

# 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