

Are you equipped to face a claim or dispute?



Projects have entered an era of claims and disputes. Where these were not such common occurrences, they are now almost expected during or after any project.

While forensic claims experts and specialists are dominating the terrain, ready to prove or disprove any claim, companies are trying to figure out how to stay afloat through all this and to get the remuneration they signed up for.

There are way more to claims and disputes than a simple checklist, but this checklist: “Be Equipped to Face a Claim/Dispute”, is a start for companies, and/or professionals in the industry, to see how prepared they are and what to have in place should their project join the statistics and land in a claim situation.

This checklist was compiled by [Profactaplan](#), where people have a passion for the project controls industry. Our vision is to see projects succeed and companies thrive, so we made this list to help YOU.

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Checklist: Be Equipped to Face a Claim/Dispute



SCHEDULE SPECIFIC

- ☐ Project milestones identify all project deliverables.
- ☐ Start and Finish milestones are constrained/logically linked to enable critical path calculations
- ☐ All project activities contain a verb.
- ☐ All activities are logically linked on BOTH ends. No open ends except Start and Finish milestones.
- ☐ Actuals do not extend beyond the update date and no forecasted dates are found before the update date.
- ☐ No constraints used to mitigate why activities cannot complete as indicated by activity logic. (All activities' forecast dates driven by logic.)
- ☐ Ensured that schedules are timeously submitted.
- ☐ The project schedule is resource loaded.

UPDATING

- ☐ Contemporaneous documents to support progress captured in the schedule (weighted unit measure, update metric, site walk downs, tracker, etc.).
- ☐ Milestone actuals are updated.
- ☐ Updates are reviewed by the team before being officially submitted.

REPORTING

- ☐ Aim for S-curves drawn up based on labour units from a fully resource loaded schedule. If fully resource loaded schedule not available, activity weighting is used to achieve a more accurate S-curve than just applying a flat unit per activity.

MANAGEMENT

- ☐ Daily diaries are linked to the individual activities in your schedule
- ☐ Daily diaries are timeously submitted and SIGNED OFF.
- ☐ All site instructions are followed up in writing and signed by the client.
- ☐ The team only executes the verbal instruction once it is confirmed in writing.
- ☐ A site instruction book is being used by the team.
- ☐ Variation orders are submitted to the client and meetings are held to review it and sign off on the conclusion.
- ☐ All notices accompany estimated time and cost impacts as proven by the schedule.
- ☐ Delays experienced are built into the schedule and timeously submitted to the client.
- ☐ A minimum of weekly meetings are held with the project execution team to discuss, document and manage constraints and risks.
- ☐ The execution team follows the plan, and we can prove it.

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