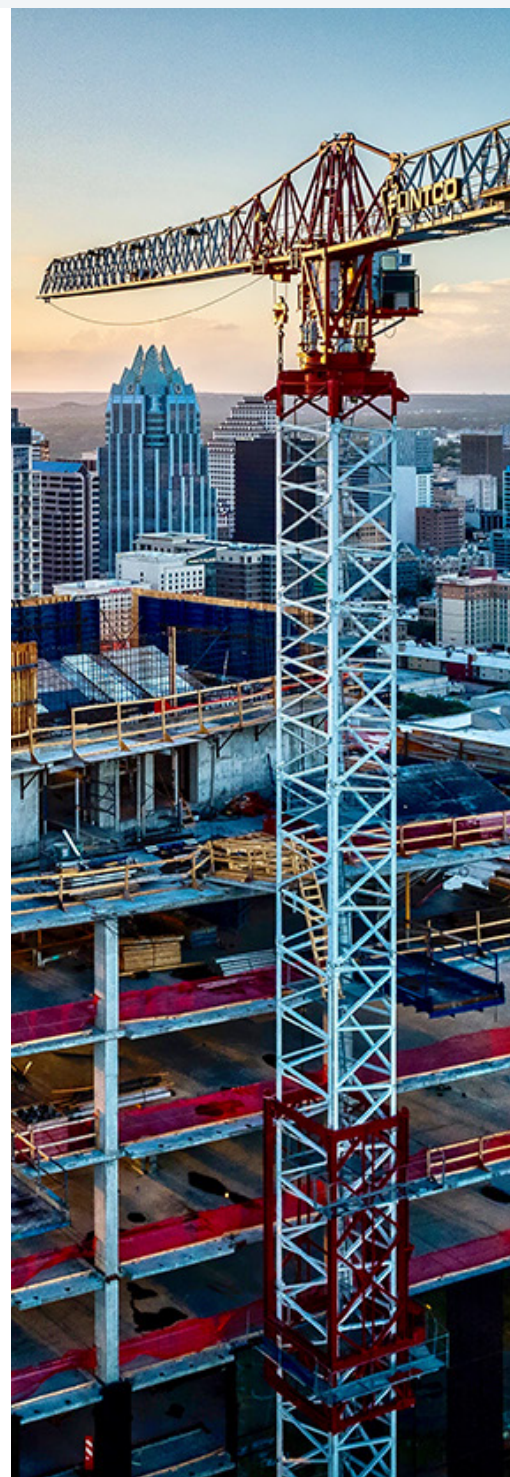


# How to Master Your Closeout Process - Advice for Subcontractors by Subcontractors

At our closeout strategies meetup, attendees broke apart into three groups to ask questions and discuss their own closeout processes. Here's what we learned.

## Q What have you done to speed up or make your closeout process easier?

- ❏ One sub explained a tactic that has been extremely helpful to her. She puts in her contracts that change orders must be processed in the same month that the work is done, and so far, she hasn't had a GC mark it out.
- ❏ Don't forget that some documents may take a while to get, so factor those document lead times into your greater closeout timeline.
- ❏ They also think it's critical to define who on your team will have direct contact with the GC on a daily basis.
- ❏ [Kyle Follett](#), VP of Finance for Sparr Envelope, insisted that the best closeout starts at the beginning of the project. Before you even finalize that contract, get the right people in the room to ensure transparency around all expectations. Revise your scope if need be so everything is clear and concise.
- ❏ Speaking to the importance of proactivity, another sub added that the closeout process should be in place before you ever step foot on the jobsite.
- ❏ One sub recommended using walkthroughs to identify things that might slip through the cracks of a closeout checklist. Unexpected things come up when you're on site, so it's an opportunity to get different information that may not be on your list. Once you've identified those issues, you can generate an email based on that punch walk or find time in a meeting to bring up those revisions.
- ❏ [Donny Metcalf](#), Senior Estimator and Project Manager at Lochridge-Priest Electrical, advises you to set your closeout process up at the same time you're doing your submittals. He also clarifies with the GC whether they want their submittals turned in by section, so that the whole submittal package doesn't get held up by individual submittals that are taking a long time. The same principle can apply to closeouts. Ask their preference upfront to clear up their expectations.
- ❏ For her closeouts, Hidalgo has to send warranty information on all the materials used in the work she did on the job. She's taken to uploading all the warranties for the products she used as PDFs, then compiling them into a single eBook link that she sends to her customer.
- ❏ A concrete sub mentioned the different classifications of concrete finishes, and how important it is to reiterate to your customer the quality of the finish they've agreed to in their contract. Sometimes a GC or owner will suddenly expect a higher quality than he was contracted to deliver. Upfront communication can help prevent those issues before they start.





## Q How do you clean up your closeout documents to make them more appealing for GCs?

- One sub advises you to continuously iterate and perfect your closeout process, from a presentation perspective and beyond. Making small tweaks to make everything look better will add up over time.
- A GC present at the Meetup mentioned a requirement that his firm actively imposes on subs, which may be beneficial for subs to adopt on their own. They request a daily update on the project from every sub in the form of a polished powerpoint with company logos. It's shipped off at the end of their shift as an email update on how far along they got. The GC then shares that with the owner.

## Q What technology do you use to support your closeout process?

- One attendee who worked on the GC side for 8 years endorsed [Raken](#) as a great way for subs to keep a bird's eye view on their project. They can figure out what documents are missing, who they need to coordinate with, track time cards, materials, safety inspections, and put all that information into a professional-looking report to keep their project stakeholders in the loop. Raken was made for people who work in the field, rather than making subs adapt to a software that wasn't built for their industry.
- [Monday.com](#) was another recommendation from one of our subs, who prefers it over some of the other project management software he's tried.
- Another software tool that Hidalgo tried is called [StructionSite](#), a tool that uses a 360-degree camera that ties to the project floorplan, so that you have an excellent record of the condition of your work. Especially as other trades come back and do their own punch lists, creating an opportunity for your work to be damaged.

## Q What else do you do at the end of a project to strengthen GC relationships?

- One newer sub expressed uncertainty that she could just approach the GC with direct questions she had about the process, and that's an important point to reinforce. Don't be afraid to ask the GC clarifying questions about what they want from you. Guessing is much worse than just raising your hand and speaking up.
- One Bay Area GC shared that they sometimes use boilerplate request forms to get what they need from subs, and may even look to the sub for guidance on what closeout documentation they should provide. To that end, be willing to share your intel with the GC if they ask for it. This particular GC was getting in the habit of establishing what documents were needed at the beginning of the job, then incorporating those requirements into their project management software.
- Consider giving a gift to a GC or superintendents at the end of a job. One sub sent a bottle of bourbon to a few superintendents who unloaded materials on her team's behalf, because they couldn't get their crews there on time.

**No matter what hiccups happen throughout the project, a closeout is your moment to finish strong. Be intentional, strategic and methodical in how you approach closeouts, and it will pay big dividends down the line.**