

# Download these nine great shop management forms

**SC** [signcraft.com/online-exclusives/2021/03/tom-marsh-shop-forms](https://signcraft.com/online-exclusives/2021/03/tom-marsh-shop-forms)

By **SignCraft.com**

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Most sign shops handle a large variety of sign projects and almost all of them are made specifically to meet a customer's needs. That adds up to a lot of details to keep track of. A missed measurement here, a forgotten color change there, and you find yourself doing jobs over—and losing time and money.

Tom Marsh's busy five-person shop, Brushstrokes Signs & Awnings, in Salmon Arm, BC, Canada, handles everything from embroidered sportswear to commercial signs to illuminated signs and service. Years ago he began relying on a handful of shop forms to collect the critical information and speed production.

"It's hard to keep track of all the information that goes into a sign," says Tom, "even on a simple sign sometimes. A customer may call with a change in the middle of production. One of us may have information about a job in our heads but not pass it along to the person who is working on the sign. Doing a job over is frustrating and costs you money.

"A good example of this is when a customer looks at a drawing and likes it, but says they want one line of copy changed from gray to green. If that doesn't get noted on the work order, you'll be doing that print over."

You'll find each of Tom's forms below and you can [download all nine forms here](#). You can adapt them to your needs and help refine your own system so that work goes through your shop more smoothly. You can also get a closer look at Tom's well-organized shop in this article: [A professional, well-organized shop pays off](#).

Tracking the cost of time and materials is essential if you want to price your work accurately. With routine digital prints or truck lettering jobs, it's a little easier to know roughly how much time and material go to them. But it gets harder to estimate how much will go into a custom sign project that is a little more complex.

"I'd imagine most people are like me," says Tom, "in that I tend to estimate things in my head. But that's probably because I have kept track of our costs on a lot of jobs and have learned how much can go in a custom sign. It's easy to overlook things if you don't keep track of them on paper."

With five people on the staff, communication about the projects that are underway is very important. Tom has found that the forms simplify this by giving everyone a place to note certain information or to go to if they need that information.

All of the important information about each job goes on the work order form. That minimizes questions during production and minimizes errors. It's also used to create the invoice, then it's filed for future reference. Tom has a lot of repeat customers, so it's important to be able to get information about colors and digital files used easily.

Another important form is for jobs that originate without a work order. If a customer calls when Tom or Jodie are not available, another staff member can get the details about the job and even get to work on it without waiting for a work order to be created. Tom says this helps because they have a lot of repeat customers.

"If someone on the staff takes a call from a past customer who says they need two more of the A-frame signs we did for them," says Tom, "it gets logged on this form and the job can get underway. Then it comes back to the office so we can record the details on a work order and do an invoice."

There's also a checklist of what needs to be taken to the job site for installation. If someone arrives on site only to realize that they forgot a level or fasteners, it means another trip back to the shop or else having someone run it to them. Tom says this checklist has saved them a lot of time.

"If you're going out of town to install a billboard," he says, "the last thing you want to do is discover you forgot a few important things. The checklist helps people think through what they will need when they get on site and make sure it all comes along with them. On the billing side, this materials form helps us to make sure we don't miss the cost that needs factored into the job."

The job site survey form helps make sure that all the necessary information about a new job is gathered on the first trip. The Time/Materials tracker records all the time and materials used on the job, which is essential insight for future estimates.

Since the shop is in a small town, sign supplies must be shipped in or delivered from suppliers in Vancouver. Tom put together a checklist of what needs ordered. Everyone adds materials to this list as they run low and Tom orders them once each week.

“It’s not a perfect system,” says Tom. “We’re all human and we forget, or we get busy and the filing gets ahead of us. But it works most of the time and it helps smooth out the whole operation, from taking the order through production and billing. Ideally we should eventually scan everything in and do our filing on the computer.

“We’re always looking for ways to make things more efficient. Lately we had a couple of meetings about getting phone messages to the right person. When you’re busy and you get a call it’s easy to say you’ll remember to pass the message along to someone, but then you get distracted and forget. Things fall through the cracks.

“Our daughter is working with us now and has introduced us to an app called Slack, which is an in-house messaging system. It lets you dash off a message to someone immediately without trying to remember to do it when you see them. We’re looking into that right now. There’s always something we could do better.”

Depending on the size of your staff and the type of work you do, you may not need the same forms as they do at Brushstrokes Signs. But even if you work alone, storing important details about a project is risky business and is also a distraction from the things you should really be attending to. Once the details are on paper (or in the computer) you’re free to focus on sales, design and production with a clear head.





them create a record of the job and get it into production. The information will later be transferred to the work order and invoice.

<b>CUSTOMER:</b>																									
<b>CONTACT:</b>																									
<b>PHONE:</b>																									
<b>DATE:</b>																									
<b>SITE ADDRESS:</b>																									
<b>WORK ORDER #</b> _____																									
 <b>DESCRIPTION:</b>																									
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<b>OTHER:</b>																									
 <b>EQUIPMENT REQUIRED</b>																									
 <b>ACCESS TO SITE</b>																									
<b>OTHER</b>																									

[illegible]

**Job Time/Material Tracker:** The only way to know if a job was priced accurately is to track the time and materials used to produce it. This form gathers all that information in one place.

[illegible]



Materials to order: Being in a small town, Tom has to order almost all his sign supplies from suppliers in Vancouver, which is almost a day's drive away. Everyone adds to this list as materials run low.



CUSTOMER: \_\_\_\_\_ DATE: \_\_\_\_\_  
 CONTACT: \_\_\_\_\_ PHONE: \_\_\_\_\_  
 COMPLETION DATE \_\_\_\_\_

**MATERIALS**

	QTY	SIZE	DESCRIPTION

**LABOUR DESCRIPTION:**

DATE:	TYPE	DESCRIPTION	TRUCK:	HOURS:	INITIALS

**SUB CONTRACTOR / RENTAL EQUIPMENT OR TOOLS**

DATE:	DESCRIPTION	INVOICE ATTACHED:	INITIALS

Job Tracker: This form is used in the shop to track time and materials cost while the sign is in production. The information is later transferred to the work order.



Ph. 250-832-7714  
Toll Free 1-877-250-8080  
441B 7th St. S.W.  
PO Box 565  
Salmon Arm, B.C. V1E-4N7

**CUSTOMER:** \_\_\_\_\_ **WO #** \_\_\_\_\_

**PHONE:** \_\_\_\_\_ **DATE:** \_\_\_\_\_

**CONTACT:** \_\_\_\_\_

**SITE ADDRESS:** \_\_\_\_\_

## JOB INSTALLATION REQUIREMENTS

Arrival Time on site \_\_\_\_\_

Permits acquired ?

Safety requirements met ? (cones, barricades) etc.

Job site kept clean and free of hazards to public ?

Job site left clean after install ?

Photos of installation at completion ?

Other

YES	NO
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>

## LARGE EQUIPMENT / LIFTS / RENTAL TOOLS

BACKHOE		TOWABLE		AUGER	
CRANE		GENIE		HILTI	
BOBCAT		SCISSOR		LADDER	
EXCAVATOR		TRAILER		SCAFFOLD	
OTHER					

## SHOP TOOLS / EQUIPMENT

SHOVELS		DRILLS		BROOMS	
RAKES		HAMMERS		RAGS	
TAMP BAR		HEAT GUN		CLEANERS	
LADDERS		SAWS		CONES	
PLANKS		LEVEL		SAFETY	

## MATERIALS / FASTENERS

LUMBER					
4X4		BOLTS		WIRE	
2x6		SCREWS		BALLAST	
2x4				LAMPS	
1x4		HANGERS		ELEC.	
OTHER				TOUCH UP PAINT	

## ADDITIONAL INSTRUCTIONS


Job Installation Requirements: This serves as a checklist for the installers to make sure staff has everything they need when they arrive on site as well as to track costs of any equipment rental.

<p>Ph. 250-832-7714 Toll Free 1-877-250-8080 4418 7th St. S.W. PO Box 565 Salmon Arm, B.C. V1E-4N7</p>	<p><b>CUSTOMER:</b></p> <p><b>PHONE:</b></p> <p><b>CONTACT:</b></p>	<p><b>WO #</b></p> <p><b>DATE:</b></p>
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**SITE ADDRESS:**

<p><b>Arrival on site as promised?</b></p> <p><b>Job site safety observed (cones, barracades) during installation?</b></p> <p><b>Job site clean and free from public hazards during installation?</b></p> <p><b>Was the job site left clean ? ( Site swept, windows cleaned)</b></p> <p><b>Pre approval of any additional work or revisions ?</b></p> <p><b>Were photos taken of completed installation taken ?</b></p>	<p><u>TIME</u> _____</p>	<p><b>YES</b></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p>	<p><b>NO</b></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p>
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**ADDITIONAL LABOUR / MATERIALS**

QTY:	SIZE:	MATERIAL USED:
<p><b>DESCRIPTION:</b></p>		

**All work completed and approved**

**Signature** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Print name:** \_\_\_\_\_


Job Site Installation Report: This form records the details of the installation and any additional material and labor that was required. It also confirms safety measures and cleanup.

CUSTOMER:				DATE:			
SITE ADDRESS:							
CONTACT:				PHONE:			

FACIA	POLE	1 SIDE	2 SIDES	OTHER
BACKLIT	NEON	LED	UNKWOWN	OTHER
MEASUREMENTS:	HEIGHT:	LENGTH:	DEPTH:	OTHER:
	1			
	2			
	3			
POLE				
BASE PLATE				
PHOTOS ( TAKE PHOTOS )		EQUIPMENT REQUIRED		
ACCESS TO SITE		OTHER		



CUSTOMER:	DATE:
SITE ADDRESS:	
CONTACT:	PHONE:

ILLUMINATED SIGN SURVEY					
FACIA	POLE	1 SIDE	2 SIDES	OTHER	
BACKLIT	NEON	LED	UNKWOWN	OTHER	
MEASUREMENTS:	HEIGHT:	LENGTH:	DEPTH:	OTHER:	
	1				
	2				
	3				
POLE					
BASE PLATE					
PHOTOS ( TAKE PHOTOS )		EQUIPMENT REQUIRED			
ACCESS TO SITE		OTHER			

Illuminated Sign Survey: This form is used to collect the information on an illuminated sign that requires service. Tom's son, takes this with him for evening drives where he looks for signs in need of service or repairs.

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