

FREE PRODUCT SAMPLE

See exactly how the contractor playbook works

Eight real preview pages: package contents, the complete template index, a contractor scenario, a usable worksheet, a filled example, and a 30-day rollout.

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Sample examples only - not legal, safety, insurance, or contract advice

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What the complete package contains

Component	Included in the paid package
Core playbook	13-page operating framework covering authority, risk, continuity, incidents, records, staffing, leadership, and review.
Contractor companion	Construction-specific examples for owner, PM, superintendent, field, vendor, and office continuity.
Editable files	28 Word templates with internal-use rights for one licensed organization.
Implementation option	The higher tier adds a 60-minute remote setup session, one customized Decision Authority Matrix, and one revision. Schedule within 60 days.

The paid files are editable. This sample is intentionally read-only and includes one complete worksheet you can test before buying.

Who it is for

- Owner-led general and specialty contractors with a small office and field leadership team.
- Companies where one owner, PM, superintendent, estimator, or office manager holds critical knowledge.
- Teams that need clear approval limits and handoffs without building a corporate continuity department.

All 28 editable templates

Start here

- 0.1 30-60-90-Day Deployment Roadmap
- 0.2 Internal Owner Assignment Sheet
- 0.3 Version Control and Update Log

Incident response

- 4.1 Incident Report Form
- 4.2 Incident Response Timeline Checklist
- 4.3 Internal Communication Scripts
- 4.4 External Stakeholder Communication Templates
- 4.5 After-Action Review Template

Decision authority

- 1.1 Decision Authority Matrix
- 1.2 Role Escalation Flowchart
- 1.3 Emergency Delegation Declaration

Record control

- 5.1 Record Retention Schedule
- 5.2 Documentation Standards Guide
- 5.3 Audit Readiness Checklist

Risk and impact

- 2.1 Organizational Risk Assessment Worksheet
- 2.2 Business Impact Analysis Template
- 2.3 Critical Function Prioritization Matrix
- 2.4 Risk Mitigation Action Tracker

Knowledge and staffing

- 6.1 Training Matrix
- 6.2 Knowledge Transfer Worksheet
- 6.3 Offboarding Continuity Checklist

Continuity planning

- 3.1 Business Continuity Plan
- 3.2 Staffing Contingency Worksheet
- 3.3 Facility Disruption Checklist
- 3.4 Vendor Failure Response Plan

Leadership continuity

- 7.1 Temporary Authority Declaration
- 7.2 Leadership Absence Plan
- 7.3 Succession Continuity Checklist

The kind of failure this solves

Your superintendent quits Tuesday morning. The concrete crew is booked for Thursday. A \$7,500 change order is waiting. An inspection must be scheduled. The project manager is on another job.

Without written authority

- The field waits for the owner to answer.
- The vendor receives conflicting instructions.
- The customer hears a schedule promise nobody recorded.
- The handoff becomes a search through texts, notebooks, and one employee's laptop.

With the playbook

- The interim field lead is already named.
- Approval limits and escalation triggers are written.
- The handoff list identifies the schedule, inspections, submittals, RFIs, open decisions, and customer commitments.
- The PM can record the decision and keep the job moving without inventing authority.

The objective is not to remove the owner. It is to keep normal work from stopping while the owner handles the decisions that truly require owner authority.

Complete worksheet: contractor decision authority

Fill this out for your real company. Add rows for any decision that regularly creates delay or confusion.

Decision	Primary	Backup	Escalate to	Limit / condition	Record required
Change order approval					
Emergency equipment rental					
Vendor or material substitution					
Stop work for safety					
Customer schedule commitment					
Release material					
Staffing or overtime decision					
Other: _____					

Approval

Approved by: _____ Title: _____

Effective date: _____ Next review: _____

Emergency rule: life-safety and property-protection actions follow the company's approved emergency and safety procedures. Record any emergency decision as soon as conditions allow.

Filled example: a small contractor

Sample roles and limits only. They are not recommendations for your company.

Decision	Primary	Backup	Escalate to	Limit or condition
Change order approval	Superintendent	Project manager	Owner	Up to \$10,000 and within approved scope
Emergency equipment rental	Superintendent	Project manager	Owner	Up to \$2,500 to prevent schedule loss
Vendor substitution	Project manager	Superintendent	Owner	Meets specification; notify customer before installation
Stop work for safety	Any supervisor	Project manager	Owner	Immediate authority; document conditions before restart
Customer schedule commitment	Project manager	Owner	Owner	Update master schedule within 24 hours

Questions the owner must answer

- Does contract language require written customer approval before the decision?
- Does the dollar limit apply per event, per project, per day, or in total?
- What evidence must be attached: quote, photo, email, daily log, ticket, or change request?
- When does a safety, schedule, reputation, insurance, or legal issue override the normal dollar limit?

A practical first 30 days

Week	Finish	Test
1	Assign the document owner and backup. List the five roles whose absence would create the most delay.	Have the backup locate the current files without help.
2	Complete the Decision Authority Matrix and Leadership Absence Plan for the owner, PM, and superintendent.	Run a 30-minute owner-unreachable scenario.
3	Complete the critical-function list and identify required records, access, vendors, and backups.	Ask another manager to explain how payroll, inspections, and customer updates continue.
4	Correct gaps, record approvals, communicate limits, and schedule the next review.	Confirm every named backup accepted the assignment.

If the exercise exposes missing access, conflicting authority, or an undocumented commitment, the test worked. Fix the gap before the next real absence.

Who built it

Dean Russell is a U.S. Navy veteran, MBA, operations leader, and systems builder. His background includes leading teams, documenting repeatable processes, training employees, and building practical tools for small organizations.

Ops Control System applies that background to common owner-led contractor problems: approval limits, leadership absence, field and office handoffs, vendor failure, incidents, records, training, offboarding, and succession. It does not claim trade-specific field credentials that Dean does not hold.

Choose the right level

Self-guided - \$299	Implementation - \$799
Complete download with the core playbook, contractor companion, internal-use license, and 28 editable Word templates.	Everything in Self-guided, plus one 60-minute remote setup session, one customized Decision Authority Matrix, and one revision. Schedule within 60 days.

Review the full preview and current purchase terms at opscontrolsystem.com

Operational guidance only. Review completed documents against applicable contracts, laws, safety procedures, insurance requirements, and qualified professional advice.