View the Briarwood demonstration job in JobTread →

FOLLOW THE REMODEL. LEARN THE WORKFLOW.

The proposal is approved. Now what?

The Briarwood family has chosen you to remodel their kitchen and primary bath. They are excited. Your job is to turn that approval into clear decisions, coordinated work, and a customer who knows what happens next.

Then Avery asks: **“Could we choose the Natural cabinets instead of Warm White?”**

That one question is the thread through this walkthrough. You will compare the options, explain the price, record the decision, prepare purchasing, review the schedule, and keep Avery informed.

THE STORY YOU WILL FOLLOW

1	**Scope & proposal** Establish what is included.	p. 2
2	**Customer welcome** Give Avery a clear starting point.	p. 3
3	**Selections** Compare finishes, prices and deadlines.	p. 4
4	**Change control** Explain and document the $1,857.14 upgrade.	p. 5
5	**Purchasing** Prepare the verified order package.	p. 6
6	**Scheduling** Connect decisions, owners and readiness.	p. 7
7	**Project updates** Work through a sample delivery delay.	p. 8
8	**Closeout** Verify corrections and hand over the record.	p. 9

HOW EACH PAGE WORKS

Open Briarwood in JobTread beside this guide. Each page follows the same order: **story**, **screenshot** (numbered callouts match the text), **JobTread location**, **numbered actions**, **who acts next**, and a **checkpoint** to confirm before you move on.

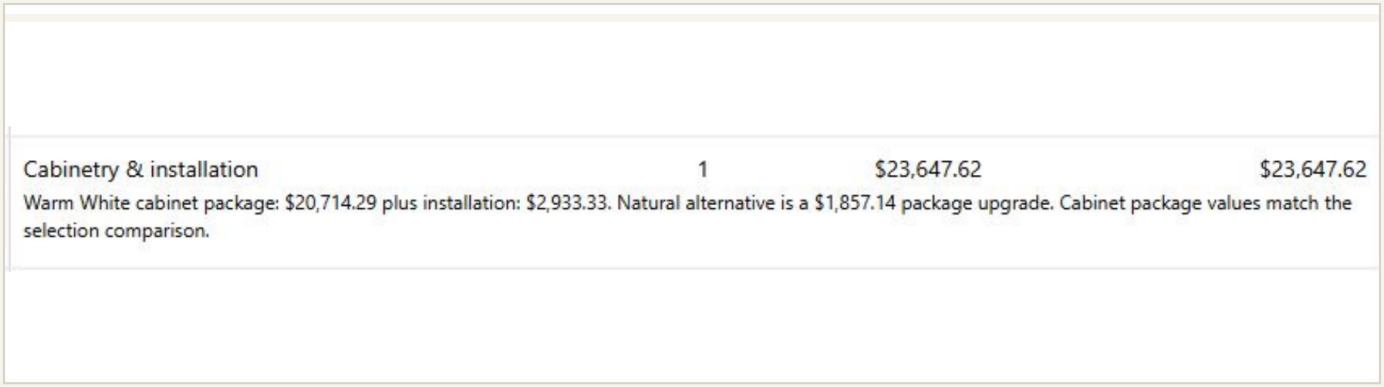
The story illustrates a completed workflow. The live proposal, change order, and purchase order remain drafts, and the job remains in preconstruction. Screenshots show the current demo, not completed approvals or construction. Dates and prices are illustrative. These steps require people to act; automatic approvals or ordering have not been configured.

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01 / ESTABLISH THE STARTING POINT

Know what Avery bought.

Set a clear baseline before you discuss an upgrade. Avery's starting cabinet package is Warm White. Installation is a separate part of the scope.



Cabinetry & installation	1	$23,647.62	$23,647.62

Warm White cabinet package: $20,714.29 plus installation: $2,933.33. Natural alternative is a $1,857.14 package upgrade. Cabinet package values match the selection comparison.

LOOK HERE: The cabinet scope separates the $20,714.29 package from $2,933.33 installation. The Natural option changes the package price only.

IN JOBTREAD DOCUMENTS > PROPOSAL BRI-001-10

1. **Review the scope.** Confirm the kitchen and bath work, quantities, included finishes, exclusions, and installation responsibilities.
2. **Match the included choices.** Check that the proposal baseline matches the selections. Do not treat every alternative as another included charge.
3. **Establish the actual job baseline.** After real acceptance, reconcile the approved proposal and budget once. This draft proposal is a teaching sample and is excluded from the live budget.

MELISSA'S IMPLEMENTATION NOTE

Start with one agreed baseline. Compare every alternative with what the customer already bought.

WHO ACTS NEXT Contractor confirms the baseline, then gives the homeowner a clear first assignment.

BEFORE YOU MOVE FORWARD

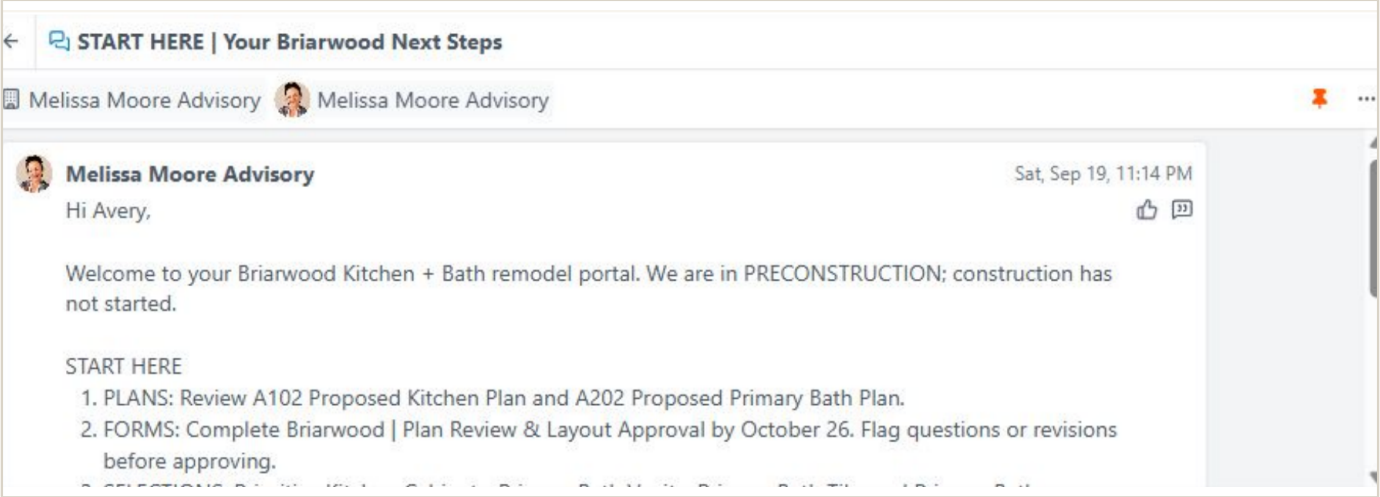
The actual scope and commercial terms are accepted, and the job budget reflects that agreed baseline.

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02 / TURN APPROVAL INTO A CLEAR WELCOME

Show Avery where to start.

The proposal has been accepted. Avery's next question is simple: "What do you need from me?" A useful welcome answers it before Avery has to ask.



HOMEOWNER VIEW: A pinned welcome gives the project one recognizable starting point.

IN JOBTREAD **DASHBOARD / MESSAGES, THEN PLANS AND FORMS**

1. **Check the customer view.** Verify the correct job, plans, forms, and documents are visible before inviting a real customer.
2. **Pin a welcome.** Tell the customer where to start, what to review, the response deadline, and where to ask questions.
3. **Give one first assignment.** For Briarwood: review the proposed kitchen and bath layouts, then submit Plan Review & Layout Approval by October 26.

EXAMPLE AFTER PROPOSAL APPROVAL

"We're excited to get started. Your first step is to review the proposed room layouts in Plans and complete the plan review form. Please flag questions before approving so we can resolve them before ordering."

WHO ACTS NEXT Avery reviews the plans; the contractor resolves questions and confirms the response.

BEFORE YOU MOVE FORWARD

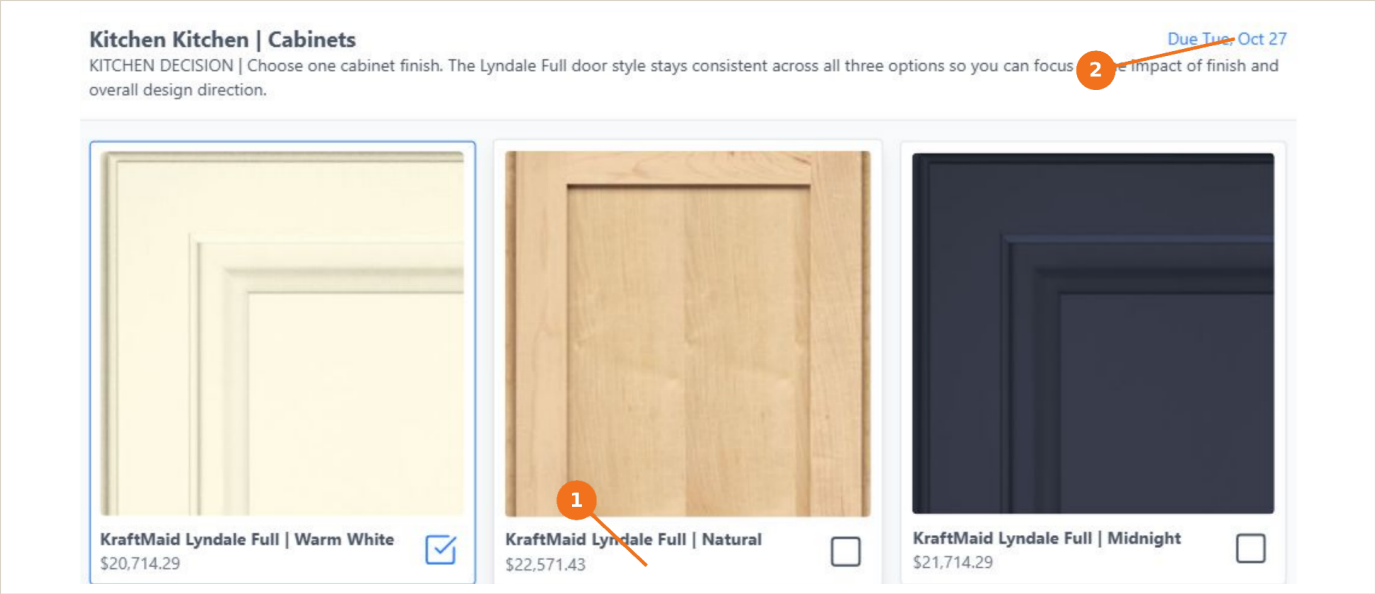
Avery can access the right information, understands the first assignment, and knows how to ask for help.

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03 / MAKE THE CABINET DECISION EASY TO UNDERSTAND

Avery asks for Natural cabinets.

Three finish options share one door style. Show the choices together with photos, prices, and a deadline instead of sending a product name and hoping Avery understands.



1 Compare the Natural package price. **2** Check the decision deadline.

IN JOBTREAD **SELECTIONS > KITCHEN | CABINETS**

1. **Compare the package (callout 1).** Explain the door style, finish, price and inclusions. Review the design board so Avery understands the whole palette.
2. **Explain the deadline (callout 2).** Cabinets are due October 27. Explain which ordering and installation decisions depend on that response.
3. **Keep questions with the decision.** Use the selection discussion to resolve questions before you document the price change and approval.

WHO ACTS NEXT Avery asks or chooses; the contractor confirms the price and timing impact.

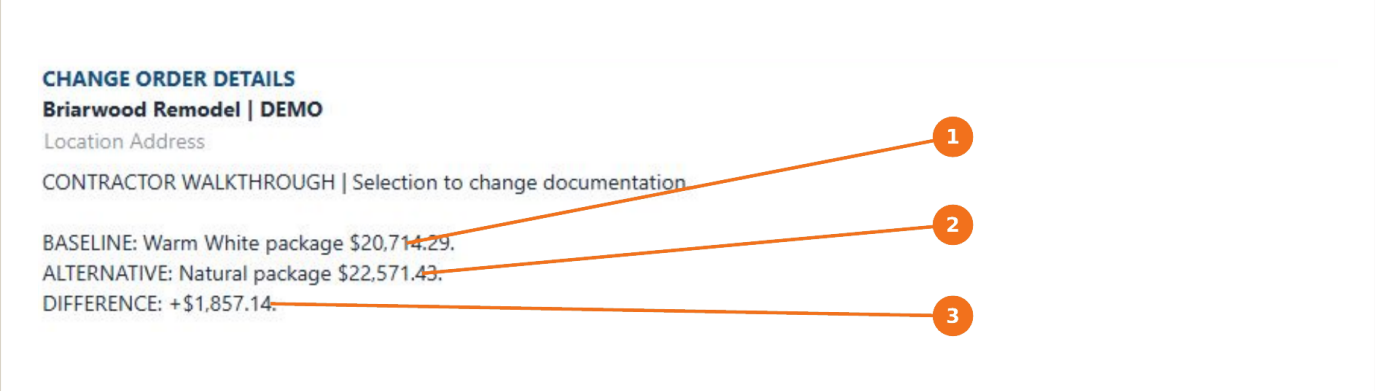
BEFORE YOU MOVE FORWARD
The choice is clear, open questions are resolved, and any contract price or timing impact has been explained before approval.

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04 / MAKE THE PRICE CHANGE EXPLICIT

“What will that upgrade cost?”

Warm White is $20,714.29. Natural is $22,571.43. Avery’s proposed upgrade is **$1,857.14**. Explain the change once and get the required approval before committing.



1 Included package. **2** Proposed alternative. **3** Customer price difference.

IN JOBTREAD **DOCUMENTS > CHANGE ORDER BRI-001-11**

1. **Confirm the contract impact.** Determine how the selected alternative is handled under the actual contract and your selection process.
2. **Document the difference.** Identify what changes, its customer price, and any confirmed schedule impact. This sample change order records +$1,857.14, not another full cabinet package.
3. **Record actual approval.** Obtain the required customer approval through the appropriate document or selection process. Reconcile the change once; do not count it twice.

MELISSA’S IMPLEMENTATION NOTE

A selection and a change document should tell one pricing story. Reconcile the upgrade once so you do not charge for the same difference twice.

WHO ACTS NEXT Avery gives the required approval; the purchasing owner verifies the order package.

BEFORE YOU MOVE FORWARD

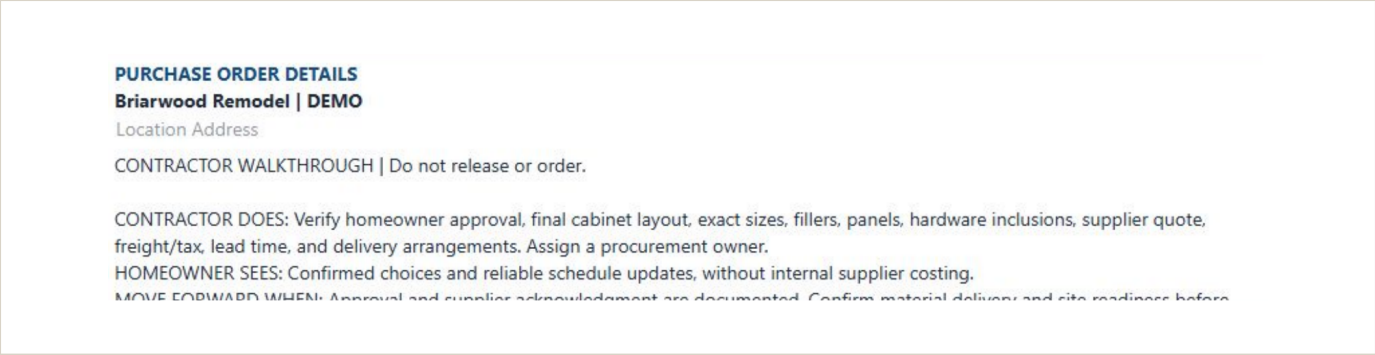
The homeowner’s required selection and change approvals are recorded, and the updated scope and customer price agree.

View the Briarwood demonstration job in JobTread >

05 / TURN AN APPROVED DECISION INTO AN ORDER

Now the office can act.

Continue after the real approvals are in place. The selected finish is Natural. Your purchasing record must translate that decision into exactly what the supplier is expected to provide.


PURCHASE ORDER DETAILS
Briarwood Remodel | DEMO
Location Address
CONTRACTOR WALKTHROUGH | Do not release or order.

CONTRACTOR DOES: Verify homeowner approval, final cabinet layout, exact sizes, fillers, panels, hardware inclusions, supplier quote, freight/tax, lead time, and delivery arrangements. Assign a procurement owner.
HOMEOWNER SEES: Confirmed choices and reliable schedule updates, without internal supplier costing.

CONTRACTOR VIEW: The draft purchase order is a preparation example, held for approval and verification.

IN JOBTREAD DOCUMENTS > PURCHASE ORDER BRI-001-12

1. **Verify the package.** Check the approved finish and layout, shop drawings, quantities, quote, freight, tax and delivery arrangements.
2. **Name the owner.** One person follows the order through supplier acknowledgment and delivery. In a small company, that may be you.
3. **Confirm readiness.** Check delivery, storage, damage reporting and site readiness before promising installation.

SAMPLE PROCUREMENT CHECK | A USEFUL HOLD RECORD

Finish / layout	Natural; approved package identified for review.
Order owner	Purchasing lead; tracks the supplier response.
Delivery status	Awaiting supplier acknowledgment.
Release decision	**HOLD** until approval and order checks are complete.

WHO ACTS NEXT Supplier confirms the order; the project manager coordinates delivery and installation.

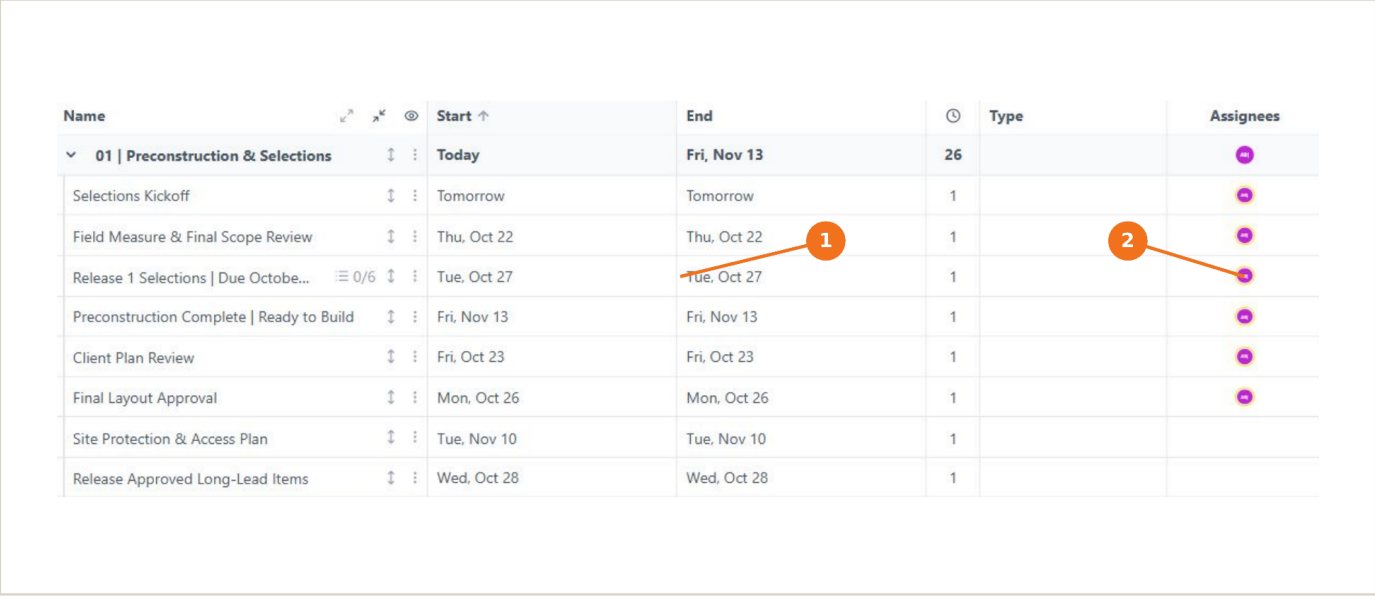
BEFORE YOU MOVE FORWARD
Actual approvals, the verified order package, supplier acknowledgment, and delivery arrangements are documented before release.

View the Briarwood demonstration job in JobTread >

06 / KEEP WORK AND COMMUNICATION CONNECTED

Make the next step visible.

With choices and purchasing organized, you need a reliable plan for what happens next. Use the schedule to connect decisions, ordering, and readiness, then explain the current priorities to Avery.



Name	Start	End		Type	Assignees
01 | Preconstruction & Selections	Today	Fri, Nov 13	26		
Selections Kickoff	Tomorrow	Tomorrow	1		
Field Measure & Final Scope Review	Thu, Oct 22	Thu, Oct 22	1		
Release 1 Selections | Due Octobe... 0/6	Tue, Oct 27	Tue, Oct 27	1		
Preconstruction Complete | Ready to Build	Fri, Nov 13	Fri, Nov 13	1		
Client Plan Review	Fri, Oct 23	Fri, Oct 23	1		
Final Layout Approval	Mon, Oct 26	Mon, Oct 26	1		
Site Protection & Access Plan	Tue, Nov 10	Tue, Nov 10	1		
Release Approved Long-Lead Items	Wed, Oct 28	Wed, Oct 28	1		

1 Review the decision date. **2** Verify who is responsible for the task.

IN JOBTREAD **SCHEDULE, DAILY LOGS AND PROJECT MESSAGES**

1. **Assign responsibility (callout 2).** Every important task needs an owner, deadline and definition of done.
2. **Review the date (callout 1).** Check approvals, procurement and readiness before reporting that work is on track.
3. **Tell Avery the next action.** Explain progress, blockers, next steps and customer decisions. Use actual site photos for actual work.

WHO ACTS NEXT The task owner updates the record; the project manager communicates the current plan.

BEFORE YOU MOVE FORWARD
The schedule and latest message agree, and every open issue has an owner and a next action.

View the Briarwood demonstration job in JobTread >

07 / HANDLE A PROBLEM WITHOUT LOSING THE CUSTOMER

The cabinets may arrive late.

Hypothetical training scenario: expected delivery moves from December 4 to December 9. Cabinet installation is planned for December 7. You now have a coordination problem to manage.

IN JOBTREAD PROCUREMENT TASK, SCHEDULE AND MESSAGES

1. **Verify what changed.** Ask the supplier for the current delivery estimate, what is affected, and the next confirmation date. Separate an estimate from a committed date.
2. **Review the affected work.** Check the installer, site readiness, countertop template, and any other work that depends on the cabinets. Identify work that can safely continue.
3. **Give the issue an owner.** Record who is following up and when. Revise the affected tasks after reviewing the sequence; do not rely on a calendar date alone.

EXAMPLE HOMEOWNER MESSAGE | SAMPLE ONLY

“Hi Avery, the supplier’s latest estimate puts cabinet delivery on December 9, which affects our planned December 7 installation. I’m confirming availability with the installer and checking the work that follows before setting a revised start. I’ll update you by 3 p.m. tomorrow. You do not need to make another selection right now.”

WHAT THIS TEACHES THE CONTRACTOR

A reassuring update names the issue, explains the next action, sets a follow-up time, and tells the customer whether they need to act. Record and send the update through your normal project communication process.

WHO ACTS NEXT Purchasing verifies the supplier update; the project manager coordinates and informs Avery.

BEFORE YOU MOVE FORWARD

The revised sequence is reviewed, affected people have confirmed their part, and the customer has received a clear update.

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08 / CLOSE THE LOOP

The cabinets are installed. Finish well.

Future-stage example: during the walkthrough, Avery notices a drawer front that needs alignment. A clear correction process keeps that small issue from becoming weeks of follow-up.

IN JOBTREAD PUNCH TASKS, FILES AND PROJECT MESSAGES

1. **Create a specific punch record.** Name the room and exact location. Describe the correction, assign the responsible trade, set a due date, and attach a reference photo.
2. **Require useful completion evidence.** Ask for a photo of the same location and a short correction note. Have the project team verify alignment and operation before closing the item.
3. **Give Avery a clear status.** Explain what remains, who is handling it, and the expected next update. Avoid asking the homeowner to coordinate the trade.
4. **Hand over the project record.** Provide the final finish schedule, product details, manufacturer care and warranty instructions, remaining-item status, and the contact process for concerns.

SAMPLE PUNCH RECORD | A SPECIFIC RECORD IS EASIER TO CLOSE

Location / issue	Kitchen drawer base B03; uneven front alignment.
Owner / action	Cabinet installer adjusts the front and runner.
Required evidence	Same-view before/after photos and correction note.
Review / status	Project manager verifies operation before closure.

WHO ACTS NEXT The installer documents the correction; the project manager verifies and updates Avery.

BEFORE YOU MOVE FORWARD

Actual corrections are verified, remaining obligations are clear, and the customer has the final records and support instructions.

YOUR FIRST IMPLEMENTATION CHECKLIST

Build the flow for one pilot job.

You do not need to configure everything at once. Start with one job and make sure the handoffs work for your team and your customer.

1. **Define your real stages.** ☐
   Write down how work moves from proposal acceptance through selections, purchasing, construction, and closeout.
2. **Name the owner at each handoff.** ☐
   Identify who prepares, reviews, approves, orders, follows up, and verifies completion. One person can hold several roles.
3. **Prepare the working examples.** ☐
   Use a clear proposal baseline, comparable selections, a change example, an order checklist, a useful update, and a punch record.
4. **Set decision deadlines from the work.** ☐
   Work backward from procurement and installation needs, then confirm actual supplier lead times before promising dates.
5. **Verify every audience.** ☐
   Check the internal, homeowner, and vendor views using the intended role. Confirm the correct records are accessible.
6. **Walk one decision through the process.** ☐
   Can you trace the cabinet choice, its price impact, required approval, purchasing action, delivery confirmation, and installation readiness?
7. **Review the customer's first visit.** ☐
   Can the customer find where to start, what is due, and how to ask a question without calling you for directions?
8. **Test with one pilot before repeating.** ☐
   Resolve missing ownership, confusing wording, duplicate charges, irrelevant forms, or unclear visibility before adapting the process to more jobs.

THE GOAL

Your team can explain what happens next, and your customer can follow the job with confidence.