



FREE FIELD GUIDE

FOREMAN STARTER PACK

Checklists, 20 AI prompts, and 7 print-ready templates for
leads, foremen, supers, and PMs.

GC • Electrical • Plumbing • HVAC • Concrete • Civil • Industrial • Energy

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START HERE

WHAT'S INSIDE

Built for people moving up from the tools to running the crew. No fluff. Print it, copy it, use it tomorrow.

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Editable Word versions of every template come with this pack. Change the fields to fit your trade.

How to use the prompts: jot quick notes during the day, paste them into a prompt, then read the result before it goes anywhere. The AI drafts. You decide.



CHECKLIST

FIRST WEEK AS A LEAD

You got the promotion. Now the job is getting work done through other people. Tick these off this week.

DAY 1

- ☐ Meet your PM or super. Ask: what do you need from me every day, and by what time?
- ☐ Get the drawings, specs, and schedule you are responsible for.
- ☐ Walk the site. Know exits, first aid, fire extinguishers, and the muster point.
- ☐ Learn every crew member's name, skills, and certs.

DAYS 2-3

- ☐ Find out how reports get sent: app, email, or paper. Same format every day.
- ☐ Learn who to call for materials, equipment, inspections, and safety.
- ☐ Check open permits, inspections, and lockout rules for your area.
- ☐ Ask the crew one question: what slows you down the most?

DAYS 4-5

- ☐ Send a daily report every shift, on time, even if nothing went wrong.
- ☐ Read the 2-3 week look-ahead. Flag anything you can't staff or supply.
- ☐ Run your first toolbox talk. Keep it to 5 minutes.
- ☐ Set up one AI helper your company allows. Try the daily report prompt.

END OF WEEK

- ☐ Send your PM a short Friday update: done, coming up, needs.
- ☐ Write down 3 things you learned and 1 thing you'd change.
- ☐ Thank the crew. Name one person who did something right.

Rule of thumb: listen more than you talk this week. Ask, write it down, follow up.



CHEAT SHEET

TALKING TO YOUR PM

Your PM is juggling cost, schedule, and the client. Make their job easy and they will back you up.

Lead with the headline

First line says what matters. "We're 1 day behind on Level 2 conduit" beats a long story.

Bring problems with options

"Pump is down. I can rent one by 10 AM or move the crew to Area C. Which do you want?"

Use numbers, not feelings

Say "60% done, 2 days left" instead of "going pretty good."

Tell them early

Bad news on day 1 is a problem. Bad news on day 10 is a crisis.

Put it in writing

Talked about it? Send a 2-line email after: what we agreed and who does what.

Ask by when

Every ask gets a date. "Need the answer by Thursday or we stop Friday."

Know their pressure

PMs answer for cost, schedule, and the client. Show how your issue hits one of those.

Keep it short

If it doesn't fit on a phone screen, cut it.

SAY THIS, NOT THAT

INSTEAD OF	SAY
"I think we might have a problem maybe."	"Heads up: steel is 2 days late. Here's my plan."
"The guys are slow."	"We're at 70% of planned. Short 2 hands since Monday."
"Somebody messed up."	"Wall layout doesn't match sheet A-201. RFI going out today."
"Whenever you get a chance."	"Need a decision by 2 PM to keep tomorrow's pour."

The 30-second update: where we are, what's in the way, what I'm doing about it, what I need from you.



SAFETY FIRST

WHAT NOT TO PASTE INTO AI

AI tools can store what you type. Treat every prompt like an email to a stranger.

NEVER PASTE

- × Client, owner, or company names
- × Drawings, plans, specs, or photos of them
- × Workers' full names, phone numbers, IDs, or medical info
- × Passwords, logins, or security layouts
- × Site addresses, gate codes, badge or access info
- × Pricing, bids, rates, budgets, or contract terms
- × Injury details tied to a real person
- × Anything marked confidential or under NDA

SWAP IT OUT

REAL DETAIL	USE INSTEAD
ABC Builders	the GC
1200 Main St tower	Building A
John Smith	Tech 1
\$84,500 change order	the change order
Mike broke his wrist	worker hurt hand, first aid given

ALWAYS

- ☐ Use only the AI tools your company approves.
- ☐ Check every number, name, and date before you send.
- ☐ You sign it, you own it. AI is a helper, not the author.
- ☐ Not sure? Leave it out or ask your PM or safety lead.



20 COPY-PASTE PROMPTS

AI PROMPTS 1-5

Paste into ChatGPT, Copilot, or Gemini. Fill the [brackets]. Check every line.

01 Change order backup *When extra work shows up that's not in the scope.*

Help me write field notes to back up a possible change order.
Include: what the extra work is, why it's outside our scope, when we were told to do it and by who (use roles, not names), crew hours and material used, and photos I took.
Plain words, bullet points. Don't add anything I didn't give you. Mark gaps with [CHECK].

Details: [paste]

02 Near miss write-up *Right after a near miss, while it's fresh.*

Write a near miss report from my notes.
Sections: what happened, where, when, what could have happened, why it happened, what we did right away, what we'll change.
Facts only, no blame, no names (use Worker 1, Worker 2). Don't add anything I didn't give you.
Mark gaps with [CHECK].

Notes: [paste]

03 Pre-task plan / JHA *Before a new or risky task.*

Help me build a pre-task plan for [task] by a [trade] crew.
List the steps in order, the hazards for each step, and the control for each hazard. Add PPE and permits I might need.
Mark anything I should check against our safety program with [VERIFY].

04 Morning huddle *5 minutes before the crew starts.*

Write a 3-minute morning huddle script for my crew.
Cover: today's main goal, who's where, one safety focus, and anything that changed since yesterday.
Sound like a foreman talking. Don't add anything I didn't give you. Mark gaps with [CHECK].

Today's info: [paste]

05 Coordinate with another trade *When another trade is in your way or you're in theirs.*

Write a short, friendly message to the [trade] foreman about a work conflict.
Say where, what's clashing, when we need the area, and offer 2 options to work it out.
No blame, under 100 words. Don't add anything I didn't give you. Mark gaps with [CHECK].

Details: [paste]



20 COPY-PASTE PROMPTS

AI PROMPTS 6-10

06 Inspection prep *The day before an inspection.*

Make a checklist to get ready for a [type] inspection on [system or area].
Group it by: paperwork, field work to check, access and cleanup, people to have on site.
Mark code items with [VERIFY] so I can confirm them.

07 Meeting notes to actions *Right after a coordination meeting.*

Turn my meeting notes into a list of action items.
For each: what, who (by role), and due date. Then list open questions.
Keep it short. Don't add anything I didn't give you. Mark gaps with [CHECK].

Notes: [paste]

08 Spec in plain words *When a spec section reads like a legal document.*

Explain this spec section in plain words for a field crew.
Tell me: what we must do, what we can't do, what needs testing or sign-off, and anything that's easy to miss.
Don't add rules that aren't in the text.

Spec text (no project names): [paste]

09 Tool and material list *Planning a task for tomorrow or next week.*

Make a tool, equipment, and material list for [task] with a crew of [number].
Group it by: tools, equipment, materials, PPE, consumables.
Mark quantities I should confirm with [CHECK].

10 New hire first day *When someone new joins the crew.*

Make a first-day plan for a new [role] on my crew.
Include: safety orientation items, who they shadow, what they'll do in the morning and afternoon, and 3 things to check with them at end of day.
Keep it simple and practical.



20 COPY-PASTE PROMPTS

AI PROMPTS 11-15

11 Feedback to a crew member *When someone needs to fix something.*

Help me give feedback to a crew member about [issue].

Give me: an opener that's direct but respectful, the facts, why it matters, what I need going forward, and a question to hear their side.

Under 60 seconds to say out loud.

12 Call out good work *When someone does it right.*

Write a short shout-out for a crew member who [what they did].

Say exactly what they did and why it mattered to the job. 2-3 sentences, sounds real, not cheesy.

13 Weather plan *When bad weather is in the forecast.*

Help me make a weather plan for [weather] on [date].

List: work we can still do, work we must stop, what to protect or tie down, safety risks, and what to tell my PM.

Mark anything to confirm with [CHECK].

14 Quality checklist *Before you call a task done.*

Make a quality checklist for [task] done by a [trade] crew.

Short yes/no items a lead can check in the field. Group by: before, during, after.

Mark spec or code items with [VERIFY].

15 Summarize a long email chain *When you're tagged on a 30-email thread.*

Summarize this email chain for a busy field lead.

Give me: what's decided, what's still open, what's being asked of me, and any dates.

Under 120 words. Don't add anything that isn't in the emails.

Emails (names removed): [paste]



20 COPY-PASTE PROMPTS

AI PROMPTS 16-20

16 Find the root cause *After rework or a repeat problem.*

Help me find the root cause of [problem] using the 5 Whys.
Ask me one 'why' at a time and wait for my answer. At the end, sum up the root cause and 2-3 fixes that stop it happening again.

17 Plan a task step by step *Before a task you haven't run before.*

Break [task] into steps for a [trade] crew of [number].
For each step: what gets done, who does it, rough time, and what has to be done first.
Mark guesses with [CHECK] so I can adjust.

18 Ask for more hands or gear *When you can't hit the schedule with what you have.*

Write a short request to my PM for [more workers / equipment].
Include: what we're short, what it's costing us in days or output, what I need, for how long, and by when.
Use numbers. Under 120 words. Don't add anything I didn't give you. Mark gaps with [CHECK].

Details: [paste]

19 Learn a PM term *When the office uses words you don't know.*

Explain [term, like float, critical path, or earned value] like I'm a foreman moving up to super.
Give a plain definition, a jobsite example, and why my PM cares about it. Under 150 words.

20 Practice a tough talk *Before a hard talk with your PM, GC, or crew.*

Role-play a conversation with a [PM / GC super / crew member] about [issue].
You play them and push back like a real person would. After 5 back-and-forths, tell me what I did well and what to say better.

Daily Report

How to use: Fill this out at the end of every shift and send it before you leave. Keep the same order every day so your supervisor knows where to look.

COMPANY / PROJECT <i>Your company and project name</i>	LOCATION / AREA <i>Example: Building 1, Level 2</i>	DATE <i>Example: 10/20</i>
PREPARED BY <i>Your name and role</i>	WEATHER <i>Example: Clear, 60s, dry</i>	SHIFT HOURS <i>Example: 7 AM to 3:30 PM</i>

1. Heads up: anything that affects schedule, cost, or safety

Example: Material delivery is late, may lose half a day. If nothing, write: Nothing new to flag.

2. Crew on site

Role or trade	Headcount	Hours	Notes
<i>Example: Installers</i>	<i>4</i>	<i>8 each</i>	<i>1 left at noon</i>

3. Work completed: what, where, and how much

Example: Installed 120 ft of pipe in Room 104. About 80% done.

4. Problems and what you did about them

Example: Wrong part delivered. Called supplier. New part arrives tomorrow 7 AM.

5. Safety: talks, near misses, incidents

Example: Morning talk on ladder use. No incidents. 1 near miss reported.

6. Tomorrow and needs

Example: Finish Room 104. Need a lift by 7 AM and an answer on question #12.



Delay Notice (5 Ws)

How to use: Fill this out the same day work gets held up. Stick to the facts and leave out blame. Send it, then keep a copy.

COMPANY / PROJECT <i>Your company and project name</i>	LOCATION / AREA <i>Example: Building 1, Level 2</i>	DATE <i>Example: 10/20</i>
PREPARED BY <i>Your name and role</i>	SENT TO <i>Example: Project manager</i>	NOTICE # <i>Example: 003</i>

WHO is held up, and who or what caused it?

Example: Our crew of 5. Waiting on another contractor to finish their work.

WHAT work stopped or slowed down?

Example: Wall install in Area 2 stopped.

WHEN did it start? How long so far, and how long expected?

Example: Started Tuesday 7 AM. 1 day so far, 2 days expected.

WHERE on site?

Example: Building 1, Level 2, Room 210.

WHY did it happen, and what did you do about it?

Example: Material was not delivered. Moved the crew to other work and called the supplier.

Impact: time, crew, and cost

Example: 5 workers moved for 8 hours. Finish date for Area 2 at risk.

What I need, and by when

Example: A decision on overtime by Thursday 12 PM.

Sent by (signature)

Received by

Date received



Toolbox Talk and Sign-In

How to use: Talk for about 5 minutes on one topic, then ask the crew a question. Everyone prints their name and signs below.

COMPANY / PROJECT <i>Your company and project name</i>	LOCATION <i>Example: Main gate</i>	DATE AND TIME <i>Example: 10/20, 7:00 AM</i>
LED BY <i>Your name and role</i>	TOPIC <i>Example: Ladder safety</i>	LENGTH <i>Example: 5 minutes</i>

Key points (aim for 3)

Example: 1. Check the ladder before you climb. 2. Keep 3 points of contact. 3. Don't stand on the top step.

Questions or concerns raised by the crew

Example: Need more short ladders on Level 2.

#	Name (print)	Company or crew	Signature
1	<i>Print full name</i>	<i>Company or crew</i>	<i>Sign here</i>

Shift Handoff

How to use: Fill this out before you leave. The next shift should be able to start work without calling you.

COMPANY / PROJECT <i>Your company and project name</i>	LOCATION / AREA <i>Example: Building 1, Level 2</i>	DATE <i>Example: 10/20</i>
OUTGOING LEAD <i>Your name</i>	INCOMING LEAD <i>Next lead's name</i>	SHIFT / TIME <i>Example: Day to night, 3:30 PM</i>

Work status: done, in progress, not started

Example: Room 104 done. Room 105 half done, stopped at north wall.

Hazards, permits, and lockouts in place (write them out in full)

Example: Lockout on Panel 2, tag #14, still on. Hot work permit closes 6 PM.

Equipment and tools

Example: Lift #2 needs charging. Saw blade is worn.

Materials

Example: Pipe delivered and stored in Room 101. Fittings short, on order.

Next tasks, in order

Example: 1. Finish Room 105. 2. Start Room 106.

Who to call

Example: Supervisor and phone number. Supplier and phone number.

Outgoing lead (signature)

Incoming lead (signature)

Time of handoff



3-Week Look-Ahead

How to use: List the work planned for the next 3 weeks and mark the weeks with an X. Write what you need so nothing catches you off guard.

COMPANY / PROJECT <i>Your company and project name</i>	LOCATION / AREA <i>Example: Building 1</i>	PREPARED BY <i>Your name and role</i>
WEEK STARTING <i>Example: 10/20</i>	DATE UPDATED <i>Example: 10/17</i>	PAGE ___ of ___

[illegible]

Risks to flag to your supervisor

Example: Inspection not booked yet for Wk 2.

Crew Assignment Board

How to use: Write who is working where and on what. Post it or text a photo to the crew at the start of the shift.

COMPANY / PROJECT <i>Your company and project name</i>	LOCATION <i>Example: Building 1</i>	DATE <i>Example: 10/20</i>
PREPARED BY <i>Your name and role</i>	SHIFT <i>Example: Day, 7 AM to 3:30 PM</i>	TOTAL CREW <i>Example: 8</i>

Name or role	Area	Task	Tools or equipment	Training needed	Notes
<i>Example: Crew member 1</i>	<i>Room 104</i>	<i>Install fixtures</i>	<i>Lift, drill</i>	<i>Lift training</i>	<i>Lead on task</i>

Safety focus for today
<i>Example: Keep walkways clear. Wear eye protection when cutting.</i>

Punch List

How to use: Walk the area and write one item per line. When an item is fixed, write the date and your initials.

COMPANY / PROJECT <i>Your company and project name</i>	LOCATION / AREA <i>Example: Building 1, Level 2</i>	DATE WALKED <i>Example: 10/20</i>
WALKED BY <i>Your name and role</i>	OTHERS PRESENT <i>Example: Owner's rep</i>	PAGE ___ of ___

[illegible]



KEEP LEVELING UP

More free prompts, templates, and leadership tips for the field at hardhathacks.com.

Use company-approved tools.

Never paste client info, drawings, or pricing.

Check every word before you send.