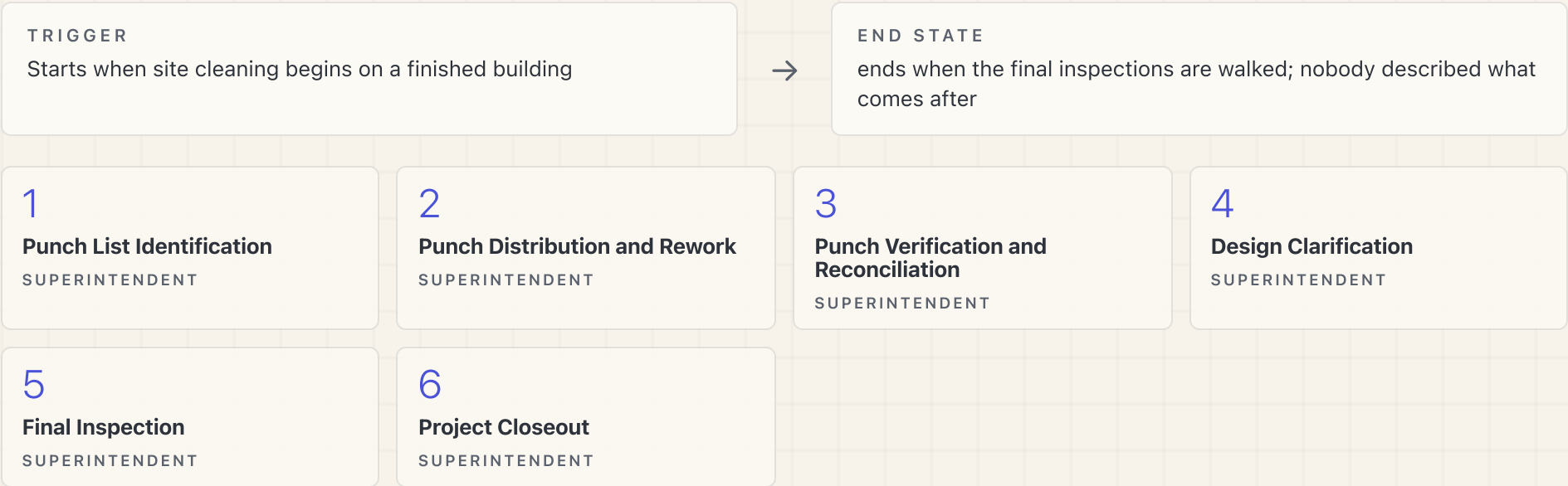


Punch List, RFI, and Closeout Workflow

Starts when site cleaning begins on a finished building. The superintendent walks the job, keeps one live punch register, sends each trade its items, gets the trade back, and checks completions daily. Design questions go to the architect as RFIs. Today it ends when the final inspections are walked; nobody described what comes after.



Punch List Identification

SUPERINTENDENT

PROCESS 1.1

Punch Phase Entry Process

ROLE

Superintendent

TRIGGER

Starts when cleaning starts on the finished units (CON-F32)

END STATE

UNKNOWN — *not in source*

○ 1.1.1 Open the punch register for the job

PUNCH MANAGEMENT

Trigger → Cleaning crew starts on the finished units End → Punch register open with trade, location, and task columns

| Confirm punch phase entry when site cleaning begins

○ 1.1.2 Set the punch grouping convention for the job

PUNCH MANAGEMENT

Trigger → Punch register open End → Grouping convention set for the job's punch walks

PROCESS 1.2

Punch Walk Process

ROLE

Superintendent

TRIGGER

UNKNOWN — *not in source*

END STATE

Ends when the items are ready for the register

● 1.2.1 Walk the site one to two times weekly for a joint punch review

PUNCH MANAGEMENT

Trigger → Weekly punch walk falls due during the punch phase End → Joint walk complete with items captured

● 1.2.2 Walk each unit and the exterior for punch items

PUNCH MANAGEMENT

Trigger → Punch phase open on the job End → Every unit and the exterior inspected with items captured

● 1.2.3 Capture punch items on a recorded job walk

PUNCH MANAGEMENT

Trigger → Punch walk begins End → Walk recorded with punch items in the capture output

PROCESS 1.3

Punch Register Entry Process

ROLE	TRIGGER	END STATE
Superintendent	Starts when a punch walk is done	Ends when the register is the single record of every open item

1.3.1

Transcribe captured punch items into the punch register

Trigger → Punch walk recording complete End → Items in the register with trade, location, and task set on one live document

| Append new punch items to the existing register

1.3.2

Generate the punch list from a named capture template

Trigger → Punch walk recording complete End → Punch list and follow-up message produced without a manual filtering pass

1.3.3

Submit the punch register for independent verification

Trigger → Punch register assembled for a unit or for the job End → Register reviewed by a second party with added items recorded

PROCESS 2.1

Trade Distribution Process

ROLE

Superintendent

TRIGGER

Starts when the register is updated after a walk

END STATE

Ends when every trade with open items has them

- 2.1.1 Send each trade its punch items as a photographed list

TRADE COORDINATION

Trigger → Register updated after a punch walk End → Each trade has received its own punch items by unit

- 2.1.2 Share a punch checklist with subs through a phone notes app

TRADE COORDINATION

Trigger → A sub will not work from email or text End → Sub has a shared checklist they can mark

- 2.1.3 Reconcile sub-marked checklist completions into the punch register

TRADE COORDINATION

GAP

Trigger → Sub marks items complete in the shared checklist End → Sub-marked completions reflected in the punch register

PROCESS 2.2

Rework Scheduling Process

ROLE

Superintendent

TRIGGER

Starts when punch items are assigned to a trade that has left the site

END STATE

Ends when the trade has a return date

- 2.2.2 Brief the returning crew on the punch rework scope

TRADE COORDINATION

GAP

Trigger → Replacement crew arrives for punch rework End → Returning crew understands the specific rework scope per unit

- 2.2.3 Hold an installation kickoff with the supplier at first delivery

TRADE COORDINATION

GAP

Trigger → First delivery of a detail-heavy finish material End → Installers walked through the manufacturer's installation process on site

PROCESS 3.1

Daily Punch Walk Process

ROLE	TRIGGER	END STATE
Superintendent	Starts with the daily site walk	Ends when every unit is walked and marked
3.1.1 Mark completed punch items on the printed list	Trigger → Daily site walk begins End → Printed list marked for each unit walked Carry the printed punch list on the daily unit walk	PUNCH MANAGEMENT
3.1.2 Notify the trade of punch work still outstanding	Trigger → Owed item found not done on the walk End → Trade told the item is still open	TRADE COORDINATION

PROCESS 3.2

Register Reconciliation Process

ROLE	TRIGGER	END STATE
Superintendent	Starts when the daily walk is done	Ends when the register matches the site
3.2.1 Reconcile the marked printed list into the punch register	Trigger → Daily punch walk complete End → Register matches the day's site state	PUNCH MANAGEMENT
3.2.2 Verify punch rework meets the required standard	Trigger → Trade reports punch rework complete End → UNKNOWN , sources do not describe how rework acceptance is judged	PUNCH MANAGEMENT

PROCESS 4.1

RFI Origination Process

ROLE	TRIGGER	END STATE
Superintendent	Starts when work reaches a detail the drawings do not answer	Ends when the RFI is logged
● 4.1.1 Identify a discrepancy between the drawings and site conditions Trigger → Work reaches a detail the drawings do not resolve End → Discrepancy identified as needing an architect answer		
● 4.1.2 Log the RFI with a marked plan screenshot and description Trigger → Discrepancy identified End → RFI recorded with plan location and description		
○ 4.1.3 Verify delivered material dimensions against the drawings GAP Trigger → Detail-critical material delivered to site End → Dimension mismatches raised before installation begins		
○ 4.1.4 Route subcontractor design questions into the RFI log GAP Trigger → Subcontractor raises a design question the drawings do not answer End → Sub question either answered from the documents or logged as an RFI		

PROCESS 4.2

RFI Resolution Process

ROLE	TRIGGER	END STATE
Superintendent	Starts when the RFI is logged	Ends when the answer and any price or schedule change are handled
4.2.1 Assign the RFI to the architect with a due date	DESIGN COORDINATION	
Trigger → RFI logged End → Architect holds the RFI with a due date		
4.2.2 Resolve the RFI through threaded discussion with the architect	DESIGN COORDINATION	
Trigger → Architect responds on the RFI End → Answer agreed in the task thread		
4.2.3 Apply the RFI answer to the affected work	DESIGN COORDINATION	
Trigger → RFI answered End → UNKNOWN , sources do not describe how RFI answers reach the trade or the drawing set		
4.2.4 Track open RFIs against their response due dates	DESIGN COORDINATION	
GAP Trigger → RFI assigned to the architect End → Every open RFI visible with its due date and overdue status		
4.2.5 Price the RFI answer as a change order when scope or time moves	DESIGN COORDINATION	
GAP Trigger → RFI answer changes scope, cost, or duration End → Cost or time consequence recorded as a priced change order or explicitly waived		

PROCESS 5.1

Inspection Readiness Process

ROLE	TRIGGER	END STATE
Superintendent	Starts when the building is nearing completion	Ends when every known city requirement is checked
5.1.1 Pre-run the city inspector's checklist on the building	REGULATORY COMPLIANCE	
Trigger → Building nearing completion of punch work End → Every known city requirement verified complete		
5.1.2 Correct items failing the readiness check	REGULATORY COMPLIANCE	
Trigger → Readiness check finds an item incomplete End → UNKNOWN , sources do not describe the correction path		

REGULATORY
COMPLIANCEREGULATORY
COMPLIANCE

PROCESS 5.2

Municipal Inspection Process

ROLE	TRIGGER	END STATE
Superintendent	Starts when the readiness check is done	Ends when the inspections are walked and the outcome is on record
● 5.2.1 Call in the final building and zoning inspections	Trigger → Readiness check complete End → Final inspections scheduled with the city	REGULATORY COMPLIANCE
● 5.2.2 Meet the city inspector on site for the final inspection	Trigger → Inspection date arrives End → Inspection walked with the inspector	REGULATORY COMPLIANCE
○ 5.2.3 Record the final inspection result and any correction list	Trigger → Final inspection walked End → Pass or fail result and any correction list recorded against the job	REGULATORY COMPLIANCE
○ 5.2.4 Resolve inspection corrections and call for re-inspection	Trigger → Final inspection returns corrections End → UNKNOWN , sources do not describe the re-inspection loop	REGULATORY COMPLIANCE

PROCESS 6.1

Substantial Completion Process

ROLE

Superintendent

TRIGGER

UNKNOWN — not in source

END STATE

UNKNOWN — not in source☐ 6.1.1 Declare substantial completion against a defined standard

PROJECT CLOSEOUT

GAP Trigger → **UNKNOWN**, no substantial-completion trigger exists today End → Substantial completion recorded against an agreed standard☐ 6.1.2 Walk the completed punch scope with the owner

PROJECT CLOSEOUT

GAP Trigger → Punch register reduced to zero open items End → Owner has walked the completed punch scope☐ 6.1.3 Record owner acceptance of the completed work

PROJECT CLOSEOUT

GAP Trigger → Owner walk complete End → Owner acceptance recorded in the project system of record

PROCESS 6.2

Job Closure Process

ROLE

Superintendent

TRIGGER

UNKNOWN — not in source

END STATE

UNKNOWN — not in source

- | | |
|---|------------------|
| ☐ 6.2.1 Close the punch register for the job | PROJECT CLOSEOUT |
| GAP Trigger → All punch items marked complete and accepted End → Punch register closed with zero open items | |
| ☐ 6.2.2 Assign supplier and subcontractor warranties to the owner | PROJECT CLOSEOUT |
| GAP Trigger → Substantial completion recorded End → Third-party warranties assigned to the owner with commencement dates recorded | |
| ☐ 6.2.3 Hand over closeout documentation to the owner | PROJECT CLOSEOUT |
| GAP Trigger → UNKNOWN , no closeout documentation trigger exists in the sources End → UNKNOWN , sources do not describe a closeout package or its contents | |
| ☐ 6.2.4 Close the job in the project system of record | PROJECT CLOSEOUT |
| GAP Trigger → Closeout documentation handed over End → Job archived and the workflow complete | |

Notes & Assumptions

NOTES & ASSUMPTIONS

Sources and confidence

- The whole map is DRAFT. Every field nobody described says `UNKNOWN`.
- Punch list: well described (TOM-F52 to F56, CON-F32 to F39). Phases 1 to 3 are mostly `active`.
- RFI: thin but real (CON-F40 to F43, CON-F23, TOM-F45). Who else can raise one, turnaround, and what happens to the answer are unknown.
- Closeout: nearly absent. Phase 6 is all `gap`.
- Finding IDs: `TOM-F##` is the 2026-08-05 interview, `CON-F##` the 2026-08-06 interview, `STACK-F##` the 2026-08-11 tech-stack session, `OFF-F##` the 2026-07-21 office session, `DISC-F##` the 2026-05-19 discovery call.
- No personal names appear in any field.
- Roles: **Superintendent**, **Principal** (Slate's internal principal; title inferred, see W3 Q4), **Architect**, **City of Oklahoma City**, **Owner** (the developer client).
- Counts: 6 phases, 13 processes, 39 core activities. **16 active, 6 draft, 17 gap**; 7 of the gaps are all of Phase 6.

Why condensation was modest

Reduction was 8.3 percent (3 merges); six of the thirteen processes are shared with other maps and were left as they are.

OPERATOR QUESTIONS

1. **Phase 1:** Should the punch walk be grouped trade-first instead of unit-first? One superintendent prefers trade-first.
2. **Phase 4:** Can we get who else can raise an RFI, the expected architect turnaround, and where the answer is recorded?
3. **Phase 6:** Is it right that Slate has no closeout gate today?
4. **Phase 6:** Should we book a separate closeout session with the principal?
5. **Phase 4:** Is about 43 RFIs the right ballpark for the last project? The count was given as 30, 43, and 40.
6. **Phase 2:** Should briefing the returning crew on rework scope be added as a step? Crews turn over between the original work and the fix.
7. **Phase 4:** Should checking delivered material sizes against the drawings be added, and does it belong here or in the Field Execution Workflow?
8. **Phase 3:** Once punch lists move to JobTread, does the print-and-re-enter loop go away completely?
9. **Phase 4:** Should this map show the JobTread target state with Asana noted, or the split where old jobs stay in Asana?
10. **Phase 1:** Is the punch register copied from a master template for each job?
11. **Phase 2:** Does JobTread's punch-list sharing reach subs directly? That would remove the iPhone Notes workaround.
12. **Phase 1:** Is it right to treat "confirm cleaning has started" as the trigger for opening the register, and not a task of its own?
13. **Phase 1:** Should "Open the punch register" be active instead of draft? Nobody described who opens it or how.
14. **Phase 1:** Are new punch items added to the one register today, or does a second list get started?
15. **Phase 1:** Is Punch Register Entry Process the right home for the Granola punch template step (1.3.2)?

Notes & Assumptions (continued)

NOTES & ASSUMPTIONS

Structure notes

- Phase 6 stays as a phase even though nothing in it is done today. That absence is the biggest finding here.
- Closeout needs its own follow-up session, likely with the principal.
- Phase 4 runs alongside the build. RFIs come up during active build, not after punch. So do 2.2.3 and 4.1.3.
- RFIs, punch walks, inspections, and list updates connect to work in the other maps.
- Trade Scheduling Process lives in the Field Execution Workflow (2.4). Process 2.2 names it and holds the local checklist.
- Change orders are named but never described (TOM-F45, CON-F44). Only the RFI leg is mapped, at 4.2.5; ownership is asked at W3 Q10.
- Every handoff goes outside Slate: trades, architect, city, Owner. The whole workflow sits with one person.
- The two supers do some things differently (1.2.3, 2.1.2, 3.1.1, 3.2.1). Whether to split the map is asked at W2 Q16.

OPERATOR QUESTIONS

16. **Phase 6:** Which owner contract does Slate use? We need that before using AIA closeout steps.
17. **Phase 1:** Should a second-party punch review be added as a step? Today the only second look is the principal's weekly walk.
18. **Phase 6:** Should substantial completion be declared with a dated punch list still open, instead of after the register hits zero?
19. **Phase 6:** Does Slate assign supplier and sub warranties to the owner at any point today?
20. **Phase 4:** Does JobTread provide an RFI log with an overdue view, or does that need building?
21. **Phase 4:** Should the RFI-to-change-order path be a required step? The window fix was absorbed with no record.
22. **Phase 5:** What does Slate actually receive from the city when a final inspection passes?
23. **Phase 2:** Does the superintendent read sub ticks from the shared notes checklist back into the register today?
24. **Phase 2:** Are punch items ever read out to a sub over the phone instead of sent?
25. **Phase 4:** Should RFI work stay as a phase inside this workflow, or become its own workflow?
26. **Phase 5:** Is there a real trigger for calling the final inspection, like a punch-item threshold or the last trade leaving?
27. **Phase 4:** Do sub design questions ever become logged RFIs today? Subs ask by phone and text, where nothing is recorded.
28. **Phase 6:** Who owns the substantial-completion and owner-acceptance gate, the superintendent or the principal?

Notes & Assumptions (continued)

NOTES & ASSUMPTIONS

Tool transitions

AREA	TOOL TODAY	TARGET	STATUS
Punch register	Google Sheets, printed by unit or by trade	JobTread punch lists	Decided 2026-08-25. Removes the print, pen-mark, and re-type loop
Punch walk capture	Granola recorded walk	Granola	Staying. A punch template exists but is unused (1.3.2)
Punch distribution to trades	Photo of the list by iMessage from a personal cell	Quo for the send; JobTread for the list	Decided 2026-08-25. Quo keeps every call and text
Sub checklists for subs who avoid email and text	iPhone Notes shared checklists	None decided	Open. Sub ticks have no path into the register (2.1.3)
Rework scheduling calls	Personal cell, 20 to 25 calls a day	Quo	Decided 2026-08-25. See Field Execution Workflow 2.4.1
RFI log	Asana task with plan screenshot and comment thread	JobTread	Decided 2026-08-25. Jobs underway stay in Asana through punch (STACK-F31)
RFI open-and-overdue view	None	JobTread, if it has an RFI register	Open. Unverified (4.2.4)
Internal and client communication	In person, call, text	Slack, channel per job plus a client channel	Proposed, timing open. Slack comes last (STACK-F21); JobTread is not the client portal (STACK-F23)

QuickBooks is left off pending W1 Q12.

Naming rewrites applied

ORIGINAL	APPLIED	RULE	REASON
Walk the site with the principal one to two times weekly	Walk the site one to two times weekly for a joint punch review	No roles in activity titles	The principal detail stays in the description (TOM-F54)
Confirm punch phase entry when site cleaning begins; Append new punch items to the existing register; Carry the printed punch list on the daily unit walk	Merged into 1.1.1, 1.3.1, and 3.1.1	Merge	See condensation log

Notes & Assumptions (continued)

NOTES & ASSUMPTIONS

Inferred verbs

ACTIVITY	VERB CHOSEN	ALTERNATIVE THAT WOULD MEAN SOMETHING DIFFERENT
1.3.1 Transcribe captured punch items into the punch register	Transcribe	"Merge" if items come from two sources
3.2.2 Verify punch rework meets the required standard	Verify	"Inspect" or "Accept"; the source does not say which
5.1.1 Pre-run the city inspector's checklist on the building	Pre-run	"Audit"
6.1.1 Declare substantial completion against a defined standard	Start closeout only after the work meets an agreed standard.	

Notes & Assumptions (continued)

NOTES & ASSUMPTIONS

Assumptions to verify

- **Sub-functions are tentative.** Punch Management (11), Trade Coordination (6), Design Coordination (9), Regulatory Compliance (6), Project Closeout (7).
- **Nobody described how any handoff is confirmed:** trades, architect, city, or Owner. One interview item.
- **Unhappy paths are mostly absent.** Described: crew turnover (CON-F37), the cabinet failure (CON-F38), the window case (CON-F43). Not described: a failed inspection, a rejected punch item, an owner dispute, an unanswered RFI.
- **The single live register depends on manual re-entry.** If JobTread removes the print-and-pen loop, 3.1.1 and 3.2.1 change or disappear.
- **Punch identification is a single point of failure.** All on the superintendent, no client sign-off (TOM-F53, CON-F36). One superintendent on two jobs (TOM-F2, DISC-F2) doubles that.
- **Two answers stand on three items:** phase trigger (W3 Q1), grouping (question 1), RFI count (question 5).
- **Adding to one register may be a wish, not practice** (TOM-F56). Asked at question 14.
- **Every AIA-based activity hinges on question 16.** 1.3.3, 4.1.4, 4.2.4, 4.2.5, and 6.2.2 only apply if Slate's contracts are near the AIA family.

Quality checklist

- [x] No personal names; workflow title ends in "Workflow"; all 13 process titles end in "Process"
- [x] All 39 activities start with an action verb, under 15 words, no em dashes
- [x] Shared processes are named, not redefined (2.2, 2.2.3)
- [x] Every process has role, trigger, and end state; 2 to 6 activities each
- [x] Gaps and unknowns are flagged, never filled in
- [x] 28 operator questions, tagged P1 to P6, one question mark each