arrange allocation and booking with Tashiana.
- 8 Plan the fitting allowance**

Where several fitters are used, separate the areas, fitting values and allowed days. Keep one or two days within the allowance, depending on the job, for returned parts, adjustments and cleaning. Refer unrealistic allowances to Dane before committing.

3.2 Plan with the client

Contact the client early so the building programme, factory and installation team can work to the same plan.

WHO TO CONTACT

Tashiana for planning, fitter bookings and travel arrangements. Sharm for Richmond production and deliveries; Jody where Mobeni is producing the job.

1 Introduce yourself

Call the client, explain that you are managing delivery and installation, and give your contact details. Explain when they should contact you.

2 Explain the programme

Discuss the estimated delivery period, fitting days and installation sequence. Explain that final dates depend on factory completion, site readiness and the required payment confirmation.

3 Agree the order of work

Ask whether any rooms must be completed first for flooring, wallpaper, plumbing or other contractors. Keep a note of the agreed sequence and explain it to the fitter.

4 Prioritise worktop areas

If there is no special priority, start with areas needing worktop measurement. This gives TGS time to measure, manufacture and install while fitting continues elsewhere.

5 Follow building progress

Ask what stage the building work has reached and when each area will be ready. Follow up weekly or every two weeks as appropriate. Tell the client, consultant and relevant factory promptly if the site or production timeline changes.

6 Confirm site access

Check working hours, estate registration, fingerprints, access fees, permits, entry codes, parking, unloading and the largest truck permitted. Check stairs, lifts and the route for large items.

7 Arrange out-of-town requirements

Calculate fuel, tolls, team size, travel dates and accommodation. Arrange approvals, bookings and payments before the team leaves. Tashiana assists with the process.

8 Keep useful site records

Keep dated photos, short videos, marked plans and agreed client instructions together by job and area. Photograph existing damage before work starts. Use a short walkthrough video to show layout, access or a problem that photographs do not explain clearly.

3.3 Carry out the site check

Use the latest factory plans. Physically compare the site with the drawings; do not assume someone else has checked it.

WHO TO CONTACT

Designer or consultant for layout and design decisions. Site foreman or builder for corrections. Ashlen first, then Jody, for senior technical advice; Dane for general assistance.

1 Prepare before leaving

Confirm the job, address, areas to check, site contact and purpose of the visit. Take the latest approved factory plans, appliance details, a tape or laser measure, level, square, marking materials and a charged phone.

2 Walk the site

Identify each room against the plan. Confirm the finished-floor reference and whether flooring, plaster, tiles or ceilings will still change the dimensions. Check access and obvious obstructions.

3 Measure against the plan

Measure the wall runs, openings, heights and relevant depths. Circle dimensions that agree with the plan. Write the actual measurement beside anything different, with its location and units. Do not guess or replace the original dimension without showing the difference.

4 Check level, plumb and square

Use the level and square on floors, walls and corners. Identify the effect on cupboard levels, skirtings, fillers, panels and gaps. The existing TKS guides flag differences over approximately 20-30 mm for attention; this is a warning point, not permission to ignore smaller differences that affect fit.

5 Mark the cupboard layout

Mark cupboard positions, fillers, end panels, appliance spaces and relevant heights where permitted. Check the services against this marked layout, not only against the wall.

6 Check the details on the next page

Work through dimensions, cabinetry, appliances and services for every relevant area. Check both the overall layout and individual units.

7 Deal with discrepancies on site

Take a wide photo showing location and a close-up showing the measurement or clash. Use video where movement or access is the issue. Speak to the consultant and foreman before leaving where possible. Agree what must change, who will do it and when.

8 Recheck before proceeding

Show serious site problems to the client and explain their effect. Confirm whether the builder must correct the site or whether an agreed workable solution is approved. Keep the instruction with the job and recheck corrections. Refer unresolved technical issues to Ashlen, then Jody; do not proceed with affected work on an assumption.

3.4 What to check against the factory plan

Check each relevant item in every room. Mark the drawing and photograph differences so that the required correction is clear.

WHO TO CONTACT

Consultant or designer for specification and layout. Ashlen, then Jody, for technical uncertainty. The responsible site trade for service corrections.

- **Room and building dimensions**

Wall lengths, recesses, ceiling heights, floor levels, wall plumb and corner squareness. Check door and window positions, sill heights, architraves, door swings, columns, beams, bulkheads, skirtings and other obstructions. Allow for finishes still to be installed.

- **Cupboard layout**

Overall runs and individual unit sizes; fillers, scribes, end panels and returns; tall-unit heights; wall-unit positions; kickboards and fascias. Check that the complete arrangement fits, including finishing pieces.

- **Clearances and operation**

Doors and drawers must open without hitting walls, handles, neighbouring units or appliances. Check islands, passages, pull-outs, internal drawers, shelves and corner mechanisms. Check installation access and suitable support/fixing areas.

- **Appliances and buyout items**

Confirm the exact appliance model and its installation details. Check opening width, height and depth, ventilation, door swing, integrated fronts and connections. Check space for bins, accessories and other specified buyout items. Do not rely on a generic appliance size.

- **Plumbing and waste**

Check water feeds, valves, waste pipes, traps and sink positions against the cupboard set-out. Make sure they do not clash with backs, drawers, shelves or appliances and remain accessible after installation.

- **Electrical and LED points**

Check plug points, appliance supplies, switches and LED points against the layout. Check cable routes, drivers and access before panels or fascias close the area. Mark and photograph wrong points; confirm the responsible electrician's correction before fitting.

- **Gas and extraction**

Where applicable, check the specified gas connection position and extractor position, duct route and outlet against the plans and appliance information. Refer service work to the responsible qualified trade.

- **Worktops and readiness**

Check sink and hob locations, cut-outs, supports, worktop thickness and interfaces with cupboards. Confirm that required building work is complete, areas are dry and clear, power is available and goods can be stored safely. Record anything preventing delivery or fitting.

3.5 Prepare for delivery

Carry out the pre-delivery check about two weeks before the proposed delivery date. Confirm the site, factory, team and payment position before promising delivery.

WHO TO CONTACT

Sharm for Richmond; Jody for Mobeni. Pravesh for loading/deliveries. Tashiana for planning. Seema for financial queries and the consultant for contract or allocation discrepancies.

- 1 Check the site physically**
Complete or arrange the site check. Confirm access, clean working areas, storage, plumbing, electrical and LED points. Check that prerequisite work by other trades will be finished. Recheck any earlier corrections.
- 2 Check factory progress**
Confirm production, quality checks and loading against the proposed date. Richmond normally produces Johannesburg jobs, so start with Sharm. Confirm whether any part of the job is being produced by Jody at Mobeni.
- 3 Check the team and resources**
With Tashiana, confirm fitter availability, fitting days, transport, tools and any fuel/accommodation requirements. Make sure the installation sequence is achievable with the goods expected.
- 4 Check the account**
Obtain the updated statement and compare it with the contract and payment terms. Ask the consultant to clarify incorrect values, extras or allocation queries. Obtain confirmation from accounts/the authorised person that delivery may proceed; a client saying payment was made is not enough.
- 5 Confirm the agreed dates**
Once the factory, site, team and account are ready, confirm delivery and installation dates with the client. Arrange the written delivery confirmation with Danielle. Include the expected process and access requirements.
- 6 Recheck access before dispatch**
Confirm the receiving person, property access, entry codes, estate approvals, parking and unloading area. Make sure working and storage areas are clean, dry and clear.
- 7 Check loading and arrival**
Coordinate with Pravesh and the relevant factory; use Vince for Johannesburg warehouse/parts issues. Confirm goods are labelled for the correct job and areas. Keep the client, driver and site team informed of timing and delays.
- 8 Check goods on delivery**
Count units and packages and look for missing, incorrect or damaged items. Take photographs before goods are altered or fitted. Note the area, item and quantity, and raise the issue with the relevant contacts promptly. Keep the fitter informed so the sequence can be adjusted.

3.6 Brief the fitter and start correctly

Before cutting, drilling or fixing, the fitter must understand the job and check both the site and the goods.

WHO TO CONTACT

Tashiana for booking/allocation. Vince for JHB warehouse parts. Norman for stores/components. Consultant for design queries; Ashlen, then Jody, for senior technical advice.

- 1 Brief the fitter before the team leaves**

Confirm the correct site, client contact, access arrangements, latest plans, areas to work on and the order of work. Explain the allowed fitting days, expected progress, special details and known outstanding items.
- 2 Confirm what is needed that day**

Check the right parts, hardware, tools and any return items are available. Make sure the fitter understands other-trade dependencies and client requirements. Resolve unclear instructions before sending the team.
- 3 Walk through a new job together**

At the start of the installation, explain the layout and complex details using the drawings. Ask the fitter to point out anything unclear. Confirm the sequence, particularly areas needed for TGS measurement.
- 4 Count and inspect before fitting**

The fitter must count cupboards, panels, hardware and loose parts against the plans and delivery information. Check sizes, finishes and damage. Photograph shortages and incorrect goods before altering or installing them.
- 5 Recheck services and levels**

Check plumbing, electrical and LED points again. Use a level and square on floors, walls and corners. Conditions may have changed since the site check. Show any serious difference to the client and obtain the required decision before proceeding.
- 6 Protect the site**

Photograph existing damage and the condition of the work areas. Confirm where goods can be stored and how floors, walls and existing finishes will be protected. Keep goods dry and away from other trades' work.
- 7 Check the first fitted area**

Check set-out, level, plumb, alignment, fillers and the interpretation of difficult details before the fitter repeats them elsewhere. Correct a misunderstanding early.
- 8 Do not improvise design changes**

If something does not fit or the plan cannot be followed, pause that part of the work. Speak to the consultant and obtain technical advice where needed. Keep the approved solution with the plan and explain it to the fitter.

3.7 Supervise progress and resolve parts

Stay involved throughout installation. Understand what is being fitted, what is holding up the job and what the fitter needs next.

WHO TO CONTACT

Tashiana for planning. Pravesh and Sharm/Jody for shortages and returns. Vince for JHB warehouse parts; Norman for components. Julie or Vinayshree for buyout orders.

- 1 Check progress each day**

Compare actual work with the areas and fitting days allowed. Review the fitter's photographs and updates; keep them for job and wage information as required by the existing process. If progress is slow, establish the reason before the allowed days are used up.
- 2 Visit when the position is unclear**

Go to site if photos do not explain progress, a technical problem needs inspection or the client has a serious concern. Check workmanship against the plans, including alignment, doors, drawers, hardware, panels and finishing details.
- 3 Keep your own photos and videos**

Take dated overview photos of each area and close-ups of defects, service positions, measurements and completed corrections. Use short videos to demonstrate drawer/door operation, clashes or the route through a room. Keep them by job and area so you can refer back to what you actually saw.
- 4 Make shortage information usable**

Keep one clear list of missing, damaged, incorrect or returned items. Include the room, item/plan reference, dimensions where relevant, finish, quantity and a clear photo. Confirm the correct remedy before ordering.
- 5 Follow the correct factory route**

For shortages or returns, check with Pravesh and the manager of the factory responsible: Sharm at Richmond, or Jody at Mobeni. Confirm the item was received, what is being done and when it is expected back. Follow up until it reaches site.
- 6 Check returned items before rebooking**

Physically check quantity, size, finish and condition. Use Vince for parts in the JHB warehouse and Norman for stores/components. Confirm access and have Tashiana book the fitter once the required parts are ready.
- 7 Follow buyout and design items**

Speak to Julie in Mobeni or Vinayshree for bins, appliances and other buyout items. Resolve design questions with the job's consultant. Keep following up no-charge items and consultant queries until they are resolved.
- 8 Protect the remaining fitting days**

Keep the reserved one or two days for return work, final adjustments and cleaning. Raise additional labour, travel, accommodation or requested extras with Dane before committing the company to them.

3.8 Coordinate worktops and finish the installation

Follow the completion steps in the existing TKS guides. Check the actual work with the client and deal clearly with anything still outstanding.

WHO TO CONTACT

Charlene for the TGS measuring schedule. Tashiana for return visits. Consultant for scope queries; Seema/accounts for final payment matters.

1 Get worktop areas ready early

Prioritise areas that require measurement. Confirm base units and supports are level, fixed and in their final positions. Check the relevant sink, hob and appliance information before requesting a measure.

2 Confirm readiness with photographs

Take clear photos showing the complete worktop area and relevant details. Do not request a measurement on the assumption that the fitter will be ready.

3 Coordinate with TGS

Add confirmed ready areas to the measuring schedule sent every Thursday for the following week. Tell Charlene immediately if readiness or access changes.

4 Complete return work

Once outstanding parts are checked and available, arrange the fitter with Tashiana. Use the reserved fitting time for returned parts, adjustments and cleaning. Check the completed work yourself or obtain clear evidence.

5 Inspect the finished areas

Go through the installation against the approved plans. Check alignment, door and drawer operation, hardware, silicone, adjustments and cleaning. Take final photographs and short operation videos where useful.

6 Walk through with the client

Go area by area and demonstrate the important fittings. If any genuine snag remains, identify it clearly with the responsible person and intended date. Put remaining items on the required completion or snag document.

7 Obtain the required sign-off

Ask the client to sign the existing completion or snag documents. If the fitter handled the walkthrough, still call the client personally to confirm satisfaction and discuss any concern.

8 Explain the next step

Tell the client that accounts will contact them about final payment. Keep the signed documents, photos/videos, outstanding-item information and relevant wage records in the job file. Do not agree payment changes without authorisation.

PART 4

Site checks

Separate three checks: measurement before manufacture; readiness before delivery; quality and completion after fitting. Passing one check does not pass the others.

4.1 The site check procedure

- 1

Book and prepare

Log the request with Danielle and Tashiana, and confirm the current booking and allocation arrangement with Dane. Keep snag visits separate from pre-installation site checks.

Obtain job/order number, address, purpose, consultant, site contact, requested date, full factory plans, approved design drawings, revision/date and appliance specifications. If versions disagree, obtain written clarification before releasing affected work.

Take the plan, measuring equipment, level, phone/camera and checklist. Read the complete file before arriving.
- 2

Confirm the site and measure

Identify every room/unit against the plan; walk the site with the client or builder. Confirm finished-floor level and agreed measuring datum.

Measure each relevant dimension independently. Circle dimensions that agree; write the actual measurement alongside any difference. Include units, datum and location. Do not overwrite the original dimension.

Mark cabinet positions, fillers, end panels, tall units, appliance openings and finished heights on site where permitted. Compare all service points to this set-out.
- 3

Resolve discrepancies

Photograph and label each clash. Record plan dimension, actual dimension, effect, required correction and responsible person.

Notify the consultant and site manager/foreman before leaving, or immediately if they are unavailable. Agree the responsible trade and target date; escalate unresolved technical decisions to Dane or the other installation manager.

Do not accept "I never mark these" as closure. Record who will mark, move, approve and recheck each service. Do not move electrical, gas or plumbing services yourself unless appropriately authorised and qualified.
- 4

Report and release

Submit the marked plan, checklist, photos and action list to Tashiana/Danielle and the consultant the same day. Record recipients and outstanding decisions.

Recheck corrections, attach evidence and obtain the designated release approval. Record who approved, what scope and which drawing revision. If release authority is unclear, refer to Dane.

Report the result as one of three statuses

GREEN	Checked scope is ready, with no unresolved blocking items.
AMBER	Corrections or a recheck are required. Not permission to manufacture or install the affected work.
RED	The affected work cannot proceed.

TAKE WITH YOU

Latest approved factory plans, appliance details, a tape or laser measure, level, square, marking materials and a charged phone.

4.2 Factory plan and measurement checklist

Use Pass / Fail / Not applicable for each item. Explain Not applicable. Record plan and actual dimensions; use the approved project specification and manufacturer instructions for clearances and tolerances.

JOB FILE AND LAYOUT	
☐	Client, order number, address, room/unit and scope match the job file. Latest approved factory-plan revision/date confirmed.
☐	Design approvals, variations, material/finish schedule, hardware and appliance models match the production file. No conflicting revisions.
☐	Overall room lengths and widths; each wall run; alcoves/recesses; diagonals/squareness; floor-to-ceiling heights at several points.
☐	Wall plumb, corners, floor level/high point and ceiling variation; record deviations and allowance for final floor/wall finishes.
☐	Doors/windows: position, opening size, sill/architrave heights, swing and handle projections. Check beams, columns, bulkheads, skirtings and other obstructions.
CABINET SET OUT AND USABILITY	
☐	Individual units and total runs fit, including fillers, scribes, end/decor panels, returns, kickboards and cornices/fascias.
☐	Cabinet heights/depths, wall-unit heights and tall-unit alignment agree with the finished-floor datum.
☐	Island/peninsula position, overhangs and walkways; doors/drawers can open without clashes with adjacent handles, walls or appliances.
☐	Internal drawers, shelves, pull-outs, bins and corner mechanisms fit and operate; service access remains possible.
☐	Wall construction and fixing/support requirements identified, including hanging units, floating vanities and heavy panels. Obtain technical confirmation where uncertain.
APPLIANCES AND WORKTOPS	
☐	Exact appliance model and installation instructions obtained; opening width/height/depth, ventilation and clearances checked.
☐	Door swings, integrated fronts, hinges, service access and removal route checked for fridge, dishwasher, oven, microwave, hob and laundry appliances.
☐	Sink/hob positions, cut-outs, bowl depth, tap clearance and drawers below agree with approved details.
☐	Worktop thickness, levels, overhangs, supports, joints and splashbacks coordinated with TGS; do not cut or fabricate from an unresolved assumption.
☐	Extractor size, position, duct route, outlet and access confirmed; check manufacturer requirements and avoid clashes with cabinetry.

4.3 Services and site readiness checklist

Incorrect plugs, LED points and pipes have caused delays on TKS installations. Verify their position against the marked cabinet layout, not just against the room wall.

SERVICES AND CONNECTIONS

- ☐ Water feeds, isolators, waste outlets and traps: exact positions/heights and routing; no clashes with backs, shelves, drawers or appliances; access retained.
- ☐ Electrical sockets, appliance supplies, switches and isolators: exact positions/heights; accessible when installed; no concealed unusable outlets.
- ☐ LED supply points, drivers/transformers, channels, cable routes and access: check before closing panels or fitting fascias.
- ☐ Gas point and service route coordinated with approved design and qualified installer; ventilation/clearances checked against appliance requirements.
- ☐ Extractor ducting and outlet route ready; identify who completes each connection. Record specialist-trade completion requirements.
- ☐ Services marked and photographed with measurements from agreed datums; consultant and site representative told of every required move.

BUILDING READINESS

- ☐ Required plaster, screed, tiling, flooring, painting and wet work completed sufficiently for installation; surfaces dry and suitable.
- ☐ Finished levels and dimensions rechecked after building changes. No unresolved leaks, damp, unstable surfaces or unsuitable fixing areas.
- ☐ Rooms clear; protection agreed for floors, walls, stairs and existing finishes; secure dry storage available.
- ☐ Lighting, power and working area available; other trades sequenced so they do not prevent installation or damage fitted work.

DELIVERY AND PROGRAMME READINESS

- ☐ Vehicle access, parking/loading, stairs/lifts, doorway sizes, estate/building permissions and permitted working hours confirmed.
- ☐ Delivery date, receiving person, delivery note and storage arrangements confirmed. Check heavy/large-item handling route and resources.
- ☐ Parts and hardware ready, appliances/specifications available, fitter and fitting days allocated, stone/other-trade dependencies agreed.
- ☐ Consultant/accounts confirms required commercial release; do not assume payment from a message or document title.
- ☐ Record readiness status and specific blocked scope. Recheck changed conditions before delivery/start. An old visit does not establish today's readiness.

4.4 Marking service points

Incorrectly marked plugs, LEDs and pipes have caused relocations and installation delays. Marking and checking service points is the site checker's control.

- Check every service against the marked cabinet layout, not just the wall.
- Agree who marks and who checks each service. Do not accept "I never mark these" as closure.
- Record who will mark, move, approve and recheck each service.

PART 5

Delivery, shortages and quality

The installation manager follows each issue through to an inspected result. An order, dispatch note or planned visit is not completion.

5.1 Before unloading and starting

- Match delivery note to the job, rooms and pack labels. Count packages/components; inspect damage and verify critical/remade parts before committing the team.
- Photograph shortages, damage and incorrect items the same day. Note them on delivery records and send to Tashiana; retain packaging/labels where useful.
- Walk the scope with the lead fitter; confirm protection and datum. Check cabinet set-out and service clashes before fixing, drilling or cutting. Stop the affected scope if a critical mismatch remains.

5.2 Controlling quality as you fit

- Check carcasses for level, plumb, alignment and secure fixing to suitable construction. Check supports and manufacturer fitting instructions.
- Check fillers, scribes, end panels, joints, exposed edges and finish quality. Inspect the first example before repeating a detail.
- Test doors, drawers, hinges, runners, pull-outs and clearances. Confirm handles, accessories, shelves and internal fittings match the approved specification.
- Coordinate LED work before closing panels; protect access to valves, sockets, drivers and appliance maintenance points.
- Before TGS measurement, confirm cabinets are fixed, level and in final position; approved sink/hob details and supports are ready. Send dated readiness photos and obtain TGS acceptance.

5.3 One shortage and remake register

- For each item record: job/order; room/unit; drawing revision and component reference; defect; required dimensions; finish/colour/grain; quantity; handedness; photo; proposed remedy.
- Consultant/authorised approver confirms any scope or specification change. Factory acknowledges the exact request and reference; Tashiana records production and dispatch ETA.
- Track separately: requested > approved > factory acknowledged > dispatched > received and inspected > fitted > verified closed.
- Physically inspect returned parts for size, finish and damage before booking the return visit. Return wrong parts using labelled paperwork and keep evidence.

Fields for each item	Job / order Room / unit Drawing revision and component reference Defect Required dimensions Finish / colour / grain Quantity Handedness Photo Proposed remedy
Stages to track separately	Requested > Approved > Factory acknowledged > Dispatched > Received and inspected > Fitted > Verified closed

5.4 If the plan cannot be followed

RULE

Pause the affected work, make the area safe, record the issue and obtain a written technical/design decision. Confirm cost/date impact with the authorised person, issue the correct revision and brief the fitter. Never conceal a mismatch with an unapproved site alteration.

5.5 When things go wrong

A quick guide, drawn from the rules in this guide.

Situation	What to do
Plug, LED point or pipe is in the wrong place	Mark it, photograph it with measurements, tell the consultant and the responsible trade before leaving. Confirm the correction before fitting. Do not move it yourself.
Goods arrive short, damaged or wrong	Photograph before anything is altered or fitted. Note room, item and quantity. Raise it with Pravesh and the factory manager. Tell the fitter so the sequence can change.
The plan cannot be followed	Pause that part of the work and make the area safe. Get a written technical or design decision. Confirm cost and date impact with the authorised person. Reissue the correct revision and brief the fitter.
Client says they have paid	Not enough. Ask accounts or the authorised person to confirm that delivery may proceed.
Client asks for an extra or a discount	Refer to the consultant. Do not promise anything.
Fitter wants to change the design to make it fit	No. Stop, speak to the consultant, get advice, then explain the approved solution to the fitter.
The site is not ready	Record what is blocking delivery or fitting. Tell the client, consultant and factory promptly. Recheck before you promise a new date.
Client will not sign	Record the reason, contact attempts and remaining disagreement. Escalate unresolved disputes to Dane.

PART 6

Completion and client handover

Treat physical completion, client acceptance and commercial closure as separate steps.

6.1 Inspect before inviting the client to sign

- ☐ Full agreed scope installed; every room checked against the approved plan and variation list.
- ☐ Doors/drawers operate smoothly; gaps/alignment, handles, shelves, mechanisms, panels, fillers and trims checked.
- ☐ Cabinetry secure; surfaces, edges, seals and finishes free of damage; protection/plastic removed where appropriate.
- ☐ Worktop/stone and specialist connections checked with the responsible trades; unresolved dependencies recorded. Do not certify specialist work outside your competence.
- ☐ Rubbish removed; site cleaned; client property protected; spare items and relevant care information handed over.
- ☐ Compare the installation to the shortage/snag register. Photograph every closed item and test operation.

6.2 Walkthrough and snag list

- Walk through with the client/site representative. Record each remaining item by room, photo/reference, remedy, owner and agreed date.
- If only one area is signed off, identify that area explicitly. A guest-vanity sign-off does not close a whole job.
- Do not mark a job fully complete while agreed scope remains. Record conditional acceptance and remaining work accurately; arrange the next visit only after parts/access are confirmed.

6.3 Close the file

- Obtain dated client acceptance for the agreed scope and file it with the final photos, drawings, variations and completed snag list.
- Send the installation close-out position to Tashiana and the consultant. Accounts/consultant confirms balances, approved credits and commercial closure separately.
- If the client does not sign, record the reason, contact attempts, remaining disagreement and next action. Escalate unresolved disputes to Dane.

6.4 What success looks like

- Every allocated job has a clear next action and current programme. Reports reach the office the same day.
- Fitters arrive with the right information and parts. Repeat visits reduce because parts and readiness are checked first.
- Problems are raised early; workmanship is inspected during fitting; sign-off evidence is filed.
- Dane reviews quality, delays, fitting days, repeat defects and client feedback with the installation manager.

PART 7

People and contacts

Start with the person responsible for the issue. Richmond normally produces Johannesburg work; check whether a particular job or item is being produced at Mobeni.

7.1 Who to contact for what

What you need	Who to contact	Responsibility
Design, plans or specification	The job's designer or consultant	Resolve layout, scope, drawing and specification queries.
JHB warehouse or parts	Vince	Warehouse and parts in Johannesburg.
JHB stores or components	Norman	Stores, hardware and components in Johannesburg.
Administration	Danielle	Production file, documents and administrative assistance.
Maintenance, planning or fitter booking	Tashiana	Maintenance coordination, planning and booking fitters.
Senior technical support	Ashlen first, then Jody	Start with Ashlen in Durban; then Jody for further support.
Richmond production and deliveries	Sharm	Richmond normally produces Johannesburg jobs.
Mobeni or other production issues	Jody	Runs the Mobeni factory; contact him where Mobeni produces the work.
Truck loading and deliveries	Pravesh	Loading and delivery coordination.
Shortages and returned items	Pravesh, plus Sharm or Jody	Follow up with Pravesh and the manager of the responsible factory.
Buyout items and ordering	Julie in Mobeni, or Vinayshree	Bins, appliances and other purchased items.
TGS measurement coordination	Charlene	Thursday schedule for the following week; tell her about readiness or access changes.
HR, finance or salary	Seema	HR, financial and salary-related matters.
Managing Director	Vinesh	Managing Director.
General Johannesburg contact	Dane	General assistance and decisions that need management input.

WHEN YOU ASK FOR HELP

When you ask for help, give the job or client, the area, the plan or item reference, photos or video, and the specific question. Keep Vinayshree (buyout ordering) separate from Vinesh (Managing Director).

7.2 People directory

Name	Role	Go to them for	Phone / email
Dane	Job allocation, escalations and priorities	Any approval outside your authority; general assistance in Johannesburg.	
Rodney	Peer installation manager	Technical handover and shared-resource coordination.	
Tashiana	Programme, maintenance and planning	Booking fitters, programme, shortage and remake tracking, client and admin follow-ups, records, factory contact directory.	
Danielle	Administration	Production files, job packs, document control, delivery and admin support, visit logging.	
Vince	Johannesburg warehouse	Warehouse picking, loading coordination, parts and records.	
Norman	Johannesburg stores	Stores, hardware and components.	
Sharm	Runs the Richmond factory	Richmond production and deliveries (Richmond normally produces Johannesburg jobs).	
Jody	Runs the Mobeni factory	Jobs produced at Mobeni; senior technical support after Ashlen.	
Ashlen	Durban; senior technical support	First stop for technical uncertainty you cannot resolve with the consultant.	
Pravesh	Loading and deliveries	Truck loading, delivery coordination, shortages and returns.	
Charlene	TGS measuring schedule	Worktop measuring; the Thursday schedule for the following week.	
Julie / Vinayshree	Buyout ordering (Julie in Mobeni)	Bins, appliances and other purchased items.	
Seema	HR and finance	Salary, HR and financial queries.	
Vinesh	Managing Director	Through Dane.	

Consultants

Amith, Ravin, Conrad, Anita, Sonia and Hamesh (Dane also acts as consultant on some jobs). Each has a Quick Control and Job Detail sheet.

7.3 Escalation

Step	Who	When
1	The person responsible for the issue	Use the contacts table. Include job, area, reference, photos and the specific question.
2	Technical: consultant, then Ashlen, then Jody. Management: Rodney or Dane.	Technical issues you cannot resolve; decisions outside your authority.

Step	Who	When
3	Dane	Unresolved disputes, unrealistic allowances, extra labour or cost, unclear release authority, anything affecting the client relationship.
Money or HR	Seema	Salary, HR and financial queries.

PART 8

Systems, files and records

Where the live information sits, and what belongs in every job file.

8.1 The trackers

Sheet	What it is
Master Task Sheet	Dane's master list of tasks. A new dated file is created periodically, so check for a newer version each time. https://docs.google.com/spreadsheets/d/1wijaxFhiQMMZ_wT5TECF_6t4fpSgXrUlqxmuFdGV1bl/edit
TKS New Installation Planner	The live installation board, managed by Jody, Ashlen and Tashiana. Per job: planned date, install area, consultant, site address, installer or team, install type, days, parts status, dispatch date from factory, delivery date to site, install status and notes. Truck and delivery tracking is in the Dispatch Date from Factory and Delivery Date to Site columns. There is no separate truck sheet. https://docs.google.com/spreadsheets/d/1qd8EO0IQW8RNWWEOQ-ZBC2qQn0DX0tmVyNGBPU5n3Eo/edit
TKS JHB Installations: Quick Control	Debtors and ongoing work: about 136 jobs by status (blocked, close-out, work remaining, check status), owner and amount owed. Each consultant also has a Quick Control and Job Detail sheet in the same folder. https://docs.google.com/spreadsheets/d/1dFaFkp2wa2X85mlBYHiodpYaw-9y_VVDrtPzrNBg4Y8/edit

8.2 What goes in the job file

- Client name, contact details and site address
- Signed contract and invoicing instructions
- Latest approved factory plans and design drawings, with revision and date
- Approved variations and client instructions
- Marked-up plans from every site check
- Site visit records, dated photos and short videos, by job and area
- Shortage and remake register, delivery notes and delivery photos
- Daily reports and the action list
- Snag list, signed completion or snag documents and client acceptance
- Relevant wage records for the job

8.3 Photos and video

- Name files: job number, client, area, date, then a number (for example 4521_Smith_Kitchen_2026-10-22_03).
- Take a wide photo to show location, then a close-up to show the measurement or clash.
- Photograph existing damage before any work starts.
- Use a short walkthrough video where a photo cannot explain layout, access or movement.
- Keep photos with the job in the job file, not only on your phone.

8.4 Working safely

- Fitters and installers do not make live electrical, gas or plumbing connections. Qualified trades do.

- Check for hidden pipes and cables before drilling into walls, especially around service points.
- Wear the protection the site and the task require. Follow estate and building rules.
- Heavy panels and stone need enough people and the right handling equipment. Plan the route first.
- Use stable steps for work at height. Control dust when cutting.
- Report injuries, damage and near misses to Dane the same day.

PART 9

Taking over an existing job

Use this whenever a job is transferred to you part-way through.

9.1 The rules

- Each job has one accountable installation manager. A consultant, fitter or admin name is not proof of technical ownership.
- Dane and the other installation manager agree who is accountable. Tashiana keeps admin coordination.
- Where more than one manager's name appears on a job, resolve the conflict before the job is transferred.
- Once a job is yours, check the technical position, the parts and the next visit. Commercial-only matters stay with the consultant and accounts. You help with technical evidence when needed.
- Visits and promises made in the past need confirmation. Do not treat them as completed.
- Amounts quoted in old status notes are unverified until accounts confirm them.
- Keep jobs with similar client names separate. Confirm identity by order number before you act.

9.2 Takeover checklist

- ☐ Correct client, order, site and consultant identified. Similar names kept separate.
- ☐ Outgoing manager or admin briefs actual work, outstanding scope and previous client promises.
- ☐ Latest plans, variations, photos, snag list, factory orders, delivery notes and prior sign-offs handed over.
- ☐ Parts physically located. Remakes, specifications and confirmed ETAs checked. Access and other-trade dependencies verified.
- ☐ Site condition checked or visit arranged. Existing complaint or urgent risk escalated.
- ☐ Dane and the other installation manager confirm the allocation. Record the accountable installation manager, admin coordinator, fitter and consultant separately.
- ☐ Next action, owner and date agreed. Client and consultant told who the working contact is.

Transfer date	
From	
To	
Approved by	

APPENDICES

Forms, templates and glossary

Forms to copy and use, wording to adapt, and plain-language meanings.

A1 Site visit record

One record per visit. Purpose is one of: measurement, readiness, progress, snag or completion. Attach the checklist (Part 4), the marked-up plan and numbered photos.

Job / order	
Client	
Address / room / unit	
Date and time	
Checker	
Purpose of visit	
Consultant	
Site contact	
Factory plan revision and date	
Design revision	
Finished-floor datum and units used	

Measurement and issue log

Location / component	Plan	Actual	Pass / fail / N/A	Photo	Action	Owner	Target date
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Visit outcome

Status (GREEN, AMBER or RED)	
Scope checked	
Affected work on hold	
Who was told, and when	
Required approval or decision	
Recheck date and person	
Attachments (plan, checklist, photos, actions)	
Report sent to, and date	
Release approved by, date, scope	

A2 Morning briefing record

Use with fitters each morning.

Date	
Job / order	
Lead fitter	
Team, vehicle and site contact	
Plan revision	
Today's exact tasks	
Parts physically checked by	
Missing items	
Known risks, stop points, other trades	
Target output, fitting days left	
Next check-in	
Fitter confirms brief	

A3 End-of-day update

Complete before you finish each day.

Completed today	
Still outstanding	
Blocker, action, owner and date	
Photos and records filed	
Tomorrow's plan	
Client and consultant informed	
Decision needed	

B Templates

Wording to adapt.

First call to the client

Hello [name], this is [your name] from The Kitchen Studio. I'm managing the delivery and installation of your [kitchen / cupboards].

You can reach me on [number] for anything about the programme, access or the site.

Our estimate is [delivery period] for delivery and [days] fitting days. Final dates depend on the factory finishing, the site being ready and payment confirmation.

Are there rooms that must be finished first for flooring, painting or other contractors? What stage is the building work at, and when will each area be ready?

I'll need working hours, estate access, parking and unloading details, and the largest truck allowed.

Delivery confirmation to the client (with Danielle)

Delivery to [address] is confirmed for [date], between [time] and [time].

Please have [name] there to receive the goods. The area must be clear, clean and dry with working power and lighting.

Access: [estate, entry codes, parking, unloading area].

Fitting starts [date] and is expected to take [days] days.

Shortage or remake request

Job / order: [] Room / unit: []

Drawing revision and component reference: []

Defect or shortage: []

Required dimensions: [] Finish, colour, grain: [] Quantity: [] Handedness: []

Photo attached: [] Proposed remedy: []

Approved by: [consultant or authorised approver]

C Glossary

Term	Meaning
Datum	The agreed reference point or line that all measurements are taken from.
Finished-floor level	The height of the floor after flooring is laid. Measure from this, not the bare slab.
Filler / scribe	Pieces that close a gap between cupboards and a wall or ceiling. A scribe is cut to follow an uneven surface.
End panel / return	Panels that finish the exposed side or end of a run of cupboards.
Kickboard / fascia / cornice	Trim pieces at the base, front and top of cupboards.
Plumb / square	Plumb means truly vertical. Square means corners are truly 90 degrees.
Handedness	Which way a door, hinge or appliance opens.
Buyout items	Bins, appliances and other items bought in rather than made in the factory.
Shortage / remake	A missing, damaged or wrong part, and the replacement that is made for it.
Snag	A remaining defect or unfinished item recorded at a walkthrough.
TGS	Worktop measuring, manufacture and installation. Scheduled through Charlene.
Quick Control	The sheet of debtors and ongoing jobs, with status, owner and amount owed.
POP	Proof of payment.
JHB	Johannesburg.
Richmond / Mobeni	TKS factories. Richmond (Sharm) normally produces Johannesburg jobs. Mobeni (Jody) produces some.
Midrand	The Johannesburg base. The distance from Midrand is checked for every job.