

General-contractor systems checklist

A general-contractor workflow planning worksheet. Operational guidance only; the GC and qualified professionals retain responsibility for estimating decisions, engineering, permits and site safety.

FOLLOW ONE PROJECT FROM BID TO CLOSEOUT

- ☐ Record the opportunity, owner, estimate version and bid decision.
- ☐ Name the approved source for budgets, schedules, drawings and contracts.
- ☐ Map subcontractor onboarding, documents and renewal reminders.
- ☐ Identify who reviews RFIs, submittals and change orders.
- ☐ Reconcile approved changes to project-cost reporting.
- ☐ Define owner reporting, punch-list completion and handover.

INTEGRATION CHECKS

- ☐ Which construction, accounting and document systems are licensed?
- ☐ Are APIs, export rights and sandbox access available?
- ☐ What happens when a connection fails or a field user is offline?
- ☐ Who reconciles duplicate vendors, project codes and cost codes?
- ☐ Which approvals must remain with the project team?

PILOT SCOPE

One project or business unit: Two priority handoffs: Data owner: Approval owner: Current baseline: Acceptance tests: Training and support:

Never use an automation output as an unreviewed engineering or safety decision.