

Slate Mapping Session Questions

96 open questions across 4 workflow maps. Each question is anchored to the workflow and phase it belongs to; answer them in order while walking the maps, and the answers become the next revision of each map.

Office Bidding and Pre-Construction Workflow

24 questions

Superintendent Pre-Construction Workflow

18 questions

Field Execution Workflow

26 questions

Punch List, RFI, and Closeout Workflow

28 questions

Office Bidding and Pre-Construction Workflow

Q1

PHASE 7

Is the signed construction agreement the single end of this workflow?

Q2

[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?

Q3

[P2, P5] Who owns the budget, scopes, bid requests, and the schedule, and when does a super step in?

Q4

PHASE 2

Should the cost refresh run at project close on every line that missed the estimate by more than a set percentage?

Q5

PHASE 3

On repeat-developer jobs, is the owner's verbal yes at the budget meeting the go-ahead to spend sub time?

Q6

PHASE 3

Is there a set path when the presented number is far above the owner's ceiling?

Q7

PHASE 4

Should the office own permit tracking as a status field on the job?

Q8

PHASE 4

Is it true that the office chases the refined drawing set and the wait has no limit today?

Q9

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?

Q10

PHASE 5

Is price variance the whole rule for which trades get a formal scope?

Q11

PHASE 6

Is the split that the office manager takes repeatable takeoffs and the principal keeps the judgment-heavy ones?

Q12

[P2, P3] Should QuickBooks be added as the accounting system behind Adaptive?

Q13

PHASE 1

Should writing down the opportunity screen stay out of scope for now?

Q14

PHASE 2

Is the spec one-pager a template today?

Office Bidding and Pre-Construction Workflow (continued)

Q15

PHASE 1

Should the super-capacity check be its own activity instead of a line inside the screen?

Q16

PHASE 1

Should design-phase pricing be mapped as its own process at the front of Phase 1?

Q17

PHASE 7

Does a final budget review with the owner happen before the contract amounts are filled in?

Q18

[P6, P7] Does whoever runs a takeoff also price it and enter it into the final budget?

Q19

PHASE 1

Is a declined opportunity recorded anywhere today?

Q20

[P2, P3] Should allowances become a signed exhibit with amounts by category and a selection deadline?

Q21

PHASE 2

Should the budget carry a visible contingency line?

Q22

PHASE 2

Should a second person, likely the office manager, review the budget before it is presented?

BENALI

Q23

PHASE 5

Do returned bids get checked against each other for scope gaps today?

Q24

PHASE 5

Is sub insurance and license re-verified on each job today?

Superintendent Pre-Construction Workflow

Q1

PHASE 4

Should the JobTread schedule build start from one standard template?

Connor uses Slate's template, Tom clones a past job.

Q2

PHASE 4

Should we plan the JobTread schedule build around two to three hours?

Connor says two to three hours, Tom about a day, you three to four.

Q3

PHASE 4

Should a two-way sign-off on the baseline schedule be required before construction starts?

Tom wants it, with exclusions named.

Q4

PHASE 4

Should the schedule bonus terms live in the same document as the baseline sign-off?

No terms are written today.

Q5

PHASE 4

Does the superintendent build the owner-facing milestone schedule on every job?

Two sources confirm it exists (OFF-F56, DISC-F28), none says who builds it.

Q6

PHASE 1

Is setting up each job's projects superintendent work today?

You said you create each project from the template yourself.

Q7

PHASE 5

Should we ask Tom to find his lead-time reference before the review session?

He built one and cannot say where it is.

Q8

PHASE 2

Is the takeoff software ConX under Houzz?

Tom's transcript garbles the name.

Q9

PHASE 3

Should the two value engineering activities (3.2.1 owner side, 3.2.2 Slate side) stay split?

Q10

PHASE 2

Should the superintendent hand you a completed takeoff-and-bid package as a required step?

No step delivers it today (2.2.4).

Q11

PHASE 4

Should the baseline schedule carry a written basis naming duration sources, buffer, and exclusions?

A bonus needs that record to measure against.

Superintendent Pre-Construction Workflow (continued)

Q12

PHASE 3

After each plan revision, who reprices the budget, the superintendent or you?

No step does it today.

Q13

PHASE 5

Do you order long-lead items at contract signing, with install, needed-on-site, and order dates in the job template?

Only Tom described this (TOM-F31).

Q14

PHASE 4

Should the schedule review between superintendent and principal count as a handoff between two functions?

That raises its risk rating.

Q15

PHASE 4

Should there be a set point where the owner-facing schedule gets re-issued?

Today it is never updated.

Q16

PHASE 4

Should Tom's and Connor's names stay in the map?

The alternative is Superintendent A and B with a key held separately.

Q17

PHASE 3

When the owners do not accept the budget, is the cost cutting entirely office work, with no superintendent value engineering pass first?

Q18

PHASE 5

Should baseline sign-off, long-lead order status, and surveyor booking be the three items that close the handoff into field execution?

Nothing checks it today.

Field Execution Workflow

Q1

PHASE 6

Should cleaning start be the confirmed punch boundary?

Connor first said cleaning start, then agreed to cleaning finish.

Q2

PHASE 3

Do you want to set the daily-log standard yourself?

Today there is no standard.

Q3

PHASE 2

Should we add a step that tells the owner a revised completion date?

The client schedule is never updated.

Q4

PHASE 2

Is Principal the label you want for yourself in the ops map?

Q5

PHASE 2

Should one to-do method become the Slate standard going into JobTread?

Tom uses paper, Connor uses Asana.

Q6

PHASE 3

Does Connor's job have in-house laborers with daily lists?

Tom keeps one per laborer.

Q7

PHASE 2

Should we design the per-sub pre-arrival checklist as part of this engagement?

Q8

PHASE 3

Is Connor's construction checklist a real standing list, separate from the punch list?

Q9

PHASE 6

Should the supplier install kickoff become standard for every supplied finish system, not just cabinets?

Q10

PHASE 2

Should change orders get their own workflow map?

No source describes how one starts, gets priced, or gets approved.

Q11

PHASE 2

Should look-ahead prep move to Friday?

You said you would prefer a Friday sweep.

Q12

PHASE 3

Do the superintendents review job budgets during the build today?

You said you do nearly all of the budget.

Field Execution Workflow (continued)

- Q13

PHASE 2

Do you want an interim client-communication decision before JobTread go-live?

Until Slack, clients stay on iMessage.
- Q14

PHASE 2

Does the two-project split (client-facing and internal) need to carry into JobTread?
- Q15

PHASE 2

Should the Granola-to-task sync be treated as live, or held as draft until JobTread is set up?
- Q16

PHASE 3

Do the eight titles in the naming table describe the work the way you would say it?
- Q17

PHASE 2

Should we do a dedicated pass on failure paths before the gap analysis?

Nothing describes a sub going bust, weather, or a late delivery.
- Q18

PHASE 2

For the Monday review, is "the week's plan is agreed and carryover items are named" the right done check?
- Q19

PHASE 6

Does the superintendent build an outstanding-items list before cleaning starts?

BENALI

- Q20

PHASE 2

For takeoffs sent to the Office Manager, is "the quantity is back on the task and the order can be placed" the right done check?
- Q21

PHASE 6

Is it true that nothing happens on cabinet delivery day today beyond install starting?
- Q22

PHASE 2

Does your Monday look-ahead name what is blocking each task and who clears it?

That is typical in custom residential work.
- Q23

PHASE 3

Should the daily log always show weather, each trade and headcount, work done, deliveries, and delays?
- Q24

PHASE 4

Should below-slab work get a photo record before the pour, like the pre-insulation video?
- Q25

PHASE 3

Do the seven folds listed at the top of this map match how the supers would describe the work?
- Q26

PHASE 5

Where should the pre-insulation video be filed?

Today it may exist only on a phone.

Punch List, RFI, and Closeout Workflow

Q1

PHASE 1

Should the punch walk be grouped trade-first instead of unit-first?

One superintendent prefers trade-first.

Q2

PHASE 4

Can we get who else can raise an RFI, the expected architect turnaround, and where the answer is recorded?

Q3

PHASE 6

Is it right that Slate has no closeout gate today?

Q4

PHASE 6

Should we book a separate closeout session with the principal?

Q5

PHASE 4

Is about 43 RFIs the right ballpark for the last project?

The count was given as 30, 43, and 40.

Q6

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.

Q7

PHASE 4

Should checking delivered material sizes against the drawings be added, and does it belong here or in the Field Execution Workflow?

Q8

PHASE 3

Once punch lists move to JobTread, does the print-and-re-enter loop go away completely?

Q9

PHASE 4

Should this map show the JobTread target state with Asana noted, or the split where old jobs stay in Asana?

Q10

PHASE 1

Is the punch register copied from a master template for each job?

Q11

PHASE 2

Does JobTread's punch-list sharing reach subs directly?

That would remove the iPhone Notes workaround.

Q12

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?

Punch List, RFI, and Closeout Workflow (continued)

Q13

PHASE 1

Should "Open the punch register" be active instead of draft?

Nobody described who opens it or how.

Q14

PHASE 1

Are new punch items added to the one register today, or does a second list get started?

Q15

PHASE 1

Is Punch Register Entry Process the right home for the Granola punch template step (1.3.2)?

Q16

PHASE 6

Which owner contract does Slate use?

We need that before using AIA closeout steps.

Q17

PHASE 1

Should a second-party punch review be added as a step?

Today the only second look is the principal's weekly walk.

Q18

PHASE 6

Should substantial completion be declared with a dated punch list still open, instead of after the register hits zero?

Q19

PHASE 6

Does Slate assign supplier and sub warranties to the owner at any point today?

Q20

PHASE 4

Does JobTread provide an RFI log with an overdue view, or does that need building?

Q21

PHASE 4

Should the RFI-to-change-order path be a required step?

The window fix was absorbed with no record.

Q22

PHASE 5

What does Slate actually receive from the city when a final inspection passes?

Q23

PHASE 2

Does the superintendent read sub ticks from the shared notes checklist back into the register today?

Q24

PHASE 2

Are punch items ever read out to a sub over the phone instead of sent?

Q25

PHASE 4

Should RFI work stay as a phase inside this workflow, or become its own workflow?

Punch List, RFI, and Closeout Workflow (continued)

Q26

PHASE 5

Is there a real trigger for calling the final inspection, like a punch-item threshold or the last trade leaving?

Q27

PHASE 4

Do sub design questions ever become logged RFIs today?

Subs ask by phone and text, where nothing is recorded.

Q28

PHASE 6

Who owns the substantial-completion and owner-acceptance gate, the superintendent or the principal?
