

CONTRACTOR SCALER HUB · TOOLKIT

Build a Job Workflow From Request to Payment

The course's checklists, worksheets and templates in one file: 3 to print or fill in on your phone, and 2 spreadsheets sent with it.

MotionOps

How to use this toolkit

One file per lesson of **Build a Job Workflow From Request to Payment**, in the order of the course. Each starts with the lesson it belongs to and what to do with it. The tinted rows are the lessons' examples; your numbers go in the blank ones.

Use it lesson by lesson, or go straight to the one you need this week. Nothing here needs an account, and every file says when to check a number with an accountant, an attorney, your licensing board or an insurance agent.

Contents

1 **Request-to-Payment Workflow Map**
Construction Workflow: Map One Job From Request to Final Payment

2 **Office–Field Handoff Checklist**
Office–Field Coordination: A Practical Workflow for Multi-Crew Contractors

3 **Crew Capacity Planner**
Spreadsheet · crew-capacity-planner.xlsx

4 **Change Order Log**
Spreadsheet · change-order-log.xlsx

5 **Job Closeout Checklist**
Job Closeout Process: Close Every Job With Complete Information Before You Invoice

LESSON 1 · CONSTRUCTION WORKFLOW: MAP ONE JOB FROM REQUEST TO FINAL PAYMENT

Request-to-Payment Workflow Map

Trace one job you finished in the last month or two through the nine stages, mark where it waited, then write the one-page map for your team. Do it with the estimator, the office and the crew lead if you can: 30 minutes over one job's timeline.

1. The nine stages

Rename a stage to match your trade, but keep them in order. Change orders run alongside stage 6 and loop back through pricing and approval: keep them as a side loop, not a separate stage. **Every stage needs a "Done when" that can be checked.**

Stage	Starts when	Done when	Our name for it
1. Request	A customer calls, emails or fills in a form	Someone has replied and booked a visit, or said no	
2. Site visit	The visit is booked	Measurements, photos and the customer's goals are written down	
3. Proposal	The site visit is done	The proposal is sent	
4. Approval	The proposal is sent	The customer signs and, if you take one, the deposit is paid	
5. Readiness	The job is approved	Materials are ordered, permits are handled, a crew and start date are confirmed	
6. Work	The crew starts	The work in the approved scope is finished	
7. Closeout	The work is finished	Punch items, photos, time and costs, and every change are recorded	
8. Invoice	Closeout is done	The invoice is sent	
9. Payment	The invoice is sent	The money is in the bank	

2. Trace one real job

JOB

FINISHED ON

PEOPLE IN THE CONVERSATION

DATE WE TRACED IT

- [ ] Dates from emails, texts, the proposal, the schedule, timesheets and the invoice
- [ ] Who actually did each stage on this job, not who's supposed to ("me", "whoever had time" and "nobody" are honest answers)
- [ ] Where the information lived: email, whiteboard, someone's laptop or phone
- [ ] Every wait: a gap between one stage ending and the next starting, and what the job was waiting for

Example from the lesson: the approved job that waited nine days. A deck replacement for a three-crew contractor; the dates are made up to show the method. Readiness, Mar 12 to Mar 21, owner **unclear**: the estimator assumed the office would schedule, the office was waiting for the materials list (9 days). Invoice, Apr 4: waiting for the crew's timesheet and the receipt for extra screws and boards (7 days). The work took five days. The job took six and a half weeks.

Stage	Dates	Who did it	Where it lived	Waited for (days, and why)
1. Request				
2. Site visit				
3. Proposal				
4. Approval				
5. Readiness				
6. Work				
Change orders (side loop)				
7. Closeout				
8. Invoice				
9. Payment				

DAYS THE WORK TOOK

DAYS FROM REQUEST TO PAYMENT

LONGEST WAIT: STAGE AND DAYS

3. Mark the four problems

Problem	How it shows up on the map	What fixes it
No owner	"Unclear," "whoever," or the owner's name on routine work	One named role per stage
No finish line	Nobody can say when the stage was done, so nobody knows when to hand off	A "Done when" that can be checked
Information typed twice	The same details copied from email to whiteboard to invoice	One place where the job lives
Waiting with no date	A gap where the job "was waiting on something"	A time limit on the handoff: "within two working days"

Tick each problem a stage has, then count. **The stage with the most marks, or the longest wait, is where you start.**

Stage	No owner	No finish line	Typed twice	Waiting, no date	Marks
1. Request					
2. Site visit					
3. Proposal					
4. Approval					
5. Readiness					
6. Work					
7. Closeout					
8. Invoice					
9. Payment					

WORST STAGE

SECOND WORST STAGE

4. Write your workflow on one page

Six things per stage. Start with the stages where your map showed a problem; the rest can wait. **One role per stage,** not a department and not "everyone". If the honest answer on a routine stage is the owner, that's a stage to hand off.

Stage	What comes in	Who owns it	Record kept	Done when	Hands off to
Example Approval	Sent proposal	Estimator	Signed proposal, deposit receipt	Signed + deposit paid	Office coordinator, same day
Example Readiness	Signed proposal + materials list	Office coordinator	Purchase order, schedule entry	Materials ordered, start date confirmed with the customer, within 2 working days	Crew lead, 2 days before start
Example Closeout	Finished work	Crew lead	Photos, timesheets, receipts, punch items	All in on the last day of the job	Office coordinator for invoicing

5. Fix your two worst stages

Write them like the lesson's example, then share them with the team.

> EXAMPLE FROM THE LESSON
>
> Readiness is owned by the office coordinator. Done when materials are ordered and the start date is confirmed with the customer, within two working days of the signature. The estimator sends the materials list the same day the proposal is signed.

[STAGE] IS OWNED BY [ROLE]. DONE WHEN [WHAT CAN BE CHECKED], WITHIN [TIME LIMIT]. (WORST STAGE)

SECOND WORST STAGE

- [ ] The map fits on one page
- [ ] It hangs where the office and the crews can see it
- [ ] We walked through it in a team meeting
- [ ] Stages that need more detail got their own checklist (readiness: a job handoff checklist)

What to review: map another job next month and compare

	This job	Next month's job
Stages with no clear owner		
Stages with no finish line		
Days from signature to start		
Days from finished work to invoice		

Office–Field Handoff Checklist

Part 1 is filled in by the office for every job before the crew leaves. Parts 2 to 4 you agree once with the crews and the office, then use on every job for two weeks. Rule one: if it affects the job, it belongs on the job.

1. Before the crew rolls: the handoff checklist

JOB

CREW LEAD

START DATE AND TIME

CHECKED BY, AND DATE

A service call might only need four of these. Cross out what your jobs don't need; **the crew shouldn't discover on site something the office could have told them before the truck left.**

Item	What it means	On the job	Notes
Approved scope, latest version	What's included and what isn't, including every approved change		
Customer and site contacts	Who to call on site, and who decides if something comes up		
Access	Gate codes, keys, parking, pets, hours the crew can work		
Schedule	Start date and time, expected duration, other trades on site		
Materials	What's delivered, what's on the truck, what's being picked up and where		
Customer decisions	Selections, colors, models, locations, written down, not remembered		
Documents and photos	Plans, permits, photos from the site visit		
Update triggers	What the crew must report, and when (part 2)		
Open items	Anything still unresolved, and who's resolving it		

2. Update triggers: when the field updates the office

Routine updates, quick and the same on every job:

- [ ] On the way
- [ ] Work started
- [ ] On site
- [ ] Work finished

Exception updates, only when they happen. This is where the office has to act.

- [ ] The scope changes or the customer asks for something extra
- [ ] The job will run long enough to affect the next appointment
- [ ] Another visit will be needed
- [ ] A safety issue or property damage
- [ ] An unexpected condition the office or the customer needs to know about (with a photo)

OTHER TRIGGERS FOR OUR WORK

Give photos a job too. "Take pictures" isn't a rule: say which photos matter, and keep them on the job, not in someone's camera roll.

> **Examples from the lesson:** a remodeler might want existing conditions before demolition, progress before work gets covered, and the finished work. An HVAC contractor might want the old equipment, model and serial numbers, and the installed system.

THE PHOTOS OUR CREWS TAKE ON EVERY JOB

3. Who acts on each update

Information alone doesn't move a job. Write who acts on each kind of update, so nobody has to ask: "Was I supposed to do something about this?"

Update	Who acts	What they do
Example Unexpected condition, extra work needed	Estimator or manager	Prices the change and decides the scope
Example Job running long	Dispatcher or office coordinator	Protects the next appointment, tells the next customer
Example Change affects time or cost	Office	Tells the customer and gets the approval recorded
Example Field condition	Technician	Documents it accurately, with photos

4. What goes up the chain, decided before it happens

If everything gets escalated, the owner becomes the company's switchboard. The lesson's examples are in the middle column; write your own rule on the right.

Who handles it	Example from the lesson	Our rule
The crew handles it	A small site condition within the approved scope, a short delay that doesn't affect the next appointment	
Goes to the office or dispatch	A delay that threatens the next appointment, a missing part, a customer question about timing	
Goes up immediately	Work outside the approved scope, a safety issue, significant property damage, a customer dispute, anything likely to add substantial cost	

5. The last five minutes on site: the end-of-visit note

Before closing the job, leave a note someone who wasn't there could understand. Not an essay. If follow-up is needed, say so and say who's doing it.

> EXAMPLE FROM THE LESSON
>
> Arrived for intermittent no-cool. Found failed capacitor. Replaced and tested the system; temperature split normal after repair. Told the customer the condenser fan motor is showing wear. Photos attached. No follow-up needed.

> THE PATTERN TO COPY
>
> Arrived for [the problem]. Found [what you found]. [What you did, and how you checked it]. Told the customer [anything they should know]. Photos attached. Follow-up: [none / what, who, by when].

6. Find where your handoffs leak

Take five recent jobs and trace the information from start to finish. Count the jobs where somebody had to ask each question, and write what was missing. **Fix the ones that show up more than once.**

Question someone had to ask	Jobs (of 5)	What was missing: checklist item, update trigger or owner
"What's the gate code?"		
"Did we order that part?"		
"Who's going back tomorrow?"		
"Did the customer approve this?"		
"Why is this crew still there?"		
"Do we have a photo of what it looked like before?"		

What to review: two weeks before, two weeks after

Per job	2 weeks before	2 weeks after
Clarification calls		
"The crew didn't have it" moments		

LESSON 3 · SPREADSHEET · CREW-CAPACITY-PLANNER.XLSX

Crew Capacity Planner

Spreadsheet crew-capacity-planner.xlsx came with this toolkit. Open it in Excel, Numbers or Google Sheets (File > Import). Yellow cells are yours to type; gray cells calculate. This page says what is in it.

Step 1: next week's jobs

Run it every Thursday, before you confirm next week's dates. The example is the lesson's week before the check, made up to show the method: three crews, only crew 1 has a tile setter. Days left to place: a date to give the customer now.

Step 2: place each crew day

One row per crew, per day, per job: a crew on two jobs the same day gets two rows, and the sheet marks it. Use the crew names from Week by crew.

Steps 3 and 4: the week by crew, overloads and gaps

Available days: working days next week, minus time off and days taken by a job running long. Each day counts the crew's jobs: 0 is open, 2 or more is an overload.

Steps 5 and 6: resolve overloads, fill gaps

Resolve each overload before you confirm dates, then fill the gaps from the ready backlog. The example rows are how the lesson resolved its week.

- Conflicts and how we resolved them
- The ready backlog: small, ready-to-go work for delay days

What to review each week

A crew costs the same whether it's building or waiting on a delivery.

- What a lost crew day costs
- Per crew, per week
- For the whole schedule, per week

LESSON 4 · SPREADSHEET · CHANGE-ORDER-LOG.XLSX

Change Order Log

Spreadsheet change-order-log.xlsx came with this toolkit. Open it in Excel, Numbers or Google Sheets (File > Import). Yellow cells are yours to type; gray cells calculate. This page says what is in it.

Every change and its status

One list per job or for the whole company: every change and its status. Review it once a week. The example rows are the lesson's, made up; their dates fall in one example week. No work before approval: a verbal yes is not a change order. No change without a status: waiting for approval, approved and not yet billed, billed, no charge on purpose, or declined.

- This week's review
- The log: request, impact, approval, records, billing

The five steps for every change

Pick your most common kind of change (extras the customer asks for on site, usually) and write who does each step, and who may approve up to what amount. Write it down so the crew isn't guessing. Put one sentence in your contract: any work beyond the agreed scope will be documented, priced and signed before it's done.

- Who does each step, and up to what amount
- The changes that are easiest to miss: each one is a change order
- What to say: matter-of-fact, no apology

LESSON 5 · JOB CLOSEOUT PROCESS: CLOSE EVERY JOB WITH COMPLETE INFORMATION BEFORE YOU INVOICE

Job Closeout Checklist

One per job, between "the crew is done" and "the invoice goes out". The crew lead runs part 1 on the last day, before leaving; the office runs part 2 before it invoices.

JOB

LAST DAY OF WORK

FIELD PART: CREW LEAD

OFFICE PART: OFFICE COORDINATOR, WITHIN ____ WORKING DAYS

1. Field part: before the crew leaves

Check	What complete means	Done	Notes
Work status	Everything in the approved scope is finished, or the open items are listed below with a date and a person		
Evidence	Finished-work photos on the job; the customer's sign-off, if you take one		
Time	Every hour on the job is on a timesheet, including the last day		
Materials and costs	Every receipt, return and rental for the job is recorded		
Changes	Ask the crew lead: "Did you agree to anything with the customer that isn't written up?" Anything agreed on site is written up and signed before the crew leaves		

Open item: a date and a person on every one	Who	By when
Example Install the replacement cabinet door when it arrives (on back order)	Crew 2	Next week

2. Office part: changes and invoice

This is where unbilled money hides. Compare the change order log with the job's notes, photos and the crew lead's answer above. Every change is signed, then either on the invoice or marked no charge on purpose.

Change	Found in: log, notes, photos, crew lead	Signed	On the invoice or no charge	Amount
Example One outlet by the island, under the crew lead's limit, not written up	Crew lead, Friday: written up and signed on the spot	Fri	On the invoice	
Example Half a day of extra prep, wall in poor condition	Agreed by text only: office wrote it up	Mon	On the invoice	

Invoice ready: the amount matches the original scope plus approved changes, minus deposits already paid.

	Amount
Original scope	
+ Approved changes	
- Deposits and progress payments already paid	
= Invoice amount	

- [ ] Every change order signed
- [ ] Every change on the invoice or marked no charge
- [ ] Every receipt, return and rental in the job's costs
- [ ] Deposits and progress payments taken off
- [ ] Return visits or warranty items scheduled
- [ ] Signed changes attached to the invoice
- [ ] Invoice sent on: _____

YOUR TRADE'S OWN CLOSEOUT DOCUMENTS (PERMITS CLOSED, WARRANTIES REGISTERED, MANUALS HANDED OVER)

3. Close the loop: actual costs against the estimate

While the numbers are fresh. You don't need a full analysis for every job; one line on the job is enough.

	Estimated	Actual	Difference
Hours			
Materials			

Example from the lesson: "Prep took a day longer than estimated, wall in poor condition." Over a few months, those lines show which estimates keep running short.

ONE LINE FOR THIS JOB

What to review: every job that finishes in the next two weeks

Job	Last day of work	Invoice-ready	Days	Reached the office missing: time, receipts, change orders	Changes found at closeout, not on the first invoice draft

CONTRACTOR SCALER HUB · TOOLKIT

Back to the course

Every file in this toolkit follows a lesson of **Build a Job Workflow From Request to Payment** on the Contractor Scaler Hub: when a lesson's example changes, its file changes too. Reread the lesson when a file asks for a number you do not have yet.

All six courses: **motionops.com/scaler-hub**

Spreadsheets in this toolkit

- **Crew Capacity Planner**: crew-capacity-planner.xlsx
- **Change Order Log**: change-order-log.xlsx

See every job in one system

Book a demo. A MotionOps specialist shows you how your office and crews run every job in one place, from the first request to the final payment. **motionops.com/demo**