



# LIFT PLANNER PRO

LIFT PLANNING SERVICES | CLIENT INTAKE

£40 per hour plus VAT

## 01 Your lift planning enquiry

Please complete this pack and return it with the supporting files to Micky at [support@liftplannerpro.co.uk](mailto:support@liftplannerpro.co.uk). We use your information to define the work, prepare the proposed lifting arrangement and identify the checks needed for the agreed lift plan.

Complete on screen in a PDF reader, save your copy, or print and write clearly. Attach extra sheets for longer answers. Use one load and rigging record for each distinct arrangement.

### Project and company

Project name, your company, site address and postcode. Include your name, telephone number and email.

### The job and deadline

What needs moving, from where to where, how many lifts, proposed lift date and date the reviewed plan is needed.

### Information available now

Start with load weight and dimensions, photographs, a marked site plan, pick and landing positions, heights, available crane details and any known restrictions.

### Service and fee agreement

Planning services are £40 per hour plus VAT. Estimated hours, scope, any expenses or specialist services and authorisation to proceed will be agreed in writing. Enter your purchase order or quotation reference if available.

You may return an initial enquiry before every item is available. Mark missing information UNKNOWN and name the person who can supply it. Use N/A with a reason where an item does not apply. This intake is not a lift plan or permission to lift.



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## 02 Project scope and responsibilities

Complete for each site or distinct package of work. Tell us whether you need planning support only or a separately agreed wider service.

### Client and site organisations

Client, principal contractor, site operator, crane supplier and contracting entity. Give the billing address and procurement contact.

### Planning contacts

Name, company, phone and email for the appointed person, site manager, lifting supervisor, engineering reviewer and client approver. Identify any role still to be appointed.

### Scope requested

State whether you require crane selection, calculations, 3D model, site visit, drawings, method statement, risk assessment, review of an existing plan or assistance with revisions.

### Type and complexity of operation

Single crane, tandem or multiple crane, upending, pick and carry, unloading, demolition, repetitive lifting, confined space or another specialist operation. Identify critical lift rules used by the site.

### Responsibility and contract arrangement

Crane hire or contract lift? Identify who appoints the planner, controls the operation, supplies verified site/load data, approves the plan and provides supervision. Attach the written allocation of responsibilities.

### Timing and interfaces

Shutdown windows, shifts, delivery dates, simultaneous operations, site induction, review turnaround and permissions needed before work starts.

Do not assume that buying a drawing transfers lifting responsibilities. Under a crane hire arrangement, planning and execution responsibilities must be explicitly allocated; a contract lift arrangement must state what the supplier takes on. [2]



## 03 Load information for each item

Copy this page for every distinct load. Use a unique load ID and attach the manufacturer or fabricator drawing, lifting instructions and recent photographs.

### Identification and quantity

Load ID, description, manufacturer, model, serial number if applicable, number of identical items and whether the item is new, used, damaged or modified.

### Verified lifted mass

State mass in kg or tonnes, its source, date and uncertainty. Include contents, trapped liquids, insulation, attachments, temporary steelwork and loose parts. Identify separately what is excluded.

### Dimensions and orientation

Overall length, width, height and diameter as relevant. Include protrusions, lifting and transport orientations, installation tolerances and any packaging or supporting frame.

### Centre of gravity

Give the centre of gravity in three axes from an identified datum, with drawing and tolerance. Describe uneven, moving or liquid contents and changes during rotation or installation.

### Lifting points and structural suitability

Show each lug/trunnion/pick point location and allowable load/direction. Supply design verification, material/weld information, inspection/NDT evidence and permitted sling angles where required.

### Load condition and handling limits

Fragility, sharp edges, surface protection, no-clamp/no-sling zones, temperature, chemical contamination, pressure or hazardous contents. State wind-exposed area and restrictions from the manufacturer.

A mass entered in CAD is not weighing evidence. If mass, centre of gravity or lifting-point capacity is uncertain, describe the proposed verification method and responsible supplier. Do not substitute an unsupported estimate for a verified value.



## 04 Site survey and lifting geometry

Provide a current measured site plan. Mark a common horizontal and vertical datum so load, crane, structures and levels can be matched.

### Location and survey basis

Address, coordinates, coordinate system, north direction, scale, survey date, drawing revision and survey accuracy. Identify whether dimensions were surveyed, measured, estimated or taken from mapping.

### Crane setup positions

Mark crane centre of slew, orientation, outrigger or track footprint and setup levels. Show possible alternative positions, assembly area and counterweight/ballast tail-swing clearance.

### Pick and landing positions

For each load ID, mark start/end coordinates, support levels, final elevation and orientation. Show the load centre of gravity and the intended hook line at pick and set.

### Travel path and worst positions

Show the full slewing/load path and any change of radius, height or orientation. Include obstructions, required separation, intermediate holds and the most restrictive point.

### Heights and clearances

Give rack/building/pipe/structure heights, load underside and top levels, hook height, rigging headroom and available boom/head clearance. Include deflection or movement allowances required by the responsible designer.

### Photographs and model files

Supply views from the proposed crane position, pick point, landing point and approaches. Provide dimensioned PDF and native CAD/BIM or point-cloud files where available, with units and revision.

Map imagery is a location reference, not a dimensional survey. Mark what exists now and what will change before the lift. Include pipe racks and nearby operating plant, not only the crane and load.



## 05 Crane duty and configuration

Complete for every crane. If a crane has not been selected, name the supplier and describe the constraints so selection can be included in the agreed scope.

### Crane identity and supplier

Manufacturer, full model/variant, fleet or serial number, year if relevant, crane owner contact and current manufacturer operating instructions.

### Selected duty chart

Supply the exact chart or OEM planning output for the proposed configuration. Include chart reference/revision, units, working sector, radius, boom length and rated capacity at every governing stage.

### Boom and attachments

Main boom length and telescoping mode, lattice sections, fly/jib type and length, offset/luffing angle, mast, derrick, superlift and any erected or stowed attachments.

### Ballast and support geometry

Upper and lower counterweight masses, ballast/superlift radius, tray/trolley arrangement, outrigger extensions including asymmetry, track extension, support footprint and permitted level tolerance.

### Hoist and hook arrangement

Hook block/ball or lifting attachment identity, mass and capacity; parts of line, rope/hoist limitations, auxiliary head and unused attachments. Supply all chart-required capacity deductions.

### Operating restrictions and reactions

Manufacturer wind/load-area limits, permitted travel or pick-and-carry duty, slew restrictions, assembly procedure and maximum support reactions for the full operation. Include supporting output and input settings.

A crane brochure maximum capacity is not the selected duty. Gross suspended load and capacity deductions must follow the exact manufacturer chart convention so hook, accessories and attachments are neither omitted nor counted twice.



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## 06 Rigging and tackle information

Provide a proposed tackle sketch and a rigging list, or ask LPP to develop the arrangement. Record actual items and manufacturer data before final verification.

### Load connections and arrangement

Identify every lifting point and connection from crane hook to load. State direct attachment, basket, single/double-wrap choker or other hitch; show wrap locations, spacing and protection.

### Slings and leg geometry

For each leg: ID, type/material, manufacturer, length and definition of length, WLL, condition, hitch, angle to vertical or included angle, adjustment range and any unequal lengths.

### Shackles and connection hardware

IDs, type, WLL, pin diameter, internal dimensions, orientation and quantity. Include master links, swivels, hooks, lifting eyes, chain adjusters, clamps and manufacturer side-loading restrictions.

### Beams frames and special devices

Spreader/lifting beam identity, self-weight, span, rated configuration, connection geometry, design/certification, examination and instructions. Include lifting frames, magnets or vacuum devices where applicable.

### Certificates and reductions

Provide current thorough examination reports, inspection status and applicable instructions. Identify hitch/angle/bend-radius/temperature/edge reductions and permitted point loads. Do not apply a generic reduction without its basis.

### Fit and removal

Show physical fit at hook, lugs and shackles; retained pins/latches, sling bearing surfaces and anti-slip measures. Explain how rigging will be installed and removed safely at pick and landing.

List each accessory mass separately for the suspended-load calculation. A 3D sling that visually reaches a point does not establish suitable length, capacity or connection fit.



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## 07 Ground slabs and support design

Ask the site owner and the relevant geotechnical/structural designer to provide evidence for every crane support position, assembly area and travel route.

### Ground and surface description

Soil, fill, hardstanding, concrete slab, suspended slab or other support. Include levels, gradients, drainage, recent works, deterioration, waterlogging and changes expected before the lift.

### Geotechnical evidence

Ground investigation, formation details, allowable bearing pressure with units and basis, settlement limits, groundwater and restrictions. Name the competent person accepting the ground design.

### Concrete and buried structures

Slab thickness, reinforcement, concrete strength, joints, edges, foundations, basements, culverts and buried tanks. Provide structural capacity evidence; identify punching, bending and load-spreading checks required.

### Underground services and nearby edges

Current utility survey, service protection and exclusion distances; excavations, trenches, retaining walls, slopes, voids and backfilled areas. Show these against each support and the travel route.

### Crane reactions and load cases

Supply manufacturer/supplier support reactions for the exact duty and governing slew/load positions. Identify units, static/dynamic/design factors, load cases and the highest reaction at each support.

### Mats pads and foundations

Quantity, length, width, thickness, material, structural rating and layout. Supply mat/foundation calculations and evidence for effective contact area, support stiffness, bearing and settlement acceptance.

Concrete surface alone does not prove capacity. Do not divide total crane weight equally between supports. Bearing pressure uses a justified governing reaction and effective area; mat strength, slab and underlying ground still need checking separately.



## 08 Access hazards and site controls

Describe the conditions the lifting team will actually encounter, including delivery, crane assembly and dismantling.

### Vehicle route and access

Gate widths/heights, road and bridge limits, turning space, gradients, overhead restrictions, delivery vehicle size, escort needs, unloading area and ground capacity on approach routes.

### Overhead and underground services

Electricity lines, substations, cables, gas/water/process lines and utilities. Provide asset-owner requirements, isolation arrangements and agreed clearance controls; do not infer safe distances from a photograph.

### Operating plant and public interfaces

Live process plant, pipe racks, occupied buildings, roads, railways, public boundaries and adjacent contractors. Identify shutdowns, exclusion zones, barriers, traffic diversions and interface owners.

### Environmental limits

Expected wind and gust conditions at load/boom height, load sail area, lightning, visibility, lighting, rain, ice and temperature. Provide site and manufacturer stop/restart limits and monitoring arrangements.

### Special hazards and permits

Hazardous areas, flammable/toxic materials, asbestos, contamination, confined spaces, work at height, hot work, excavation or road/rail permits. Attach relevant permits and site emergency requirements.

### People and emergency access

Pedestrian routes, muster points, first aid, emergency contacts, rescue/access arrangements, exclusion-zone control and how the operation will stop and be made safe if conditions change.

Declare restrictions even if you expect another contractor to manage them. Name the owner of each isolation, permit and boundary control.



## 09 Method sequence and supervision

Supply the intended work sequence and site arrangements. Identify where the operation must pause for a check or authorisation.

### Preparation and assembly

Delivery, unloading, crane positioning, support preparation, ballast/boom assembly, rigging installation, checks, permits, briefings and exclusion-zone setup.

### Lift sequence

Describe attachment, taking the weight, initial balance check, hoisting, slewing/travelling, clearance checks, positioning, landing, securing and detaching. Identify intermediate hold points.

### Load stability and landing

State how swing, rotation or sliding is controlled; tag-line arrangements and safe positions. Explain temporary supports, final fixings and how stability is confirmed before releasing the crane.

### Communication and visibility

Signal method, radio channel and backup, lead signaller, blind zones, camera/spotter needs, language requirements and the agreed stop command.

### Personnel and competence

Named appointed person/planner, supervisor, operators, slinger/signallers and specialist support. Supply role-specific competence evidence and arrangements for substitutes or shift changes.

### Failure and change control

Actions for unexpected movement, loss of communication, equipment fault, wind increase or emergency. Who can stop/restart? Who reviews a change in load, crane, rigging, ground or sequence?

The plan must cover the full operation and allocate responsibilities. Planning detail and supervision should match the risks and complexity; complex lifts need appropriately competent planning. [1]



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## 10 Tandem lifting and upending

Complete when two or more cranes/hoists share a load, a load is tailed or rotated, or the centre of gravity/load share changes. Otherwise mark N/A.

### Equipment and roles

Identify each crane/hoist, main and tailing roles, operator positions, lead lifting supervisor and the specialist designer/reviewer.

### Geometry through every stage

Attach stage drawings showing each crane position, hook coordinates, radii, load orientation, centre of gravity and attachment points from initial pick to final support.

### Load sharing and uncertainty

Supply calculated share at each stage, unequal movement effects, centre-of-gravity tolerance, flexibility and load-transfer assumptions. Identify how share will be monitored or verified.

### Capacity and reactions by stage

Provide each crane duty, suspended rigging/hook allowances, governing utilisation, support reactions and applicable manufacturer restrictions or agreed engineering factors.

### Synchronisation and tolerances

Command hierarchy, communication, lift speeds, permissible differential hook movement, allowed tilt, hold points, separation and boom/rope/load collision controls.

### Transfer release and contingency

Sequence for tailing/transfer, unloading an attachment, securing the final position and disconnecting. Describe credible failure/imbalance cases and the agreed safe response.

Do not assume a 50/50 load split or apply an arbitrary extra percentage. The load distribution and operating allowances need an engineering basis for the actual geometry and sequence.



## 11 Special operations and evidence

Identify additional requirements at enquiry stage so specialist input, time and cost can be agreed. This checklist does not make every operation suitable for acceptance.

### Travel tower and fixed equipment

Pick-and-carry route/duty, gradients and tyre/track settings; tower/fixed crane foundations, ties, climbing and erection data; assembly/disassembly lifts and supporting plant.

### Marine offshore and floating work

Vessel/barge stability, mooring, sea state, tidal levels, vessel motions, dynamic load basis, deck capacity and marine authority/operator requirements.

### Persons and confined access

Any lifting of people, personnel carrier, work at height, confined-space entry or rescue requirement. Supply purpose, equipment suitability and specialist safe-system arrangements.

### Demolition extraction and uncertain loads

Breakout/adhesion, embedded or seized parts, cutting sequence, structural instability, residual contents and how the load is made free. State how mass and load path will be verified.

### Temporary works and specialist design

Engineered lifting points, beams, stools, grillage, mats, foundations, temporary bracing or transport frames. Identify designer, checker, design brief and approval interface.

### Standards and acceptance criteria

Site procedures, applicable legislation/jurisdiction, relevant crane/rigging standards, critical-lift criteria, review category, independent check requirements and required document templates.

Tell us what you do not know. Specialist verification, surveys and site attendance are included only where agreed in the written scope; they are not automatically covered by ordering a lift-plan drawing.



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## 12 Deliverables and supporting files

Agree the required outputs and submit current source documents with a clear filename, document number and revision. A marked-up attachment may answer several fields.

### Drawings and model outputs

Select: site/plot plan, crane footprint, side elevation, tackle sketch, lift-path stages, 3D views/model, simulation, transport/setup layout. State paper sizes, scales, dimensions, CAD/BIM formats and project title block.

### Calculations and written pack

Select: duty selection/utilisation, gross suspended load, rigging, clearance, ground/support checks, risk assessment, method statement, inspection checklist, briefing/sign-off sheets. Identify calculations by others.

### Minimum load and site attachments

Load schedule; weight/centre-of-gravity evidence; lifting-point drawings; photos; measured site plan/elevations; services survey; pick/landing coordinates and levels; access and obstruction details.

### Crane rigging and ground attachments

Exact duty chart/OEM output; configuration and hook data; support reactions; rigging list/certificates/instructions; ground report; slab drawings; mat/foundation data and engineering acceptance.

### Management and approval attachments

Site rules; permit requirements; role/competence details; existing plan if revised; relevant inspection/examination records; emergency arrangements; client standards and approval process.

### File register and transfer

List filename/document ID, revision, date and which question it answers. For large or sensitive models, request an agreed secure transfer route; do not send account passwords or access tokens.

Use the open-items register on the next page for anything missing. Provide native files where available as well as readable PDF copies. All dimensions need units and all geometry needs a common datum.



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## 13 Open items and information handover

List unresolved evidence and changes so they remain visible. Copy this page as needed. A blank response does not mean that an item has been verified.

### Open item one

Question/load ID; missing fact or evidence; person/company responsible; due date; impact on planning; document reference when closed.

### Open item two

Question/load ID; missing fact or evidence; person/company responsible; due date; impact on planning; document reference when closed.

### Open item three

Question/load ID; missing fact or evidence; person/company responsible; due date; impact on planning; document reference when closed.

### Changes since the survey or previous plan

Describe any change in plant, load, crane, rigging, location, ground, access, sequence or dates. Identify the affected drawings and who confirmed the change.

### Client information declaration

Name, company, role, date and signature of the person providing the information. Confirm the attached information is current to the best of your knowledge and identify all estimates or unresolved points.

### Return and enquiry reference

Send this saved PDF plus attachments to support@liftplannerpro.co.uk. Email subject: Lift planning enquiry - [project/site]. Enter your enquiry reference and preferred contact time.

The information declaration confirms the handover of data. It is not technical approval of the proposed lift or a substitute for the appointed person and site checks.



# 14 Scope agreement and approval route

Complete the commercial scope before work begins and agree the technical review route before the plan is issued for use.

## Fee and authorised scope

£40 per hour plus VAT. Record agreed tasks, estimated hours, budget cap if agreed, quotation/PO reference and who may authorise additional time or revisions.

## Additional work and arrangements

Record separately agreed site attendance/travel, surveys, specialist design/checking, expenses, delivery dates, revision allowance and payment terms. Do not assume these are included without agreement.

## Client authority to proceed

Authorised name, company, role, signature and date. Identify the accepted written quotation/scope and any commercial conditions still outstanding.

## Technical review and checking

Name the plan preparer, appointed person, independent checker if required, ground/temporary-works reviewer and client/site approver. State review sequence and the evidence each must accept.

## Issue and operational release

Identify the final plan number/revision, approval record, briefing arrangements and person authorising the operation on site. List conditions that must be satisfied before work starts.

## Revision triggers

Agree how altered load, crane duty/configuration, rigging, site levels, ground, weather limits, sequence or personnel are reported and reviewed before continuing.

LPP prepares the agreed planning deliverables for review. A completed intake or CAD simulation does not authorise lifting. The responsible competent people must verify the final arrangement and site conditions before operational release.



## 15 Completion guide and references

Use this page to check the handover. The pack is a client information request; the final engineering scope and required evidence depend on the proposed operation.

### Before sending

Have you identified every load, marked pick/set positions and heights, supplied photos and named the crane supplier, site contact and appointed person? State anything missing.

### Evidence quality

Have you separated verified values from estimates, used consistent units, identified datums and included current document revisions? Record the sources requiring confirmation.

### Approval readiness

Are crane duty, rigging, lifting points, support conditions, operational method and responsible reviewers evidenced? List outstanding conditions to close before final approval.

### Primary guidance

- 1 HSE Planning and organising lifting operations
- 2 HSE Construction lifting operations and crane hire
- 3 HSE Thorough examinations and inspections
- 4 HSE LOLER overview

Select a reference title to open the source. Use current manufacturer instructions and the applicable crane duty alongside site-specific engineering evidence. For inspection and examination requirements, see reference 3; for the general LOLER framework, see reference 4.

Reference guide checked 4 October 2026. Ask the responsible planner which project-specific standards and editions apply. This form does not reproduce a standard or determine compliance on its own.