

Project Staffing Playbook

Mobilising and demobilising engineering project teams without losing the schedule

A project team can be fully staffed on paper and still lose its first month. Badging queues, missing safety training, undocumented systems and unclear reporting lines routinely consume the float that the hiring effort was supposed to protect.

This playbook sequences mobilisation week by week, then treats demobilisation as an equally deliberate activity so the program keeps the knowledge the team built.

Week minus four: scope lock

Before anyone is sourced, fix what the team is being mobilised to do.

- Scope decomposed by system and phase, with document ownership assigned
- Shift pattern, coverage model and supervision ratio agreed
- Site access requirements and their lead times confirmed in writing
- Rate structure signed off including overtime, travel and per-diem treatment
- Escalation and replacement protocol agreed before it is needed

Week minus three to minus two: sourcing and screening

Run technical screening and compliance screening in parallel, not in sequence.

- Technical screens against defined evidence, documented per candidate
- Compliance screening initiated on shortlisted candidates immediately
- Reference checks focused on the specific phase and systems, not general character
- Availability and notice confirmed in writing, with a stated start date
- Panel interviews compressed into pre-held slots

Week minus one: site readiness

The most common mobilisation failure is an engineer who has accepted but cannot enter the site.

- Background, drug and medical screening cleared
- Badging and escort access processed, with a named site contact
- Safety training scheduled: site induction, arc flash, confined space, lockout and tagout as applicable
- PPE and instrumentation issued or confirmed
- Travel and accommodation booked with the rotation pattern documented

Week one: productive from the first shift

Orientation is a technical handover, not a welcome session.

- System walk-down with the responsible engineer, not a document handover alone
- Access to drawings, sequences, test scripts and the punchlist system on day one
- Reporting line, sign-off authority and escalation path stated explicitly
- First deliverable assigned within 48 hours
- End-of-week check on documentation access and blockers

Steady state: coverage and rotation

Rotational and shift teams fail on handover quality far more often than on individual competence.

- Written shift handover standard, including open punchlist items and holds
- Rotation calendar published at least two rotations ahead
- Coverage plan for planned absence and unplanned attrition
- Weekly technical review with the client engineering lead
- Monthly performance and rate review against the original scope

Underperformance and replacement

Agree the remedy while everyone is calm. A protocol negotiated mid-crisis costs schedule.

- Defined observation window with written technical feedback
- Named decision maker for replacement
- Committed replacement lead time by discipline
- Handover requirements for the outgoing engineer
- Root-cause review: specification failure, screening failure, or onboarding failure

Demobilisation and knowledge capture

Run this two weeks before the ramp-down date, not on the last day.



- Turnover documentation complete and reviewed against the standard
- Open punchlist items reassigned with named owners
- System knowledge transferred to the permanent or operations team
- Conversion offers issued to engineers you want to keep
- Closeout debrief on schedule accuracy, scope drift and screening quality

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