



PROJECT PLANNING WORKBOOK

Solar Logistics Cost Readiness Checklist

Pressure-test transportation, storage, staging, site readiness, and delay exposure assumptions. Assumptions are treated as final.

READY
TO SCOPE

HOW TO USE THIS CHECKLIST

Complete it with procurement, construction, project controls, and logistics. Mark unknowns openly. A good quote can carry assumptions; it should not hide them.

PROJECT / SITE

PREPARED BY

PROJECT STATE

REVIEW DATE

TARGET FIRST DELIVERY

TARGET FINAL DELIVERY

READINESS AT A GLANCE

- ☐ Equipment quantities, packaging, dimensions, and weights are confirmed.
- ☐ Origin, handoff terms, pickup windows, and supplier contacts are known.
- ☐ Storage and staging needs are separated from direct-to-site assumptions.
- ☐ The site can state realistic trucks-per-day receiving capacity.
- ☐ Access roads, gates, appointments, offload equipment, and laydown space are verified.
- ☐ Delivery sequence is tied to workfront or installation readiness.
- ☐ Detention, layover, redelivery, handling, and recovery assumptions are visible.
- ☐ An owner is assigned for schedule changes, exceptions, and release decisions.



SECTION 1

Define what is moving and how it enters the project.

A responsible transportation scope starts with more than origin and destination. Capture equipment, packaging, handoffs, route constraints, and operating expectations.

EQUIPMENT PROFILE

- ☐ Equipment type is identified: modules, inverters, BESS, transformers, racking, trackers, cable, BOS, or mixed materials.
- ☐ Piece, pallet, crate, bundle, container, and truckload quantities are documented.
- ☐ Packaged dimensions, weights, center-of-gravity concerns, and stack limits are available.
- ☐ Special handling, hazmat, weather protection, securement, temperature, or indoor-storage requirements are documented.
- ☐ Serial-number, lot, damage-inspection, and proof-of-delivery requirements are defined.

ORIGIN, HANDOFF, AND ROUTING

- ☐ Origin address, port, supplier, factory, warehouse, and pickup contacts are confirmed.
- ☐ Incoterms or commercial handoff point clearly show when logistics responsibility begins.
- ☐ Pickup windows, appointment rules, free time, port constraints, and demurrage exposure are known.
- ☐ Required equipment is identified: dry van, flatbed, step deck, chassis, specialized trailer, permits, or escorts.
- ☐ Route review accounts for distance, tolls, bridge limits, seasonal restrictions, and remote-site access.
- ☐ Backup carrier capacity and escalation contacts exist for missed pickups or delivery windows.

DECISION CHECKPOINT

If quantities or dimensions are still moving, label the quote as budgetary and list the assumptions that must be reconfirmed before tender.

PRIMARY ORIGIN

COMMERCIAL HANDOFF

ESTIMATED LOADS

REQUIRED TRAILER

TARGET PICKUP START

BACKUP CAPACITY OWNER



SECTION 2

Separate storage, staging, and cross-dock requirements.

A yard or warehouse is not just acreage. The scope must explain receiving, control, protection, reporting, release logic, and rehandling.

FACILITY AND RECEIVING READINESS

- ☐ Facility location supports the inbound route and practical final delivery distance.
- ☐ Operating hours, appointment process, gate controls, and receiving contacts are documented.
- ☐ Yard surface, drainage, lighting, fencing, security, and weather exposure fit the equipment.
- ☐ Indoor, covered, outdoor, temperature-controlled, or hazmat requirements are confirmed.
- ☐ Forklift, crane, rigging, dock, ramp, and container-handling capability match the freight.
- ☐ Inspection, damage notation, photography, and discrepancy escalation are defined at receipt.

INVENTORY AND RELEASE CONTROLS

- ☐ Inventory will be separated by project, equipment class, block, workfront, or delivery wave.
- ☐ Serialized or lot-level tracking requirements are defined before the first receipt.
- ☐ The release authority and approval process are clear; verbal instructions are not the only control.
- ☐ Daily or weekly inventory, receipt, release, damage, and exception reports are specified.
- ☐ Rehandling, cross-dock, repackaging, load securement, and outbound documentation are priced.
- ☐ The plan covers early arrivals, construction delays, extended dwell, overflow, and emergency moves.

COST WATCH

Confirm minimum storage periods, free days, inbound and outbound handling, monthly billing units, security, insurance, and after-hours charges.

FACILITY / MARKET

PLANNED STORAGE TERM

INVENTORY DETAIL LEVEL

RELEASE APPROVER

ESTIMATED RELEASES PER DAY

OVERFLOW PLAN



SECTION 3

Match releases to real receiving capacity.

The cheapest linehaul plan can become expensive when trucks arrive faster than the site can receive them. Validate the field conditions that control flow.

ACCESS AND RECEIVING CONDITIONS

- ☐ Site address, GPS pin, approved route, gate, check-in process, and delivery contact are confirmed.
- ☐ Road width, turning radius, grade, bridge limits, mud, dust, snow, and weather restrictions are reviewed.
- ☐ Appointment windows, delivery days, holidays, curfews, and after-hours rules are documented.
- ☐ Offload crew, forklift, telehandler, crane, rigging, and spotter availability match the planned cadence.
- ☐ Laydown space and material drop zones are ready before each release.
- ☐ Truck turnaround target and maximum queue are realistic for current site conditions.

SEQUENCE, COMMUNICATION, AND RECOVERY

- ☐ Trucks-per-day target is supported by the site, not just the transportation schedule.
- ☐ Release order follows blocks, rows, workfronts, or installation sequence.
- ☐ A daily confirmation process verifies the next release before trucks depart.
- ☐ Carrier, yard, site, construction, and project controls share one escalation path.
- ☐ Weather holds, site closures, refused loads, detention, layover, and redelivery rules are defined.
- ☐ Recovery capacity exists for missed days, compressed windows, or schedule acceleration.

DAILY GO / NO-GO QUESTION

Can the site receive tomorrow's planned trucks with the available road, gate, people, equipment, and laydown space? If not, change the release before trucks move.

PLANNED TRUCKS / DAY

MAXIMUM TRUCKS / DAY

TARGET TURN TIME

SITE RELEASE CONTACT

WEATHER DECISION TIME

RECOVERY CAPACITY



SECTION 4

Compare the plan, not just the truck rate.

Use this page to make exclusions, accessorials, and ownership visible before a low initial number becomes a high project cost.

CONFIRM EACH COST CATEGORY

- ☐ Linehaul, fuel, tolls, permits, escorts, drayage, chassis, and port-related charges.
- ☐ Inbound receiving, unloading, inspection, photos, inventory entry, and damage notation.
- ☐ Storage rate, billing unit, minimum term, free days, security, insurance, and extended dwell.
- ☐ Outbound handling, rehandling, cross-dock, repackaging, securement, and documentation.
- ☐ Detention, layover, truck ordered not used, cancellation, redelivery, and refused-load charges.
- ☐ After-hours, weekend, holiday, remote access, weather delay, and site recovery charges.
- ☐ Reporting, project management, dedicated coordination, and escalation coverage.
- ☐ Liability limits, claims process, exclusions, assumptions, and change-order triggers.

QUOTE COMPARISON

CATEGORY	PROVIDER A	PROVIDER B	OPEN / RISK
Transportation			
Storage / staging			
Handling			
Delay exposure			
Reporting / control			
Key exclusions			

FINAL READINESS TEST

- ☐ The full material path and receiving plan are clear.
- ☐ Unknowns have assumptions, owners, and reconfirmation dates.
- ☐ Normal execution and likely exception costs are both visible.

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