DRAFT — PENDING OPERATOR REVIEW

Office Bidding and Pre-Construction Workflow

Starts when a new opportunity and the owner's drawing set reach the office. The office screens the job, builds a budget from past unit costs, and presents one lump-sum price in person. A signed agreement (or a verbal yes from a repeat developer) opens paid pre-construction: permit, sub bids, selections, final budget. Ends when the construction agreement is signed with final dollar amounts.

TRIGGER
Starts when a new opportunity and the owner's drawing set reach the office

→

END STATE
Ends when the construction agreement is signed with final dollar amounts

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Opportunity Intake and Evaluation
PRINCIPAL

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1 Opportunity Intake and Evaluation

PRINCIPAL

PROCESS 1.1

Opportunity Intake Process

ROLE	TRIGGER	END STATE
Principal	Starts with a call from a prospect or a repeat developer	Ends when the drawings are in hand and the super knows a job is coming

- 1.1.1 **Collect the opportunity details and architectural drawing set from the owner** — OPPORTUNITY INTAKE

  Trigger → Prospect or repeat developer makes contact   End → Drawing set received and filed in Google Drive with its development level known

  - Receive inbound opportunity call from prospect or developer
  - Record the drawing set development level for downstream bidding

- 1.1.2 **Notify the superintendent of the incoming opportunity in person** — OPPORTUNITY INTAKE

  Trigger → Opportunity arrives in the office   End → Superintendent aware a project is coming

- 1.1.3 **Provide preliminary pricing and value engineering during design** — BUDGET ESTIMATING

  Trigger → Repeat developer brings Slate in during architectural design   End → Design aligned with the developer's intended budget before formal bidding

PROCESS 1.2

Opportunity Evaluation Process

ROLE	TRIGGER	END STATE
Principal	Starts when the drawing set arrives	UNKNOWN — *not in source*

1.2.1 Screen the opportunity against the selection criteria

OPPORTUNITY SCREENING

Trigger → Drawing set received   End → Go or no-go decision made on the opportunity

- Review drawings against target project type and geography
- Compare the project start date against superintendent capacity
- Assess repeat-work potential across the client's property pipeline
- Assess developer temperament and relationship durability

+1 MORE IN SOP

1.2.2 Document the opportunity evaluation criteria as a scored screen

OPPORTUNITY SCREENING

GAP Trigger → UNKNOWN — *no trigger defined; the codified screen does not exist yet*   End → Written screen that another person can apply to an incoming opportunity

1.2.3 Record the declined opportunity and notify the prospect

OPPORTUNITY SCREENING

GAP Trigger → UNKNOWN — *no trigger defined; the decline step is unmapped*   End → Decline reason recorded against the opportunity and the prospect answered

2 Historical Budget Development

PRINCIPAL + OFFICE MANAGER

PROCESS 2.1

Job Workspace Setup Process

ROLE	TRIGGER	END STATE
Principal	Starts with the go decision	Ends when the job has its own budget workbook and project

- **2.1.1 Duplicate the master budget template for the job** — JOB SETUP
  Trigger → Opportunity accepted   End → Job-specific budget workbook created from the master template
- **2.1.2 Create the job project from the new-construction template** — JOB SETUP
  Trigger → Opportunity accepted   End → Job project created and renamed from the template
- **2.1.3 Capture plan-review questions as tasks in the job project** — JOB SETUP
  Trigger → Job project created   End → Open plan questions captured as tasks
- **2.1.4 Create the client-facing job project for owner and design team access** — JOB SETUP
  Trigger → Internal job project created   End → Client-facing job project created and shared with the owner and design team

Historical Budget Development

PRINCIPAL + OFFICE MANAGER

continued

PROCESS 2.2

Budget Build and Specification Process

ROLE
Principal

TRIGGER
Starts when the job budget workbook exists

END STATE
UNKNOWN — *not in source*

- **2.2.1** Take off quantities from the drawings by line item — BUDGET ESTIMATING
  Trigger → Job budget workbook created End → Job quantities established for every priced line item

- **2.2.2** Enter quantities into the bid sheet tab of the master budget — BUDGET ESTIMATING
  Trigger → Job quantities established End → Budget populated from historical unit costs

- **2.2.3** Apply placeholder unit allowances for unselected finishes — BUDGET ESTIMATING
  Trigger → Budget populated from historical unit costs End → Every unselected finish carries a placeholder allowance

- **2.2.4** Draft the specification one-pager with inclusions, assumptions, and lump sum — BUDGET ESTIMATING
  Trigger → Budget populated and allowances applied End → One-pager states coverage and assumptions and carries a single lump-sum price
  Add the lump-sum price to the specification one-pager

- **2.2.5** Add a disclosed contingency line to the budget — BUDGET ESTIMATING
  GAP Trigger → UNKNOWN — *no trigger defined; the contingency line does not exist yet* End → Budget carries a named contingency line sized against project risk

- **2.2.6** Review the budget with a second reviewer before presenting it — BUDGET ESTIMATING
  GAP Trigger → UNKNOWN — *no trigger defined; the review step does not exist yet* End → Second reviewer has signed off on quantities, allowances, and assumptions

2 Historical Budget Development

PRINCIPAL + OFFICE MANAGER

PROCESS 2.3

Historical Cost Refresh Process

ROLE	TRIGGER	END STATE
Office Manager	Starts when a project finishes, outside this workflow	Ends when the masters reflect the finished job

- 2.3.1 Update master budget line items where cost variation was observed — COST MAINTENANCE
  Trigger → A project completes End → UNKNOWN — *source does not define what counts as variation or when the refresh is complete*

- 2.3.2 Define the trigger and cadence for the historical cost refresh — COST MAINTENANCE
  GAP Trigger → UNKNOWN — *no trigger defined; the refresh rule does not exist yet* End → Written refresh rule naming the triggering event and the variance threshold

3 Budget Presentation and Agreement

PRINCIPAL

PROCESS 3.1

Budget Presentation and Agreement Process

ROLE
Principal

TRIGGER
UNKNOWN *— not in source*

END STATE
Ends when the agreement is signed and paid, or a repeat developer commits verbally

3.1.1 Present the budget one-pager to the owner in person

CLIENT PRESENTATION

Trigger → One-pager ready to send   End → Owner has the lump-sum figure and has confirmed it is workable or named the gap

- Schedule the in-person budget meeting with the owner
- Walk the project considerations and milestones with the owner
- Present the lump-sum budget figure to the owner
- Confirm the figure against the owner's expected budget

3.1.2 Send the unpriced construction agreement to the owner for legal review

CONTRACT ADMINISTRATION

Trigger → Owner confirms the figure is workable   End → Unpriced construction agreement in the owner's hands for legal review

3.1.3 Send the pre-construction agreement to the owner for signature

CONTRACT ADMINISTRATION

Trigger → Owner confirms the figure is workable   End → Pre-construction agreement signed and returned, or waived for a repeat developer

3.1.4 Invoice the pre-construction fee and email it to the owner

CONTRACT ADMINISTRATION

Trigger → Pre-construction agreement issued   End → Pre-construction fee invoiced and paid

3.1.5 Record the owner's authorization to spend subcontractor time

CONTRACT ADMINISTRATION

GAP

Trigger → UNKNOWN *— no trigger defined; the authorization record does not exist yet*   End → Authorization to spend subcontractor time recorded on the job, by agreement or by logged verbal commitment

Budget Presentation and Agreement

PRINCIPAL

continued

PROCESS 3.1

Budget Presentation and Agreement Process (continued)

ROLE
Principal

TRIGGER
UNKNOWN — *not in source*

END STATE
Ends when the agreement is signed and paid, or a repeat developer commits verbally

○ 3.1.6 Confirm allowances with the owner in a signed allowance schedule

CONTRACT ADMINISTRATION

GAP Trigger → UNKNOWN — *no trigger defined; the allowance schedule does not exist yet* End → Owner-signed allowance schedule listing every allowance category, amount, and selection deadline

4 Permitting and Project Release

PRINCIPAL

PROCESS 4.1

Permit Submission Process

ROLE	TRIGGER	END STATE
Principal	Starts with the signed agreement, once the plans are far enough along	Ends when the permit is approved, though dirt may move when approval is about a week out

4.1.1 Submit the plan set to the city for review

PERMIT COORDINATION

Trigger → Pre-construction agreement signed   End → Plans submitted and under city review with fees paid and carried for reimbursement

> Pay the city plan review fees and add them to the construction budget

4.1.2 Route city review comments to the architect for drawing updates

PERMIT COORDINATION

Trigger → City returns review comments   End → Architect has the comments and issues updated drawings

4.1.3 Track the city plan review cycle to approval

PERMIT COORDINATION

GAP

Trigger → Plans submitted and under city review   End → Permit status visible and tracked to approval

PROCESS 4.2

Drawing Refinement Process

ROLE	TRIGGER	END STATE
Principal	Starts with the signed agreement when the budget was priced off a design set	Ends when the drawing basis for sub pricing is settled

- **4.2.1 Require a permit or bid set from the owner before soliciting subs** — DRAWING COORDINATION
  Trigger → Pre-construction agreement signed on a design development set   End → Refined permit or bid set received from the owner

- **4.2.2 Substitute detailed scopes of work for the refined drawing set** — DRAWING COORDINATION
  Trigger → Schedule pressure makes waiting for the refined set unacceptable   End → Scopes carry the detail the drawings omit and solicitation can proceed

- **4.2.3 Track the refined drawing set request to receipt** — DRAWING COORDINATION
  GAP
  Trigger → Refined drawing set requested from the owner   End → Outstanding drawing request visible with an expected date

PROCESS 4.3

Field Release Process

ROLE	TRIGGER	END STATE
Principal	Starts when plans go to the city	Ends when the super starts the schedule

- 4.3.1 **Authorize the start of pre-construction work** — FIELD RELEASE
  Trigger → Plans submitted to the city   End → Superintendent has authorization to start on the job

- 4.3.2 **Release the budget and plan set for schedule build-out** — FIELD RELEASE
  Trigger → Superintendent has authorization to start   End → Superintendent holds the budget and plans and has started the schedule

- 4.3.3 **Define the office-to-field handoff artifact and acceptance criteria** — FIELD RELEASE
  GAP Trigger → UNKNOWN — *no trigger defined; the handoff artifact does not exist yet*   End → Written release listing plan set, budget, permit status, and what the field owns

5 Subcontractor Solicitation and Award

PRINCIPAL

PROCESS 5.1

Scope of Work Preparation Process

ROLE	TRIGGER	END STATE
Principal	Starts when the drawing basis is settled	Ends when every trade that needs a scope has one and the roster is set

- **5.1.1 Select the trades that require a formal scope of work** — SCOPE DEFINITION
  Trigger → Drawing basis for pricing settled End → List of trades requiring a formal scope of work set for the job
- **5.1.2 Adapt the master scope of work per trade** — SCOPE DEFINITION
  Trigger → Trades requiring a formal scope identified End → Trade-specific scope of work drafted for each selected trade
- **5.1.3 Update the bid tracking sheet with the job's subcontractor roster** — SCOPE DEFINITION
  Trigger → Trade scopes drafted End → Job subcontractor roster set on the bid tracking sheet

PROCESS 5.2

Bid Solicitation Process

ROLE	TRIGGER	END STATE
Principal	Starts when scopes are done	Ends when every solicited scope has a price back

- 5.2.1 Email the scope of work and plan set to each selected subcontractor — BID MANAGEMENT
  Trigger → Trade scopes drafted and roster set End → Every selected subcontractor has the scope, the plans, and a bid due date
- 5.2.2 Track bid request status per subcontractor on the bid tracking sheet — BID MANAGEMENT
  Trigger → Bid requests sent End → Every solicited scope shows a current status on the tracking sheet
- 5.2.3 Solicit competing bids on high-variance scopes — BID MANAGEMENT
  Trigger → Friction with an incumbent trade or a decision to trial a new contractor End → Two or three prices in hand for the contested scope

Subcontractor Solicitation and Award

PRINCIPAL

PROCESS 5.3

Bid Award Process

ROLE
Principal

TRIGGER
Starts when sub prices come back by email

END STATE
Ends when awarded subs have signed their scopes

- ● 5.3.1 **Compare returned bids and alternates for the same scope** — BID MANAGEMENT
  Trigger → Subcontractor prices returned   End → Awarded contractor chosen for each contested scope

- ● 5.3.2 **Complete the scope of work and send it to the awarded subcontractor for signature** — BID MANAGEMENT
  Trigger → Awarded contractor chosen   End → Signed scope of work on file for the awarded contractor

- ● 5.3.3 **Collect a signed master subcontractor agreement from new subcontractors** — BID MANAGEMENT
  Trigger → A contractor new to Slate is awarded a scope   End → Master subcontractor agreement signed and filed in Google Drive

- ○ 5.3.4 **Level returned bids for scope inclusions and exclusions** — BID MANAGEMENT
  GAP Trigger → UNKNOWN *— no trigger defined; the leveling step does not exist yet*   End → Every returned bid normalized to the same inclusion list with scope gaps assigned

- ○ 5.3.5 **Verify subcontractor insurance and license currency before award** — BID MANAGEMENT
  GAP Trigger → UNKNOWN *— no trigger defined; the verification step does not exist yet*   End → Current insurance certificate and license on file for every awarded subcontractor

6 Selections and Material Pricing

PRINCIPAL

PROCESS 6.1

Owner Selections Process

ROLE	TRIGGER	END STATE
Principal	Starts with unselected finishes after the budget meeting	Ends when real pricing for every pick is in the final budget

- **6.1.1 Route the owner to supplier showrooms for unselected finishes** — SELECTIONS COORDINATION
  Trigger → Finishes remain unselected after the budget meeting End → Owner has made their selections at the supplier
- **6.1.2 Send actual quantities to the supplier for a re-quote** — SELECTIONS COORDINATION
  Trigger → Owner has made their selections End → Supplier has actual quantities and is re-quoting
  Receive the supplier selection sheet priced at quantity one
- **6.1.3 Enter the re-quoted supplier pricing into the final budget** — SELECTIONS COORDINATION
  Trigger → Supplier returns the re-quote End → Placeholder allowance replaced with real supplier pricing

PROCESS 6.2

Material Takeoff Process

ROLE	TRIGGER	END STATE
Principal	Starts when scopes go out	Ends when Slate-supplied quantities are priced for the final budget

- **6.2.1 Perform refined takeoffs on Slate-supplied materials** — MATERIAL ESTIMATING
  Trigger → Scopes of work sent to subcontractors End → Slate-supplied material quantities established and priced for the job
- **6.2.2 Divide the material takeoffs by available office capacity** — MATERIAL ESTIMATING
  Trigger → Material takeoffs required and office capacity available End → Takeoff work divided and assigned

7 Final Budget and Contract Execution

PRINCIPAL

PROCESS 7.1

Final Budget Assembly Process

ROLE	TRIGGER	END STATE
Principal	Starts when all sub bids, supplier quotes, and priced takeoffs are back	Ends when the owner accepts the number; how that happens is unknown (see 7

- **7.1.1 Consolidate returned sub bids and supplier quotes into the final budget** — BUDGET ESTIMATING

  Trigger → All subcontractor bids and supplier quotes returned   End → Final budget reflects real prices for every line item and the gap against the owner's ceiling is quantified

  Compare the final budget against the owner's budget ceiling

- **7.1.2 Reduce cost by revising selections before pressing subcontractors** — BUDGET ESTIMATING

  Trigger → Final budget exceeds the owner's ceiling   End → Final budget brought within the owner's ceiling

- **7.1.3 Present the final budget to the owner for acceptance** — BUDGET ESTIMATING

  GAP

  Trigger → Final budget brought within the owner's ceiling   End → Owner has accepted the final budget and the acceptance is recorded

Final Budget and Contract Execution

PRINCIPAL

continued

PROCESS 7.2

Contract Execution Process

ROLE	TRIGGER	END STATE
Principal	Starts when the owner accepts the final budget	Ends when the owner signs

- ● 7.2.1 **Fill the final dollar amounts into the construction agreement** — CONTRACT ADMINISTRATION
  Trigger → Final budget accepted by the owner   End → Construction agreement carries the final contract amounts
- ● 7.2.2 **Obtain the owner's signature on the construction agreement** — CONTRACT ADMINISTRATION
  Trigger → Construction agreement carries the final contract amounts   End → Construction agreement executed by the owner
- ○ 7.2.3 **Track the construction agreement to execution** — CONTRACT ADMINISTRATION
  GAP
  Trigger → Construction agreement issued for legal review   End → Contract status visible from issue through execution

Notes & Assumptions

NOTES & ASSUMPTIONS

Sources and confidence

- Main source: the 2026-07-21 office and bidding session (OFF-F1 to OFF-F78). High confidence.
- Business context: the 2026-05-19 discovery conversation (DISC-F6, F7, F11, F12, F14, F15).
- Tool changes: the 2026-08-11 tech-stack session (STACK-F5 to F31). JobTread and Quo were confirmed by Patrick on 2026-08-25.
- Field-side evidence: Tom Kirk, 2026-08-05 (TOM-F4 to F8, F11, F12, F48) and Connor Fields, 2026-08-06 (CON-F2 to F8).
- Transcripts garble product names. Clean names are used: Asana, Instagantt, JobTread, Quo, Adaptive, Granola, ConX under Houzz, Buildertrend, OG&E.
- 41 active where the work happens today, 14 gap where a step should exist and does not.

Why the reduction is below the typical band

Some work in this map also appears in other maps.

OPERATOR QUESTIONS

1. **Phase 7:** Is the signed construction agreement the single end of this workflow?
2. [P1-P7] Do we split this at the pre-construction agreement, with Phases 1 to 3 as unpaid bidding and 4 to 7 as paid pre-construction?
3. [P2, P5] Who owns the budget, scopes, bid requests, and the schedule, and when does a super step in?
4. **Phase 2:** Should the cost refresh run at project close on every line that missed the estimate by more than a set percentage?
5. **Phase 3:** On repeat-developer jobs, is the owner's verbal yes at the budget meeting the go-ahead to spend sub time?
6. **Phase 3:** Is there a set path when the presented number is far above the owner's ceiling?
7. **Phase 4:** Should the office own permit tracking as a status field on the job?
8. **Phase 4:** Is it true that the office chases the refined drawing set and the wait has no limit today?
9. **Phase 4:** Should the field release become a written list (plans, budget, permit status, what the field owns) that the super confirms in writing with a schedule due date?
10. **Phase 5:** Is price variance the whole rule for which trades get a formal scope?
11. **Phase 6:** Is the split that the office manager takes repeatable takeoffs and the principal keeps the judgment-heavy ones?
12. [P2, P3] Should QuickBooks be added as the accounting system behind Adaptive?
13. **Phase 1:** Should writing down the opportunity screen stay out of scope for now?
14. **Phase 2:** Is the spec one-pager a template today?
15. **Phase 1:** Should the super-capacity check be its own activity instead of a line inside the screen?
16. **Phase 1:** Should design-phase pricing be mapped as its own process at the front of Phase 1?

Notes & Assumptions (continued)

NOTES & ASSUMPTIONS

Old-to-new activity map

DRAFT	FINAL	NOTE
1.1.1 to 1.1.3; 1.1.4	1.1.1; 1.1.2	M1
1.2.1 to 1.2.5; 1.2.6	1.2.1; 1.2.2	M2
2.3.1, 2.3.2; 2.4.x	2.2.4; 2.3.x	M3, process merge and renumber
3.1.1 to 3.1.4; 3.2.1 to 3.2.3	3.1.1; 3.1.2 to 3.1.4	M4, process merge and renumber
4.1.1, 4.1.2; 4.1.3, 4.1.4	4.1.1; 4.1.2, 4.1.3	M5
6.1.2, 6.1.3; 6.1.4	6.1.2; 6.1.3	M6
7.1.1, 7.1.2; 7.1.3	7.1.1; 7.1.2	M7
(new)	1.1.3, 1.2.3, 2.1.4, 2.2.5, 2.2.6, 3.1.5, 3.1.6, 5.3.4, 5.3.5, 7.1.3	Added; all other numbers unchanged

Structure notes

- **One owner.** Almost everything is done by the Principal. Phase breaks mark real gates, not changes of hands.
- **Where work changes hands:** Owner (Phases 3 and 4), subs and suppliers (5 and 6), Office Manager (6.2), super (4.3).
- **The super's workflow starts in Phase 4** and runs alongside Phases 5 to 7.
- **Phase 3 has one process.** It stays a phase because it holds the money line.
- **Phases 1 to 3 are unpaid; 4 to 7 are paid.** See question 2.
- **One bid sheet.** The Phase 2 budget and the Phase 7 final budget are the same tab at two points in time.
- **Phase 6 runs alongside Phase 5.** Ops map is sequential, so they are listed in order.
- **Shared processes:** 2.1, 2.3, 4.3, 5.2, 6.2, 7.2 (rows 1 to 6 in `_process-registry.md`). Unhappy paths are thin; see questions 6 to 8.

OPERATOR QUESTIONS

17. **Phase 7:** Does a final budget review with the owner happen before the contract amounts are filled in?
18. [P6, P7] Does whoever runs a takeoff also price it and enter it into the final budget?
19. **Phase 1:** Is a declined opportunity recorded anywhere today?
20. [P2, P3] Should allowances become a signed exhibit with amounts by category and a selection deadline?
21. **Phase 2:** Should the budget carry a visible contingency line?
22. **Phase 2:** Should a second person, likely the office manager, review the budget before it is presented?
23. **Phase 5:** Do returned bids get checked against each other for scope gaps today?
24. **Phase 5:** Is sub insurance and license re-verified on each job today?

Notes & Assumptions (continued)

NOTES & ASSUMPTIONS

Assumptions to verify

- **Role names.** `Principal` is the business owner. `Owner` is the client. Superintendent maps to Site Supervision. Confirmed once, in the Field Execution map (question 4).
- **The office manager is a single point of failure on cost data.** One person keeps the unit costs every budget is built from.
- **Acceptance is mostly undefined.** Nobody has said how the owner accepts the one-pager, what opens paid work for repeat developers, or how the super confirms the field release.
- **Budget ownership.** Budget and scope ownership is unclear. Patrick says he does nearly all of it. Tom says he did it on one live job. See question 3.
- **Sub-functions are tentative.** Fourteen across 55 activities; largest are Budget Estimating (10), Contract Administration (8), Bid Management (8).
- **Estimating volume.** About five bids a year against seven to eight jobs finished, so some repeat jobs may skip full bidding. Unresolved.

Rule deviations

[Rule deviation] Twelve activity titles name the person receiving something (1.1.2, 2.1.4, 3.1.2, 3.1.3, 3.1.4, 3.1.6, 4.1.2, 4.2.1, 5.3.2, 6.1.1, 7.1.3, 7.2.2). Eleven name an outside party; 1.1.2 names the super. Accepted, following the Paxus maps.

[Rule deviation] Phase breaks mark gates, not changes of hands, because one role does nearly everything. Accepted.

[Rule deviation] The release to the super is written in Phase 4 (the sending side) because the receiving side lives in another map. Accepted.

Notes & Assumptions (continued)

NOTES & ASSUMPTIONS

Tool transitions

TOOL IN THIS WORKFLOW	WHERE IT APPEARS	DECIDED TARGET	STATUS
Asana	Job project, tasks, schedule template (2.1.2, 2.1.3, 4.3.2)	JobTread	Decided. Running jobs finish in Asana
Instagantt	Schedule editing (4.3.2)	JobTread Gantt	Decided. Retires with Asana
Excel and Google Sheets	Master budget, bid tracking, sub database (2.1.1, 2.2.2, 2.3.1, 5.1.3, 5.2.2, 6.1.3, 7.1.1)	JobTread	Decided for most sheets; master budget open
Personal cell	Calls and texts (1.1.1, Phases 5 and 6)	Quo	Decided. Number porting undecided
In-person conversation	Super notification and field release (1.1.2, 4.3.1)	Slack, channel per job	Proposed, after JobTread and Quo
Gmail and Google Drive	Drawings, bids, quotes, agreements (throughout)	Staying	No replacement
Adaptive	Fee invoicing, city fees (3.1.4, 4.1.1)	Staying	Untouched
ConX under Houzz	Takeoffs (2.2.1, 6.2.1)	No decision	Stays by default. One super prefers Bluebeam

Granola is available but no meeting here is recorded today. JobTread selections is the target for 6.1.1.

Quality checklist

- [x] No personal names in map fields; titles end in "Workflow" and "Process"; activities start with a verb
- [x] 7 phases, 16 processes, 2 to 6 activities each
- [x] Every process has an owner, trigger, and end state; decision points show branches
- [x] Unknowns are flagged, not filled in