MotionOps

CONTRACTOR STARTER HUB · RUN YOUR FIRST JOBS

# Job Closeout Checklist

One per job, from the final walkthrough to the closed file. The goal: a short, agreed list with a name and a date on every item, then a final invoice that gets paid.

## 1. Book the final walkthrough

JOB

DATE AND TIME (A REAL APPOINTMENT, NOT THE LAST DAY WHILE LOADING)

DECISION-MAKERS ATTENDING (BOTH, IF TWO PEOPLE OWN THE HOUSE)

ORDER I'LL WALK: ROOM BY ROOM OR ZONE BY ZONE

## 2. At the walkthrough

- [ ] Both decision-makers present
- [ ] Full walkthrough in a fixed order, all rooms and exterior areas
- [ ] Every item written down on the spot, in plain language, in front of them
- [ ] Photos of anything ambiguous
- [ ] Out-of-scope requests identified and priced separately
- [ ] A date assigned to every punch item
- [ ] Verbal confirmation that the list is complete
- [ ] List sent in writing the same day, confirmation requested
- [ ] Final invoice terms restated
- [ ] Warranty start date and coverage explained
- [ ] Manuals, keys, paint codes and closeout documents handed over

WHEN THEY ADD SOMETHING THAT ISN'T YOURS: SAY IT ON THE SPOT

That one's outside what we contracted for. Happy to price it separately if you want it done.

TO CLOSE THE LIST, AT THE END OF THE WALKTHROUGH

This is the full list. Once these are done, the job's complete and the final invoice is due.

## 3. The punch list

**One item per line, a name and a date on every item.** Write each one so a crew member who wasn't there can act on it, and add a photo to anything that could be argued about later.

| #, location | What to do | Who | By | Photo | Done |
|---|---|---|---|---|---|
| **Example** 1. Master bath | Touch up paint above door casing, 2 spots | Painter | Sept 12 | | |
| **Example** 2. Kitchen | Reinstall cabinet pull on drawer 3, currently misaligned | Carpenter | Sept 12 | | |
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| | | | | | |

LIST SENT IN WRITING ON

CUSTOMER CONFIRMED ON

**Not punch list items:** anything outside the original scope (that's a change order), work redone because the customer changed their mind on something they signed off on, damage from another trade or the homeowner after your crew left, anything you excluded in your proposal.

## 4. Put punch work on the schedule

Group the items by who does them: each trade is its own trip. If an item isn't on the schedule with a name, it won't happen this week.

| Who | Items # | Scheduled for |
|---|---|---|
| | | |
| | | |
| | | |

## 5. Substantial completion

It usually triggers the final payment or retainage release, the start of your warranty period, the end of your liability for the site, and any liquidated damages clauses in your contract.

- [ ] My contract defines substantial completion. If it doesn't, one sentence is enough: **"Substantial completion occurs when the work is usable for its intended purpose, with only punch list items outstanding."**

SUBSTANTIAL COMPLETION DATE

WARRANTY STARTS ON

## 6. The closeout file, before the job leaves your desk

- [ ] Signed punch list, with completion dates
- [ ] Final signed change orders
- [ ] Final invoice and payment record
- [ ] Before, during and after photos, including anything you covered up
- [ ] Warranty start date and what's covered
- [ ] Material specs, paint codes, model and serial numbers
- [ ] Permits and inspection sign-offs
- [ ] Lien waivers, where they apply
- [ ] **Actual costs against your estimate**

## 7. Learn from the job: a 15-minute review

Once the file is closed, the same week, while you still remember the job.

| | Estimated | Actual | Difference |
|---|---|---|---|
| Hours | | | |
| Travel and supply runs | | | |
| Materials | | | |

ONE THING TO CHANGE, IN MY NEXT ESTIMATE, MY PREP OR HOW I TALKED TO THE CUSTOMER (COPY IT TO MY RUNNING LESSONS LIST, READ BEFORE PRICING A SIMILAR JOB)

- [ ] Asked for a review
- [ ] Asked permission to use the photos on my website and profile; answer kept in writing
- [ ] Asked for a referral
- [ ] Check-in on my calendar for about 30 days later: _____

ASK FOR A REVIEW

Would you leave an honest Google review? It really helps a small business like mine.

ASK FOR A REFERRAL

If you know anyone who needs similar work, I'd appreciate it if you passed my name on.

CHECK-IN, ABOUT 30 DAYS LATER

Hi [Name], it's been about a month since we finished your [kitchen]. Is everything holding up well? If anything needs attention, just let me know.