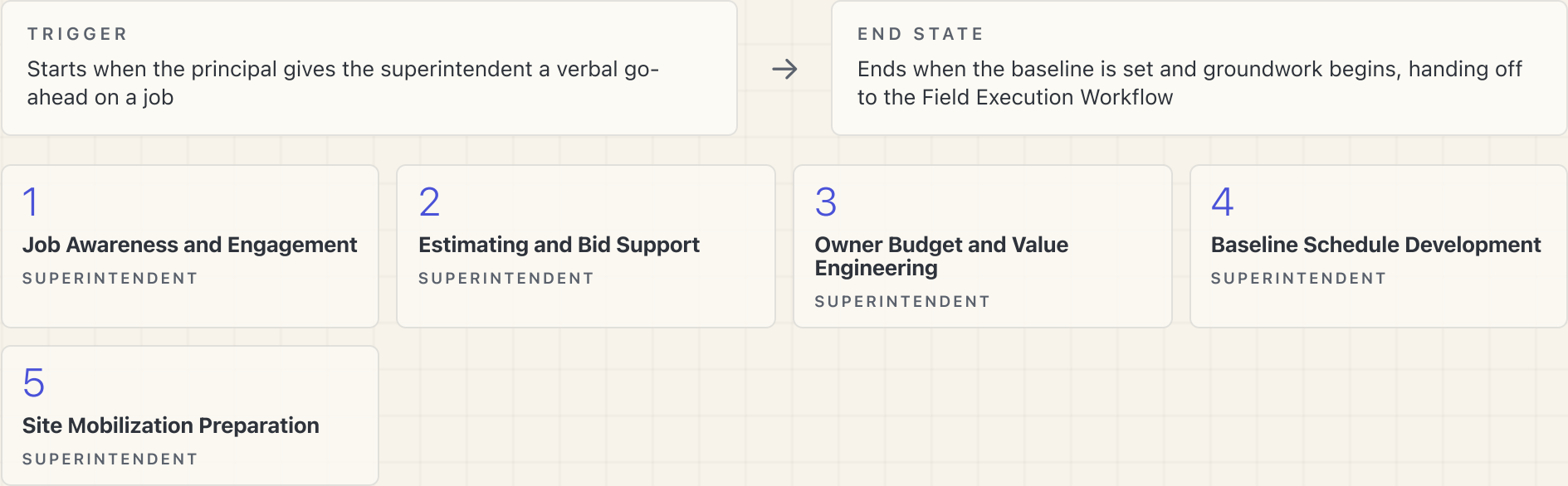


Superintendent Pre-Construction Workflow

Starts when the principal gives the superintendent a verbal go-ahead on a job. The superintendent reads the drawings, helps with takeoffs and bids, joins owner budget talks, builds the baseline schedule, and gets the site ready. Ends when the baseline is set and groundwork begins, handing off to the Field Execution Workflow. Missing today: a sign-off on the baseline, written bonus terms, and a record of what the schedule was built from.



Job Awareness and Engagement

SUPERINTENDENT

PROCESS 1.1

Job Awareness Process

ROLE

Superintendent

TRIGGER

Starts when the principal mentions an upcoming job, usually in person in the open office

END STATE

Ends when the superintendent knows the scope well enough to begin

● 1.1.1 Review the drawing set for scope familiarization

JOB INTAKE

Trigger → Verbal rundown received and drawing set available from the principal End → Superintendent can describe project scope and major sequences

Receive the verbal rundown of upcoming jobs. The principal gives a rough breakdown of the jobs lined up. There is no notification step and no artifact: the office has no interior walls, so awareness travels by proximity. Tool: in person in the office, with call and text as fallback (Slack channel-per-job proposed, timing unresolved; Quo takes external calls and texts, decided 2026-08-25 per operator confirmation).

○ 1.1.2 Confirm the pre-construction start date and assigned scope

JOB INTAKE

GAP Trigger → Verbal rundown received End → Start date and assigned pre-construction scope agreed in writing

PROCESS 1.2

Scope Gap Review Process

ROLE

Superintendent

TRIGGER

Starts when the drawing review is done

END STATE

Ends when gaps have been raised to the principal

○ 1.2.1 Sense-check the scope of work against the drawings to identify gaps

JOB INTAKE

Trigger → Drawing review complete End → Scope gaps and drawing questions raised to the principal

PROCESS 2.1

Quantity Takeoff Process

ROLE

Superintendent

TRIGGER

Starts with the drawing set

END STATE

Ends when quantities and pricing are recorded

- 2.1.1 Perform quantity takeoffs from the drawing set QUANTITY ESTIMATING
Trigger → Drawing set reviewed End → Quantities recorded for the assigned scope
- 2.1.2 Assemble pricing from the takeoff quantities QUANTITY ESTIMATING
Trigger → Takeoff quantities recorded End → Priced quantities available to the budget

PROCESS 2.2

Trade Scope and Bid Support Process

ROLE

Superintendent

TRIGGER

Starts when takeoffs are done

END STATE

Ends when bids are in hand and reach the principal

- 2.2.1 Draft scopes of work for the solicited trades BID COORDINATION
Trigger → Takeoffs complete for the trade's scope End → Scope of work drafted and ready to send
- 2.2.2 Solicit and collect trade bids for the assigned scopes BID COORDINATION
Trigger → Scope of work drafted End → Trade bids and stated phase durations received
- 2.2.3 Walk the site with the earthwork and foundation contractor BID COORDINATION
Trigger → Earthwork and foundation bid outstanding End → Contractor has seen site conditions and their bid accounts for them
- 2.2.4 Submit the takeoff and bid package to the principal for the budget BID COORDINATION
Trigger → Trade bids received for the assigned scopes End → Principal confirms the takeoff and bid package is complete for the budget

PROCESS 3.1

Owner Budget Presentation Process

ROLE	TRIGGER	END STATE
Superintendent	Starts with an assembled budget	Ends when the owners accept a budget
3.1.1 Present the project budget to the owners	OWNER ENGAGEMENT	
Trigger → Budget assembled and ready to present End → Owners have the number and their reaction is known		
3.1.2 Attend owner meetings through the plan revision cycle	OWNER ENGAGEMENT	
Trigger → Plan revision issued or owner meeting scheduled End → Revisions understood and reflected in the numbers		
3.1.3 Reprice the budget against each issued plan revision	OWNER ENGAGEMENT	
Trigger → Plan revision issued by the architect End → Budget reflects the revised drawings with changed line items identified		

PROCESS 3.2

Value Engineering Process

ROLE	TRIGGER	END STATE
Superintendent	Starts with budget pressure or an owner asking for options	Ends when the owner picks
3.2.1 Propose value engineering options against the owner's priorities	VALUE ENGINEERING	
Trigger → Budget exceeds the owner's target or the owner asks for options End → Options presented with cost impact		
3.2.2 Identify budget additions with upside under the cost-plus contract	VALUE ENGINEERING	
Trigger → Value engineering pass underway End → Additions identified with cost-plus upside quantified		

PROCESS 4.1

Baseline Schedule Build Process

ROLE

Superintendent

TRIGGER

Starts with the principal's verbal go-ahead

END STATE

UNKNOWN — *not in source*

- 4.1.1 Build out the job task list from an existing schedule and the plans

SCHEDULE PLANNING

Trigger → Principal's verbal go-ahead to build the schedule End → Job schedule holds the full task list including job-specific tasks

Add job-specific tasks read from the plans. Read the plans and add the tasks the template or prior schedule does not carry. Connor: "go through the plans a little bit and kind of add more job specific tasks to it." Tom checks the plans, budget, and scopes. He adds tasks now so he does not miss them later. Building count drives sequence duplication. Connor's upcoming job has three separate buildings and therefore three separate framing sequences.

- 4.1.2 Assign a duration to each schedule task from past experience

SCHEDULE PLANNING

Trigger → Starting task list in place End → Every schedule task carries a duration

- 4.1.3 Layer milestones and task dependencies onto the schedule

SCHEDULE PLANNING

Trigger → Durations assigned across the task list End → Milestones and dependencies in place across the schedule

- 4.1.4 Record the schedule basis and duration assumptions with the baseline

SCHEDULE PLANNING

GAP Trigger → Milestones and dependencies in place across the schedule End → Baseline carries a written basis naming duration sources, buffer, exclusions, and known risks

PROCESS 4.2

Schedule Review Process

ROLE	TRIGGER	END STATE
Superintendent	Starts with a drafted schedule	Ends when the schedule reflects those comments; there is no formal sign-off
4.2.1 Review the drafted schedule with the principal	SCHEDULE PLANNING	
Trigger → Baseline schedule drafted and principal available End → Principal's comments on sequence, pace, and omissions captured		
4.2.2 Revise the schedule from the review comments	SCHEDULE PLANNING	
Trigger → Review comments captured End → Schedule updated to reflect the review		
4.2.3 Run a second solo pass over the schedule against the plans	SCHEDULE PLANNING	
Trigger → Schedule revised and plans reviewed in depth End → No further missed job-dependent items found		
4.2.4 Record two-way sign-off on the baseline schedule	SCHEDULE PLANNING	
Trigger → Schedule revised and both parties agree it is realistic End → Baseline schedule signed by superintendent and principal, with exclusions named		

PROCESS 4.3

Owner-Facing Schedule Process

ROLE	TRIGGER	END STATE
Superintendent	Starts when the baseline schedule is set	UNKNOWN — not in source

4.3.1 Build the owner-facing milestone schedule in the client-facing project

Trigger → Baseline schedule set End → Owner has a padded milestone-level schedule

SCHEDULE PLANNING

PROCESS 5.1

Utility and Survey Coordination Process

ROLE

Superintendent

TRIGGER

UNKNOWN — *not in source*

END STATE

Ends when both are done; the staking itself is in the Field Execution map, 4

- 5.1.1 Meet the utility provider on site to resolve power sourcing

SITE MOBILIZATION

Trigger → Job approaching mobilization End → Power source and any temporary facilities determined

- 5.1.2 Book the land surveyor against the layout need date

SITE MOBILIZATION

Trigger → Groundwork approaching on the baseline schedule End → Surveyor booked against the layout need date

- 5.1.3 Check off the recurring pre-construction obligations on the project template

SITE MOBILIZATION

GAP Trigger → Job created from the project template End → Every recurring pre-construction obligation checked off as completed

PROCESS 5.2

Long-Lead Procurement Process

ROLE

Superintendent

TRIGGER

UNKNOWN — *not in source*

END STATE

Ends when long-lead items are on order with delivery windows set against the baseline

○ 5.2.1 Order long-lead materials at contract signing

SITE MOBILIZATION

Trigger → Construction contract signed End → Long-lead items on order with delivery dates against the schedule

Apply the lead-time reference for contractor and material timing. Check how far ahead each contractor must be contacted and each material ordered before it is needed on the schedule. Tom built exactly this reference: "I did make at some point a schedule of how far we need to be contacting people from my own reference. So that's out there somewhere. Which is for contractors and materials. And I think it was something to do with inspections, too." The reference exists but is unlocated, is personal rather than shared, and is not a defined step for either superintendent. Whether it covers inspections is unconfirmed. See Operator question 7.

○ 5.2.2 Log long-lead items with required-on-job and order dates

SITE MOBILIZATION

GAP Trigger → Long-lead item identified against the baseline schedule End → Every long-lead item carries an install date, a required-on-job date, and an order date

○ 5.2.3 Hold an installation kickoff with the supplier at first delivery

SITE MOBILIZATION

GAP Trigger → Long-lead assembly ordered with a first delivery date on the schedule End → **UNKNOWN**, with format, attendees, and trigger threshold defined at the canonical activity

○ 5.2.4 Schedule long-lead deliveries against the build sequence

SITE MOBILIZATION

Trigger → Long-lead orders placed End → Delivery windows set against the baseline schedule

Notes & Assumptions

NOTES & ASSUMPTIONS

Sources and confidence

- Primary: the Tom Kirk interview 2026-08-05 (TOM-F4 to F50) and the Connor Fields interview 2026-08-06 (CON-F3 to F47).
- Office boundary: the 2026-07-21 office/bidding session (OFF-F38 to F74). Framing: the 2026-05-19 discovery conversation (DISC-F1 to F28).
- Tool state: the 2026-08-11 tech-stack session (STACK-F2 to F31). The JobTread and Quo decision comes from operator confirmation 2026-08-25.
- Every `gap` activity traces to a source naming the absence or to a claim in this map that no activity backs up.
- Confidence is high on the schedule phases (both superintendents walked them) and lower on Phases 2 and 3, where only Tom describes doing the work and the principal disagrees.
- Status notes: 2.1.2, 2.2.1, 2.2.2 are `draft` because ownership is contested; 2.2.3 because the principal said "might" (OFF-F52); 5.2.1 because only Tom described it (TOM-F31); 4.3.1 is `active` on two sources (OFF-F56, DISC-F28).

OPERATOR QUESTIONS

1. **Phase 4:** Should the JobTread schedule build start from one standard template? Connor uses Slate's template, Tom clones a past job.
2. **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.
3. **Phase 4:** Should a two-way sign-off on the baseline schedule be required before construction starts? Tom wants it, with exclusions named.
4. **Phase 4:** Should the schedule bonus terms live in the same document as the baseline sign-off? No terms are written today.
5. **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.
6. **Phase 1:** Is setting up each job's projects superintendent work today? You said you create each project from the template yourself.
7. **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.
8. **Phase 2:** Is the takeoff software ConX under Houzz? Tom's transcript garbles the name.
9. **Phase 3:** Should the two value engineering activities (3.2.1 owner side, 3.2.2 Slate side) stay split?
10. **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).
11. **Phase 4:** Should the baseline schedule carry a written basis naming duration sources, buffer, and exclusions? A bonus needs that record to measure against.
12. **Phase 3:** After each plan revision, who reprices the budget, the superintendent or you? No step does it today.
13. **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).
14. **Phase 4:** Should the schedule review between superintendent and principal count as a handoff between two functions? That raises its risk rating.

Notes & Assumptions (continued)

NOTES & ASSUMPTIONS

Structure notes

- Five phases, all owned by the superintendent. The only handoffs between functions are at the two ends: office to field at Phase 1, pre-construction to field execution after Phase 5.
- Phases 2, 3, and 5 often happen at the same time.
- Processes 1.2 and 4.3 have one activity each and stay separate: 1.2 is planned practice, not current practice; 4.3 waits on question 5.
- This map owns Long-Lead Procurement (5.2), Owner-Facing Schedule (4.3), and Schedule Review (4.2); the Field Execution map points to them. Processes 2.1, 2.2, and 3.2 may move to the office bidding map once ownership is settled.
- Counts: 5 phases, 11 processes, 30 core activities, 1 to 4 activities per process.
- Status counts: 15 `active`, 7 `draft` (1.2.1, 2.1.2, 2.2.1, 2.2.2, 2.2.3, 5.2.1, 5.2.4), 8 `gap` (1.1.2, 2.2.4, 3.1.3, 4.1.4, 4.2.4, 5.1.3, 5.2.2, 5.2.3). Do not paste `draft` or `gap` items as `active`.

Rule deviations

[Rule deviation] Tom, Connor, and "the principal" are named in descriptions, notes, and questions. Their eight differences cannot be kept without names. Titles, Roles, and Sub-functions carry no names. See question 16.

[Rule deviation] Middle phases have no handoff-in text because the same role owns every phase.

OPERATOR QUESTIONS

15. **Phase 4:** Should there be a set point where the owner-facing schedule gets re-issued? Today it is never updated.
16. **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.
17. **Phase 3:** When the owners do not accept the budget, is the cost cutting entirely office work, with no superintendent value engineering pass first?
18. **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.

Notes & Assumptions (continued)

NOTES & ASSUMPTIONS

Tool transitions

Decided changes come from operator confirmation 2026-08-25. QuickBooks is not in any superintendent source and is left off (office bidding map, question 12).

TODAY	WHERE IT APPEARS IN THIS MAP	TARGET	STATUS
Instagantt on Asana	4.1.1, 4.1.2, 4.1.3, 4.2.2, 5.2.4	JobTread native Gantt	Decided
Asana internal and client-facing projects	4.3.1	JobTread	Decided. Finishing jobs stay in Asana; new jobs start in JobTread
ConX under Houzz (takeoff)	2.1.1	None decided; JobTread takeoff named but unverified (TOM-F47)	Undecided. Tom prefers Bluebeam. See question 8
Excel and Google Sheets (master budget, bid sheet tab)	2.1.2, 2.2.1	JobTread	Decided in principle; which sheets is not listed
Personal cell calls and texts to subs, suppliers, surveyor, utility	2.2.2, 2.2.3, 5.1.1, 5.1.2, 5.2.1	Quo	Decided. Open: port numbers or start fresh
In-person office talk, email for drawings, owner updates	1.1.1, 4.3.1	Slack	Proposed, timing unresolved
Granola; Google Workspace (Gmail, Drive); Adaptive	3.1.1, 3.1.2; 1.1.1, 2.2.1, 2.2.2, 5.2.1; office map only	Staying	Staying
No tool today	4.1.4, 5.1.3, 5.2.2, 5.2.3	JobTread project template and material ordering	Gap. Activities do not exist yet

Notes & Assumptions (continued)

NOTES & ASSUMPTIONS

Tom versus Connor divergences (logged, not blended)

1. **Entry trigger.** Tom: the first set of plans. Connor: permits reaching the city plus the principal's verbal go-ahead. Asked at the office bidding map, question 10.
2. **How much pre-construction.** Tom did takeoffs, bids, scopes, pricing, the budget pitch, and owner meetings. Connor is kept out of owner and bid meetings and prefers it. Asked at the office bidding map, questions 3 and 4.
3. **Schedule starting point.** Connor opens Slate's template in Instagantt. Tom clones a past project's schedule. Question 1.
4. **Schedule build time.** Connor: two to three hours. Tom: about a day. The principal: three to four hours at most. Question 2.
5. **Post-review pass.** Connor runs a second solo pass (4.2.3). Tom does that check during the build (4.1.1).
6. **Owner-facing schedule.** Tom describes a three-schedule model as what should happen. The principal confirms a padded five-to-ten milestone schedule; Connor never mentions one. Questions 5 and 15.
7. **Schedule detail.** Tom over-details on purpose so line items act as reminders. Connor pads whole-project durations by building size.
8. **Tool habits.** Tom avoids Asana in pre-construction and works by email. Connor keeps his to-do list on the Asana project. This matters for JobTread adoption.

Notes & Assumptions (continued)

NOTES & ASSUMPTIONS

Contradictions carried forward

- **Superintendent owns the budget versus the principal does 95 to 100 percent of it.** Read as the principal saying "budget" for "schedule". Office bidding map, questions 3 and 4.
- **Pre-construction end state.** Contract signed, permits in hand, or dirt moving; the principal says all three. This map ends at baseline set and groundwork starting. Office bidding map, question 1.
- **Schedule sign-off versus schedule bonus.** No sign-off exists while the principal wants a bonus tied to the schedule. See 4.2.4 and 4.1.4; questions 3, 4, and 11.
- **Connor's runway.** He says he has enough time between jobs, and also that he opened the current job weeks late. Both stand.
- **Project setup ownership.** Benali calls it a superintendent time sink; the principal says he creates each job's project himself. No activity added here. Question 6.
- **Owner-facing schedule is padded and never updated.** Nothing tells the owner the real completion date. Field Execution map, 2.3.4. Question 15.

Notes & Assumptions (continued)

NOTES & ASSUMPTIONS
Sub-function assignments (all tentative)

SUB-FUNCTION	ACTIVITIES
Job Intake	3
Quantity Estimating	2
Bid Coordination	4
Owner Engagement	3
Value Engineering	2
Schedule Planning	9
Site Mobilization	7

Schedule Planning at 9 may split into schedule build versus schedule review later.

Condense change table

BEFORE	AFTER	DECISIVE FAILED TEST	REASON
`Receive the verbal rundown of upcoming jobs` (was 1.1.1, active)	SOP checklist item under 1.1.1 (active)	SOP and assignment	It is the trigger restated; nobody can put "receive a rundown" on a task list.
`Add job-specific tasks read from the plans` (was 4.1.3, active)	Merged into 4.1.1 (active)	Same deliverable	Same task list, built in one sitting.
`Apply the lead-time reference for contractor and material timing` (was 5.2.2, draft)	SOP checklist item under 5.2.1 (draft)	Outcome and SOP	It produces knowledge, not a list; the reference itself is checklist content.

Notes & Assumptions (continued)

NOTES & ASSUMPTIONS

Naming changes applied at condense

- "Create the schedule draft" became "Build out the job task list": the principal and Connor both say "build out".
- "Confirm the recurring obligations" became "Check off the recurring obligations": the source says "check".
- "Derive the owner-facing schedule from the baseline" became "Build the owner-facing schedule in the client-facing project": nobody said it is derived.
- Left unchanged: "Solicit and collect trade bids"; the dispute is who sends them, not whether it happens.

Assumptions to verify

- **Principal** means Patrick. No source states his title; he acts as owner and general manager. **Owner** means the client.
- **Superintendent** is the single role for both Tom and Connor.
- **Office Manager** appears only in shared takeoffs. The sources spell her surname two ways, so the map leaves the name out.
- The takeoff software is written as **ConX under Houzz** per the office session; Tom's transcript garbles it. Question 8.
- Unhappy paths are mostly absent from the sources. Three are now `gap` activities (3.1.3, 5.2.2, 2.2.4); a bid too high, an owner rejecting the budget, and a review ending in disagreement stay open.
- Phase 1 has no acceptance criteria because none exists. This is the workflow's headline finding.
- The Phase 5 handoff is the same person handing to himself today. It becomes real once one superintendent runs two jobs.

Notes & Assumptions (continued)

NOTES & ASSUMPTIONS

Quality checklist

- [x] No names in any Title, Role, or Sub-function.
- [x] Titles follow the naming rules; activities start with a verb and stay under 15 words.
- [x] Every activity has all six fields; handoff acceptance criteria are stated or marked **UNKNOWN**.
- [x] 18 numbered questions, one `?` each, every `[P#]` tag inside P1 to P5.

Questions consolidated to another map

- Entry trigger, the start-date confirmation at 1.1.2, and written acceptance criteria for the office-to-field handoff → asked at office-bidding-lifecycle-workflow question 9.
- Whether Phases 2 and 3 are superintendent work, who writes scopes, who builds the budget → asked at office-bidding-lifecycle-workflow question 3.
- The single end state for pre-construction (contract, permits, or dirt moving) → asked at office-bidding-lifecycle-workflow question 1.
- Whether a manufacturer installation kickoff should be committed for high-risk assemblies → asked at field-execution-workflow question 9 (see 5.2.3).