MotionOps

CONTRACTOR SCALER HUB · BUILD A JOB WORKFLOW FROM REQUEST TO 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		