

Preparing a Scope of Work

The scope of work is a statement that includes what your system includes. Preparing a scope of work will allow you to understand what needs to be done and what will be required, and it is what will give you confidence to know your project before you have to present it to your customer. Lastly, a clear scope of work will allow you or your engineering team to provide the best design. In order to prepare the scope of work, answer the following questions.

- 1 Building:** Your building can either be new, existing, an expansion, or a renovation. The following questions should be asked, as applicable:

- Is this a NEW or EXISTING building?
- Is this an expansion to the building?
- Is this a stand-alone building?
- Is this a tenant space inside a mall?
- Is this a multi-story building?
- Is this a building complex?

- 2 System:** The following are some of the most common options:

FA System Upgrade	System completely redesigned to meet latest applicable code requirements. FACP replaced, initiating and notification devices upgraded.
Full FA System Replacement	Old FACP and old devices being replaced only; no upgrade.
Partial Replacement	Existing system with only some initiating or some notification devices partially replaced, or both.
Same FACP Replacement	FACP being replaced by a new identical one with identical part number.
CO Detection Upgrade	CO detection upgrade required by AHJ.

Consulting with Your Company's Resources

Secure success by remaining in touch with your own internal team.

- 1 Consult with your sales leader to discuss the best path in order to gain approval of your recommendation.
- 2 For smaller projects, minimal initial Senior Engineering involvement is needed.
- 3 For larger projects, immediate Engineering involvement is needed. The engineer will take all the valuable information that you gathered and prepare a recommendation.
- 4 Advise leadership of intended recommendation type: Direct Sale, Security Plus, Third Party Leasing, etc. Some of these strategies depend upon what need is driving the opportunity.

Consulting with AHJ

This is a critical step in determining the scope of your recommendation. Timely engaging with the AHJ will save you time and money.

- 1 You must engage with the AHJ, Fire Sub-Code, or Building Sub-Code official to determine the deliverables, such as drawings, cost of permit applications, and inspections.
- 2 Make sure to get a name, phone number, and an email address for future reference.
- 3 By making this personal contact you establish a valuable rapport and open up a channel of communication.

Wrapping it up

By now, you should have completed the [FA Sales Rep Questionnaire](#), performed a [building survey](#), obtained the [drawing files](#), and put together the [scope of work](#). You should have a [bill of materials](#) from your team and valuable feedback from the AHJ. The following is your checklist to make sure you have everything ready to send to HELPGATE.

- 1 Sales Rep Questionnaire filled out
- 2 Completed markups that follow instructions from the survey guide
- 3 Floor plans in .dwg or .pdf. If you don't have the .dwg files, make sure to arrange for that with your customer as soon as possible.
- 4 Bill of materials with quantities, part numbers, and description

Do you have all the above items?

It's time to send it to HELPGATE to get your quote right away!

Email us at:
sales@helpgate-inc.com

