

# Customer Transition Meeting

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| Project: | Date: |
| Location: | Planner/Project Manager: |
| Attendees: |  |

# Overview

Customer Transition Meeting(s) shall be held with the Project Team, Operations staff, building occupants, and other stakeholders that are involve in the day-to-day operations of campus buildings and grounds, prior to substantial completion, to give them time to learn how to properly utilize their new space. Meetings should be held on a regular basis depending on the complexity of the project.

# Process

1. Identify actual Customer Transition date (depending on the project size, approx. 1-6 months before the anticipated date.)
2. Schedule an FMD and Facilities Engineering coordination meeting (approx.1-4 months before the anticipated date.)
   * Develop Customer Transition Meeting Agenda
   * Modify Service Matrix to suit that building/area
   * Identify what training is required for building systems and equipment and who should be included in training. Set up individual training meetings with building operators and Customers as required.
     + Building mechanical systems
     + Specific equipment such as glassware washers, autoclaves, etc.
3. Schedule a follow-up FMD and Facilities Engineering coordination meeting (approx. 1 month before the anticipated date)
   * Confirm Customer Transition Meeting agenda
   * Confirm the updated Service Matrix
   * Identify any other items that should be addressed
4. Schedule the Customer Transition Meeting (approx. 1 month before the anticipated date)
   * Meeting attendees to include:
     + Planner/Project Manager (meeting facilitator)
     + Facilities Engineering
     + Customer Representative (building manager, Business Manager, etc.)
5. Meet with the Customer
6. Follow-up with the Customer approx. 1 month after the Customer Transition Meeting

# Sample Customer Transition Meeting Agenda

1. Introductions
2. Schedule
   * Review pre-established meeting schedule with Customers
3. Building Operations
   * Custodial
     + Contacts
     + What to expect
     + Frequency
     + Custodial Supplies
   * Engineering – describe how building systems will be supported by Facilities Engineering
     + Contacts
     + Description of building systems
       1. HVAC
       2. Plumbing
       3. Specialty such as purified water, piped laboratory gases, HEPA systems, etc.
     + Who oversees systems adjustment and maintenance
     + Frequency of anticipated maintenance
   * Support Services - hold an orientation on FISC and Service Now (Regina Sykes)
   * EH&S
     + Contacts
     + What is required from EH&S to open a space utilizing chemicals, biohazards, and radioactive materials
   * Protective Services
     + Contacts
     + Provide Protective Services with a list of people working in the space
     + Description of security for new space
4. Future Meetings Required