



Ray Bakker ✓

Here is a simple but powerful rule ... always give people more than they expect to get.

# 18 Steps To Quality Fixture, Display & Kiosk Installations

## SHOPFIT'S Step-By-Step Guide To Installation Improvement

Over the past 30 years, I have seen many changes in the way fixtures, displays and kiosks have been designed and fabricated. However, the one thing that has not changed is the care, skill, and attention to detail required in successfully handling and installing such products.

The methods and skills used during installation are no secret, and there are systematic steps *before, during* and *after* installation to provide a high-quality service.

By using the following as a check list, you will be able to ensure that the final appearance (and use) of the fixture, display and kiosk is as intended, free from warranty issues, reflecting the true quality of the product, and ensuring the highest possible level of consumer experience, leading to value-add for all parties involved.

1. **Engineering and Design:** Understanding the scope of work, the intent of usage and site conditions will have a dramatic effect whether the project runs smoothly with minimal rework and is capable of being used efficiently and ergonomically for the intended purpose. Working closely with the estimator to see if conditions now exist that were not allowed for in the original scope of work is prudent.
2. **Site Preparation:** Before you are asked to deliver your product to the site, you should make sure the site is actually ready to receive the product. Before delivering to the site, as well as during and following installation, the building environment must be stabilized. The degree to which floors are level, and walls and openings are plumb and square should be determined beforehand. It is generally understood in the industry that if an installer decides to accept these conditions without notifying the contractor/client, then they may become accountable for any additional work or costs associated with the out-of-specification item.
3. **Logistics:** If the fabricator must ship long distances to the project site, it is very important that the products are well wrapped and protected so that they can absorb the movement of being in either a truck/train/plane/ship. It is often better to overprotect finished fixtures with additional wrapping, foam and crating. Sturdier crates and additional packaging are often required the further the millwork is being shipped from the manufacturing plant. Understand that movement of a road trailer (up and down, and sideways from roads and curbs) vs a rail container (forwards and backwards, from shunt yards) are different, so pack accordingly. This will ensure that the product arrives free of damage, helps avoid insurance claims and that repair costs, if any, are minimal. If the product must be exported, then additional logistics are involved such as dealing with customs brokers and documentation.
4. **Onsite Receipt and Inspection:** Make sure all the necessary millwork items and all shop drawings are included so that the installer knows the location of all components. All hardware and fasteners must also be on site and well-marked for quick access. Report any missing items immediately so that the plant can supply them quickly. The installer should also inspect all areas of the intended fixture installation to review that the preparatory work done by others is acceptable, that all areas receiving millwork have the appropriate relative humidity and that the millwork that is received is compliant with the contract documents.
5. **Product Acclimatizing:** The generally accepted standard for best results is to allow the millwork to acclimatize for 72 hours in field conditions. Installers should avoid unloading and installing finished millwork from a truck that has traveled in sub-zero temperatures.

6. **Site Storage:** If due to scheduling or other issues on-site storage is required past the acclimatization period, then the storage environment must meet the same criteria as mentioned in the delivery section above, namely that the humidity and temperature levels fall within the accepted parameters and that preparatory work is complete and dry.
7. **Site Safety:** Larger projects usually require that the general contractor has a health and safety program in place. Sub-trades are required to follow the safety protocols, which means existing policies are to be in place, and that proper Personal Protective Equipment is worn. Even on small jobs the installer must be aware of the conditions behind walls, under floors, and above ceilings so that fasteners do not puncture items such as existing electrical or plumbing systems. In Canada this now includes a Working at Heights certification.
8. **Site Protection:** Protection of previous work undertaken by other trades should happen before installation begins. Finished painted walls, flooring, installed appliances, windows, and doors will require protection from potential damage.
9. **Special Equipment:** Larger projects and projects including the hanging of signs may require items such as scaffolding, scissor lifts, or the booking of elevators/loading docks. These are requirements that must be coordinated earlier to avoid costly delays.
10. **Field Modifications:** Installers often have their own special expertise and equipment. Sharp tools/blades produce the best results in terms of quality of cut and efficiency. All work that can be completed at the fabricator should be completed there, as installation rates are usually higher than shop rates and can add additional cost and time to the project. Any trimming that is done in the field that opens previously sealed surfaces needs to be re-sealed in the field to prevent moisture from entering the woodwork.
11. **Square and Plumb:** The carpentry trade is often required to address the imperfections of previous construction practices such that in the end, the woodwork has a precise and clean look. This is accomplished through various methods including installing the fixture level and plumb. This is the point at which the value of the fixture and how it is installed will greatly enhance the value of the site environment. If you predict such issues ensure you have qualified trades booked, as not all installers are competent finish carpenters.

12. **Adhesives and Fasteners:** Using the correct fasteners and adhesives for the structural characteristics they were intended for is crucial. For example, cleats used to hang fixtures on the wall not only aids in installation but also, if ever the need arises to replace one or all components, are easy to remove without damaging the woodwork.
13. **Other Elements:** Other elements such as glass, mirrors, architectural metal, electrical, stone, and fabric/upholstery can be incorporated into the fixture. Sometimes this is done in the manufacturing plant but on occasion, needs to be attached in the field at time of installation. Coordination and communication between the various trades becomes critical for a successful and efficient installation of these additions.
14. **Touch Ups and Finishes:** Most fixtures today are factory-finished but there are some instances where touch-ups are required and usually a finisher will come to the site to perform touch-ups that are equal in quality and performance to the original finish.
15. **Site Clean Up:** It is very important to clean up all shipping cardboard and wrapping products, as well as all additional material, cut-offs, dust, garbage, adhesives and dispose them in the appropriate dumpster or recycling bin. Ensure these services are booked in advance as not all sites have disposal units, or space, available. It may become the sudden responsibility of the trade to remove and dispose of items off-site, which can become contentious if the trade does not have the appropriate vehicle to do so.
16. **Maintenance Programs:** The fixture fabricator/supplier is responsible for providing guidelines for product maintenance. Recommendations on the appropriate cleaners, and how often they should be used is all useful information for the installer to leave with the client.
17. **Deficiency List:** Upon completion of the installation or as close as reasonably possible, the client or their representative will do a walk through to inspect the fixtures. At this time it cannot be stressed enough that the company representative be present at the walk through. It should also be noted that you get clarification that there will be only one deficiency list. The items on this list will require rectification before any hold backs are released.
18. **Client Satisfaction Follow Up:** Surveys will often give information and insight for fabricators and installers to make continuous improvements in their process. Conducting a review with the installer after a project is complete can provide details to identify

performance barriers. Implementing a corrective action plan can then remove the barriers that impede optimum future performance. Client satisfaction is certainly one of these key performance indicators that all parties try to maximize.

## Summary

If you are managing a project, be proactive and be the first to visit the site in the morning or follow up daily via a phone call with the contractor, installer or onsite supervisor to minimize any issues and provide timely service.

Remember, communicating is perceived as respect, whether the message is good news, or bad. Problems don't go away when ignored so face them head on. Always deal in a professional and courteous manner thinking of how you would like to be treated.

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*"Express ShopFitters (aka SHOPFIT) has been installing retail fixtures, displays and kiosks at retail, exclusively for fixture fabricators, logistics providers and retail activators for over 25 years. Our success has come from applying vast accumulated knowledge. Through extreme communication skills, our coordinated and experienced national network of local and qualified installation teams have positioned ShopFit as one of the markets pre-eminent fixture installation partner for all of our clients, and their customers.*

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