

## OPERATING DESIGN WORKBOOK

# Construction Operations Systems Blueprint

Map one job cycle, name each handoff owner, define readiness rules, and test one small improvement. Odoo is a candidate system to evaluate against the operating model, not a substitute for an agreed process.

**01 Map**

Connect the job records.

**02 Control**

Release work with evidence.

**03 Pilot**

Improve one handoff.

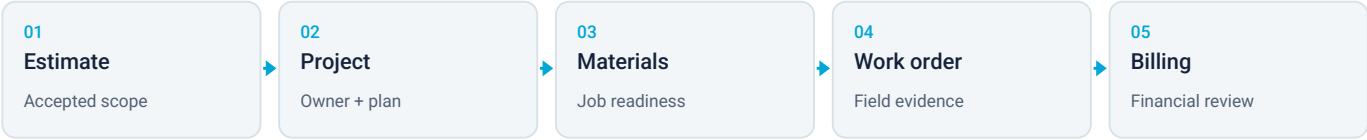


A practical, evidence-led guide for business owners and teams

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# Give every handoff a reliable record

Choose one recurring job type and agree where the evidence for each decision lives. One job reference should connect the accepted scope to delivery, exceptions, and billing review.



| HANDOFF RECORD    | MINIMUM INFORMATION TO CARRY                                    | NEXT OWNER        | ODOO AREAS TO EVALUATE  |
|-------------------|-----------------------------------------------------------------|-------------------|-------------------------|
| Approved estimate | Revision, scope, quantities, exclusions, acceptance reference.  | Sales / estimator | Sales                   |
| Job / project     | Customer, site, phase, scope reference, delivery owner.         | Project manager   | Project                 |
| Work order        | Job/phase, task, crew, access, readiness status.                | Dispatcher        | Field Service / Project |
| Material request  | Job/phase, item, quantity, need date, approval.                 | Purchasing        | Inventory / Purchase    |
| Completion record | Work completed, photos/notes, labor/material refs, open issues. | Field lead        | Field Service / Project |
| Change record     | Reason, scope, cost/time impact, approval status/reference.     | Project manager   | Sales / Project         |
| Billing review    | Contract basis, completion evidence, authorized changes, holds. | Billing owner     | Accounting              |

CHOOSE THE SOURCE OF TRUTH BY DECISION

For each field, name the authoritative record and the role that maintains it. Do not assume that every detail belongs in one app or that an app mapping is fixed before the process is tested.

# Release work only when ready

A scheduled date is not evidence that a job is safe or complete enough to advance. Use the checks that apply to the job and identify who verifies them before each handoff.

BEFORE DISPATCH / RELEASE

Confirm the job can start.

☐ Approved scope and current revision are available.

☐ Site access and predecessor work are confirmed.

☐ People, qualifications, equipment, and materials are checked.

☐ Required permits, inspections, or customer approvals have a verifier.

BEFORE MARKING COMPLETE

Confirm work and exceptions are visible.

☐ Field lead records actual work and required evidence.

☐ Incomplete work, damage, rework, or return visits have an owner.

☐ Time and material records reference the right job and phase.

☐ Billing review, inspection, next phase, or return visit has an owner.

DEFINE THE BLOCKING RULE

Name the condition that blocks release, the verifier, and the evidence required to clear it. A schedule date never overrides an applicable safety or regulatory prerequisite.

| BLOCKING CONDITION                                                                    | VERIFIER | EVIDENCE REQUIRED |
|---------------------------------------------------------------------------------------|----------|-------------------|
| <div>ONE JOB ID / APPROVED SCOPE RECORD / CURRENT SCHEDULE / HANDOFF TO CLARIFY</div> |          |                   |

03 / EXCEPTIONS AND BILLING

# Keep exceptions from disappearing

Define the exception route alongside the normal workflow. Record what happened, who owns the next decision, and what evidence is needed before work or billing proceeds.

| EXCEPTION                   | CONTROL POINT                                                                                           | NEXT OWNER      |
|-----------------------------|---------------------------------------------------------------------------------------------------------|-----------------|
| Material shortage           | Record shortage and job impact; confirm substitute or revised plan before use.                          | Purchasing + PM |
| Customer scope request      | Create a change record; confirm authorization under the agreement before treating it as approved scope. | PM / Sales      |
| Incomplete or reworked task | Keep an open item and the reason; separate it from verified completion.                                 | Field lead + PM |
| Billing discrepancy         | Hold the disputed item; reconcile scope, evidence, quantities, and agreed billing basis.                | Billing + PM    |

**BILLING-READY MEANS EVIDENCE-READY**

Agree on the billing trigger for each contract or service type. Confirm customer, job reference, authorized scope, completion or milestone evidence, and approved changes. Field completion alone does not automatically authorize an invoice.

**ILLUSTRATIVE EXAMPLE / NOT A CLIENT RESULT**

A crew completes the original task and receives an additional request. The original work may enter billing review while the unapproved request remains a separate open change. The contract and internal approval rules determine the next action.

| BILLING TRIGGER | EVIDENCE REQUIRED | WHO RELEASES HOLD |
|-----------------|-------------------|-------------------|
|                 |                   |                   |

## 04 / PILOT AND REVIEW

# Turn the map into one improvement pilot

Choose one job type or one handoff. Define the baseline and sample before starting; the pilot is a short test of usability, not proof of long-term performance.

| MEASURE                   | DEFINITION TO AGREE BEFORE THE PILOT                                                          |
|---------------------------|-----------------------------------------------------------------------------------------------|
| Handoff delay             | Elapsed time from a defined release event to acknowledgment by the next owner.                |
| Missing information       | Reviewed handoffs missing at least one required field / handoffs reviewed.                    |
| Billing preparation delay | Time from evidence-ready status to submission for billing review.                             |
| Reopened work             | Completed records reopened for missing or incorrect information / completed records reviewed. |

## PILOT DESIGN

JOB TYPE / HANDOFF / ACCOUNTABLE OWNER

START AND REVIEW DATES

BASELINE SOURCE / SAMPLE SIZE / PERIOD / OBSERVED PROBLEM

ACCEPTANCE RULE: WHAT EVIDENCE WOULD MAKE THIS PILOT USEFUL?

## REVIEW DECISION

Expand only if the team can follow the process, exceptions have owners, and the agreed evidence supports the change. Otherwise revise the scope or stop the pilot; record open risks and the next decision owner.



BRING YOUR COMPLETED BLUEPRINT TO A FOCUSED CONVERSATION

Discuss your workflow with InnovanSIS

[innovansis.com/contactus](https://innovansis.com/contactus)

Original InnovanSIS operating-design framework. It does not prescribe construction code, safety, accounting, or contract compliance.

## INNOVATION &amp; SYSTEMS

# From business vision to intelligent execution

InnovanSIS helps organizations turn business priorities into clear processes, capable teams, and connected technology.

## WHO WE ARE

## A practical partner for better operations

We start by understanding how work moves through the business. Then we help shape the processes, responsibilities, and systems that make execution easier to see, manage, and improve.

01

### Clarify the work

Map the handoffs, decisions, and information your team needs to deliver consistently.

02

### Connect the system

Use Odoo ERP to bring core workflows and business information into a shared operating environment.

03

### Enable the team

Give people practical roles, routines, and guidance to put the new process into daily use.



## ODOO ERP

### Technology should support the way work needs to happen.

InnovanSIS approaches Odoo as an adaptable platform for connected operations. The focus is on fit: define the process, configure the system around it, and help the team adopt it.

*"Every great business starts with a vision, a vision to make profits, to innovate, a vision to grow, and to make a lasting impact. But the truth is, a vision alone is not enough. Success comes when we transform that vision into action, fueled by streamlined processes, empowered teams, and smart technology. That's where Odoo ERP becomes a game-changer. It's not just software; it's a gateway to operational excellence."*

Armando Robert Lobo  
Founder & CEO, InnovanSIS LLC

