



INDUSTRIAL CAPEX READINESS CHECKLIST

A practical checkpoint for production-critical facility improvements

Industrial capital projects succeed or fail long before construction begins.

This snapshot highlights the core alignment questions experienced operators use to reduce risk, protect production, and maintain schedule certainty.

Use this as a quick internal check before advancing scope, approvals, or contractor selection.

OPERATIONS & CONTINUITY

- Shutdown windows are clearly defined and realistic
- Construction phasing aligns with production schedules
- Temporary utilities, bypasses, or workarounds identified
- Live-environment safety risks assessed and mitigated
- Operations leadership aligned on sequencing approach

SCOPE & TECHNICAL CLARITY

- Equipment specifications finalized or allowances defined
- Tie-ins, interfaces, and process impacts identified
- Existing conditions validated (not assumed)
- Utility capacities confirmed (power, gas, water, air, data)
- Long-lead materials or equipment identified

SCHEDULE & RISK MANAGEMENT

- Critical path clearly understood
- Schedule flexibility identified where possible
- Seasonal or weather constraints considered
- Contingency plan defined for schedule disruption
- Internal approvals aligned with project milestones

CAPITAL & INCENTIVE ALIGNMENT

- Budget reflects operational risk and complexity
- CapEx timing aligned with fiscal planning
- Incentives or tax credits evaluated early
- Owner costs separated from construction costs
- Procurement strategy defined (early buy, direct purchase, etc.)

DELIVERY STRATEGY

- Delivery method evaluated (design-build vs. bid-build)
- Self-perform opportunities identified
- Contractor experience in active facilities verified
- Safety record and shutdown execution reviewed
- Long-term partner vs. one-off contractor considered

NEXT STEP

Want to walk through this checklist with a team experienced in active, production-focused facilities?

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