

Your checklist for smarter workflows and stronger decisions

# Proactive project leadership playbook

Chasing updates. Reconciling systems. Missed communications. That used to be construction project management—but not anymore.

Proactive leadership is about:

- Clarity
- Defined workflows
- Up-to-date progress



## 01

### Link everything in a connected project record

**A single, shared project record is the first step to eliminating information silos between field and office teams.**

- Use ONE system where drawings, RFIs, changes and issues are always connected and current
- Make field capture immediate with mobile tools—no more handoffs or rework
- Link project records to create an automatic trail from issue to resolution

**Example in action**

An issue found onsite becomes an RFI linked to a drawing, then flows into a potential change order (PCO) tied to a specific scope or cost impact. Everything is tracked in one system to reduce risk and manual handoffs.

## 02

### Design for action, not oversight

**Once your project data is centralized, the next step is accountability. Clear task ownership helps ensure critical issues and approvals don't fall through the cracks.**

- Set clear task assignments and due dates across RFIs, submittals and approvals
- See what's overdue or unresolved using a centralized dashboard
- Eliminate manual tracking with system-generated alerts and history logs

**Tip**

Use ONE dynamic to-do panel across roles to reduce handoffs and status calls.



Did you know? **Construction rework accounts for 5% of total construction spending**, adding up to \$65 billion annually

## 03

### Safeguard your margin. Establish field-to-finance continuity.

**When field activity flows directly into cost and schedule visibility, you can forecast risk earlier and protect your margins in real time.**

- Use system links (not re-entry) between RFIs, submittals and PCOs
- Track changes through your workflow to spot impacts early
- Forecast risk based on what's happening now—not last month's report

## 04

### Standardize how decisions are made—and tracked

**Once workflows are in place and tied to cost and schedule, the final step is bringing consistency to how decisions are reviewed, approved and logged across your portfolio.**

- Replace one-off emails and PDFs with structured, time-stamped workflows
- Use approval routing, permissions and audit logs to standardize processes
- Gain visibility across all active projects—without manual reporting

**The outcome**

- Consistent execution across your entire portfolio
- Reduced financial risk
- Easy access to audit-ready records.

## Fight complexity with clarity

**Proactive leadership isn't just a trait.**

It's a system built around clarity, visibility and connected action. Start by connecting your workflows—so updates, tasks and decisions stay current and visible, without the daily chasing. See the workflows in action—from field updates to approvals.

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