Welding & Fabrication SOP Pack — Free Sample

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SOP 01 — Customer enquiry and site visit

Purpose: To handle every new enquiry the same way, so no job is promised before Northgate Welding & Fabrication knows what it involves, and no customer is left waiting for an answer. **Scope:** Covers all new enquiries by phone, email, text or walk-in, for gates, railings, stairs, repairs and custom steelwork, from first contact to the site visit notes. Pricing is SOP 02. **Who does it:** The owner takes enquiries and does site visits. If the owner is out, the lead welder takes the details and passes them on the same day.

Steps

1. Answer the same day, or first thing the next working morning. Take the customer's name, phone, address, what they want, its rough size, where it goes, and when they need it.
2. Ask what the steelwork is for. A driveway gate, a balcony railing and a trailer frame repair are different jobs, with different fixings and safety rules.
3. Ask about access. Can a truck and trailer get in? Note steps, slopes, narrow gates or parked cars that will make delivery hard.
4. Ask for drawings or photos, or an old gate to copy. Ask the customer to send photos by text or email, and save them with the enquiry.
5. Book a site visit within three working days for any job over $500, and for any job where measurements matter. For a small repair, a photo and a call may be enough.
6. At the visit, measure twice. Measure the opening top, middle and bottom, because walls and posts are rarely square. Write down the smallest measurement.
7. Check what the new work fixes to. Push on posts and walls, look for cracks, rot or rust, and note if a post needs replacing first.
8. Ask about power, water, gas lines and buried cables where posts will be dug or drilled, and mark them on the sketch.
9. Photograph the site and fixing points. Sketch the job with measurements, and note the customer's choices: style, colour, infill, hinges, latch and lock.
10. Before leaving, agree what happens next. Say when the written quote will arrive, usually within three working days, and leave a card with the shop number.

Quality check: Before leaving, read the measurements back to the customer. Back at the shop, check the form is complete before it goes to estimating. **If it goes wrong:** If a measurement is missed or a fixing point is rotten or loose, call the customer at once, explain what changed, and book a second visit before quoting. Never guess a measurement. **Records:** Keep the enquiry form, sketch, site photos and

customer photos in the job folder, filed under the customer's name and date.

SOP 02 — Estimating and quoting a job

Purpose: To price every job the same way, so Northgate Welding & Fabrication covers its steel, consumables, labour and travel, and the customer gets a clear written quote they can trust. **Scope:** Covers all quotes for gates, railings, stairs, repairs and custom steelwork, from the site visit notes to the written quote. Taking the deposit is SOP 03. **Who does it:** The owner prices every job. The lead welder checks the labour time and cutting list before the quote goes out. Nobody else sends a price to a customer.

Steps

1. Start from the site visit notes and sketch. If a measurement is missing or unclear, go back to the customer or the site. Never price from a guess.
2. Work out the steel list: every length of tube, flat bar, angle, plate and mesh, with sizes. Add 10 percent for cutting waste, and price at the latest supplier price.
3. Add consumables: welding wire or rods, gas, cutting and grinding discs, drill bits, bolts, hinges, latches, locks, paint and primer. List them — small items add up.
4. Work out labour time honestly. Allow time for cutting, welding, grinding, painting, fitting, loading and travel. If a job took six hours before, do not quote four now.
5. Add outside costs: galvanising, powder coating, a hire truck, or a second person for a heavy lift. Get a real price for these before quoting.
6. Add travel and site time for fitting, including a return trip if the job needs two visits — one to fit posts, one to hang the gate, for example.
7. Add the shop margin on top of costs. Check the total against two or three similar past jobs. If it is far higher or lower, find out why first.
8. Write the quote on shop letterhead: date, customer, a plain description of the work, steel and finish included, total price, tax, price valid 30 days, and deposit needed.
9. State what is not included: building permits, concrete work by others, electrical work, removing an old gate unless agreed, and repainting after customer damage.
10. Send the quote by email or hand it over in person, and note the date sent. Follow up once by phone after five working days. Do not chase a customer more than twice.

Quality check: Before sending, the lead welder reads the quote and steel list together and checks sizes, quantities and labour time make sense. The owner signs every quote. **If it goes wrong:** If steel prices jump or a mistake is found after the quote is sent, tell the customer before work starts and issue a corrected quote in writing. If they already accepted, honour the price unless they agree to a change in writing. **Records:** Keep a copy of every quote, with the steel list and labour workings, in the job folder. Note the date sent, the follow-up call, and whether the customer accepted or declined.