

PRACTICAL FIELD NOTES

Opening a new location: decisions to settle before day one

Create a shared operating brief covering responsibility, workforce information, local setup and the evidence needed for a controlled handover to the running team.

Describe the operating model

Begin with a clear description of what will happen at the location. Identify the entity operating it, the activities planned, the expected workforce and any vendors involved. Record whether employees will be based there permanently, move between locations or work under another arrangement. These details give the teams reviewing the opening a common starting point.

Use one agreed address and location identifier across the opening pack. Confirm how the location will appear in employee records, attendance inputs, payroll information and internal reporting. Capture unresolved questions explicitly, including who is responsible for assessing them. Do not let an unanswered question become an assumption that is copied into several systems.

Connect responsibilities and dependencies

List the workstreams needed to open and operate the site, then assign an accountable owner to each. Facilities, HR, payroll, finance, operations and external advisers may all need different information. Identify the local contact as well as the central owner so that a request can reach someone able to act.

Show where one task depends on another. Employee setup may need a confirmed location identifier; a vendor review may need an agreed scope of work. Record any approvals or documents that the project has identified as necessary and who will verify them. Review blocked dependencies together instead of treating every team's list as independent.

Walk through the employee journey

Test the planned process using a representative employee record without entering invented information into live systems. Follow the journey from approved onboarding information through location assignment, attendance capture and payroll input. Check who receives each handover, what they need to see and how they will raise a query.

Include ordinary changes in the walkthrough: a transfer, a correction to a record or a question from an employee. Confirm which team answers and where the resolution is recorded. Where vendors supply people or services, make their handover requirements equally clear. Keep the walkthrough focused on decisions and missing information, rather than whether a form exists.

Hand over a visible readiness record

Bring the opening decisions, evidence and outstanding work into a short readiness record. Each item should show its owner, current position and any dependency. Ask owners to confirm their entries and record the decision made about items still open. The running team needs to understand both the completed setup and the work it is inheriting.

After opening, use the first operating cycle to check the handover against actual use. Can the team find the correct records, route an employee query and explain a location-specific input? Record corrections in the shared brief and assign ownership for maintaining it. An opening pack stays useful when it becomes an operating reference.

Put it into practice

- Agree the operating model and location identifiers early.
- Make dependencies and local ownership visible across teams.
- Test the handover and keep outstanding decisions explicit.