CLOSEOUT docs™

- automated closeout
- interactive deliverables
- centralized submissions

THE NEW CONSTRUCTION CLOSEOUT STANDARD: MORE EFFICIENCY & STRUCTURE, LESS RISK

Closeout documentation is messy, time-consuming, often unreliable, and always critical. It can create a smooth handoff from general contractor to owner and ensure safe, efficient building operations. Or it can open a Pandora's box of questions which, at worst, can lead to costly disputes.

Most people just cut to the chase and say that "closeout is a necessary, but annoying pain in the butt."

You know the challenges of collecting closeout documentation for a building project:

- Chasing down subcontractors for documentation, often when they've moved on to other jobs.

- Manually labeling and organizing massive amounts of information, from as-builts and shop drawings to RFI and submittal responses.

- Updating as-built site verification by hand.

- Organizing (and deciphering) wildly different organization methods and document formats from multiple clients, subcontractors, and vendors.

- Cutting and pasting attachments from emails into a home-grown receptacle for storing them, recorded in excel, by hand. Or, logging into software from a massive company from silicon valley, with no support for closeout.

- Assembling everything by deadline to ensure on-time payment, always initiated as the project is nearing the end, never updated as the subs depart the job site.

- Relying heavily on subs to submit their paperwork accurately several months after they've completed their work.

And when you finally do wrestle these challenges to the ground? You're left with a pile of binders, and random digital files while you cross your fingers that nothing has slipped through the cracks. But despite everyone's best efforts, the cracks are usually there.

You know the problems this can cause:

- Inaccurate or incomplete as-builts that don't match what you're looking at – which can lead to costly delays, and disputes.

- While subs may have the best intentions, information is hard to find because documents aren't organized or labeled well.

- If you're using a third-party digital application, access might be blocked for new users who need the information quickly.

- The employee who is stuck organizing this information was not there since the projects inception, forced to chase down others who have left the job trailer, not certain of the details they are checking.

- The most crucial (technical, mechanical) documentation was provided by contractors who have moved onto other projects.

- The owner is not going to pay for close out until it is accurate and complete.

Our experience shows that 9 of 10 project closeouts have inconsistent methods of document collection and organization that create delays and add costs to both contractor and owner.

"...most of the time the person who is stuck gathering documentation for closeout, is a 23-year old, who just arrived at the job site six months ago, while the guys who actually built it have moved onto the next project!"

A 2021 study of construction disputes by Arcadis, the worldwide consulting firm, said that in 2021 the average dispute in North America was valued at $37.9 million and took 14.2 months to resolve. Two of the most impactful ways Arcadis identified to resolve these very costly claims: minimize errors and omissions and supply proper documentation.

Report: Cost of construction disputes increased dramatically in 2020 (Katie Lawler)

So why are closeout documents so hard to do right? It's not the technology you're using or the team you're working with. It's a lack of closeout standards that can be followed consistently, accurately, and efficiently.

It doesn't have to be this way.

CURRENT OPTIONS AND THEIR DRAWBACKS
Why do we need a better solution? Because current tools …

- Are not designed with the actual closeout collection process in mind.
- Are not designed with facility managers in mind.
- Do not provide a simple, consistent method for your subs to submit their materials
- Are not designed to create a streamlined, relational database, easily accessible to future teams seeking information.
- Are not affordable; and include monthly subscriptions and/or ongoing licensing fees, no matter the size of the project or business.

Web-based solutions for sharing, storing, and managing documents for the construction industry have been around a long time, with different products offering different benefits and conveniences. Some perform so many functions --- cost management, personnel expenses and managing submittals --- but they don't deliver a satisfying closeout process or a deliverable. You can find yourself paying a single price for many unnecessary functions, and project managers still wind up manually organizing subcontractor files.

>>>> **It's not the technology you're using or the team you're working with. It's a lack of closeout standards that can be followed consistently, accurately, and efficiently.**

So sure, *there are* some great tools in the construction industry for collecting, processing, and wrangling complex materials change-orders during a project, but once closeout time comes, you're on your own. Project team members, and owners, cross their fingers and hope it's all there when needed several months later.

OUR SOLUTION: CLOSEOUT DOCS

What if project managers could have a simple, secure method for collecting subcontractor files that requires no log-in or password and lets subcontractors to simply drag and drop documents into one set of folders--- THEIRS !

What if owners didn't have to re-organize closeout data for their facility managers?

What if facility managers could get a simple, user-friendly portal to easily pull documents, view 3D models, reference O&M manuals, and view digital progression photos chronologically?

What if this could all be done on time and accurately so that everyone gets paid when they're supposed to?

The solution to all of this is called Close Out Docs (COD).
COD is not just a software solution. COD providers are the same resources who have helped your business with document solutions for decades. We have "boots on the ground" with wonderful software tools, and we are not going away after you wrap up a project either.

What is Closeout Docs and how does it work?
COD uses Smart Automation to deliver a standardized, consistent format for all things related to the closeout process. Using automated alerts, easy upload tools, and intuitive tagging protocols, COD automates and expedites the act of collecting documentation. At closeout time, it's all handed over on a flash drive which replicates an interactive cloud-based e-book, designed for ease of use, tagged, and organized for your specific needs. All your information is digitally indexed in one intuitive database.

HERE'S WHY THE COD SOLUTION IS BETTER

- **Cost-efficient**. A one-time fee, typically $1,500, is based on the size of your project. No annual subscription, no monthly fees, no paying for functions you don't need. Compare the cost of COD to the 10% that's held back until closeout, and there's no question the investment will pay off.

- **Automated.** You eliminate data entry and save time through a system of automated alerts, requests, and reminders. The data is organized digitally through an automated system of standardized, pre-labeled folders.No cumbersome log-ins either.

- **Mobile.** Because project managers get project reports delivered to their email, they can use mobile devices to view, comment, accept or reject materials. No need to go into the office to view the day's mail delivery or sit at the computer.

- **Responsive.** With these tools for checking progress, you can share this information with Owner's Reps who are demanding these updates. The dynamic activity report is updated in real time, providing at-a-glance access to subcontractors' activity.

- **User-friendly.** Documents are consistently tagged and indexed by trade, document category, and project contractors who supplied them. Everything is accessible through an easy-to-use portal. Uploads are intuitive and efficient.

HERE'S WHY THE COD SOLUTION IS BETTER (continued)

- **Control.** Once the documents are collected the owner gets the entire archive. Every document or file is available within two clicks. Owners and their facility managers decide who has access, without going through a third-party application that require updates subscriptions or cumbersome passwords.

- **Ongoing support.** This information will evolve with the life of the building.Your COD provider is a local service bureau, equipped with a team of people that can update files, scan and submit new documents, provide printed materials, perform updated 3D scans of your space, and take documents or files and convert them to vectorize CAD/BIM files.

PLUS, A Bonus. Take Close out to the next level with 3D capture the actual structure "as built"

VizBuilt® scans

What we are providing with VizBuilt® building scans
The current state of the art, tagged re-capture of the building as it was built, using a scanner and a small workforce that will tag the images as requested and include this within the Closeout Docs e-book (Portal).

- Links – intelligence for the "new" Facility manager (Comfortable with the BIM walk-throughs)
- Workable design/edit tools for additional work: Up to 40% of scans* are converted to vector for CAD, BIM/Revit
- Tools to expedite maintenance services for building managers.
- Value-add to clients – improves their offering to THEIR Client.
- Value that helps owners reduce operating costs. VizBuilt® is the modern day as-built record for facility managers.
- Ability to secure 10% retainage, overcoming the dilemma with poor subcontractor documentation
- In an ideal circumstance, milestone scans can be recorded throughout construction, especially of mechanicals, potential "crashes", and recording prior to drywall.

*In our experience

THE NEW CLOSEOUT STANDARD = BETTER CLOSEOUTS = SMALLER RISKS.

Let's Review

Current Situation: No Closeout Standards

The process is time-consuming and inefficient for all parties.
The product is often incomplete, unreliable, and late.
The risks are high: costly disputes, lawsuits, and delays.

The New Standard: Close Out Docs

- Subcontractors are given an easy, intuitive tool for uploading documents AS THEY WRAP UP their portion of the project. You label the folders and they drop in their documents.

- The system updates you when folders are updated, and reminds subs to provide their files, automatically.

- Updates are passed along to the owners, managing expectations.

- Project managers spend less time on documentation and deliver the turnover package in an intuitively organized format.

- Owners and facility managers get an archive that's reliable, complete, accurate, user-friendly, and on time.

- VizBuilt® scans are added to create a Forensic, as-built recall of the building as is. Important mechanicals, safety access, exits, are tagged so that their owner manuals, warranty and service information is pulled up with one click from the COD database.

- The final submission can include thumb drives, a cloud based portal, printed versions of documents, and fully vectorized documents that can be used in Autocad, Revit, or your preferred application.

Disputes are eliminated or easily resolved. No costly delays, no costly courtrooms.

If you want to give your business an edge by offering a unique benefit that reduces risk for you and your customers, saves valuable time, and creates a new standard for the critical construction closeout process, please get in touch.

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