



Creating a Project Schedule: Step-by-Step

Why This Matters

The book puts it simply: "Your schedule is your map, your accountability, and your proof of process." A schedule isn't just a timeline of dates, it's the system that ties every trade, every payment, and every deadline together. Built right, it protects your cycle time. Built loosely, it becomes the thing everyone quietly stops trusting.

Leveraging software has us thinking of process mapping, and with integration of a schedule to payment approvals, accounting and the schedule must be aligned. The priority that works best? Build your production schedule, identify your pay points, and know how each integrates back into accounting.

Step 1: Build Your Cost Code Foundation First

- ☐ Start with an industry standard like the NAHB Homebuilder Cost Codes, broken into five logical phases from product definition to indirect costs
- ☐ Keep codes simple, consistent, and sortable so phases run in order

Step 2: Build a Task for Every Payment

- ☐ The book's core rule: the best schedule is built by setting up a task for every payment
- ☐ Break large trades into multiple tasks instead of one lump item. Plumbing splits into undergrounds, rough-in, and trim. Framing splits into lumber drops per floor. Roofing splits into dry-in and shingles

Step 3: Tie Every Task to Its Trade and Pay Point

- ☐ Structure tasks under a master phase (Plumbing 100, for example), with sub-phases underneath it (Undergrounds 101, Rough-In 102, Trim 103)
- ☐ Make sure your software knows who is doing the work, where, and at what rate, since trades and pricing vary by community



Step 4: Sequence Trades to Protect Cycle Time

- ☐ Get the roof on before windows where code allows. Dry-in lets plumbing, electrical, and HVAC roughs move forward
- ☐ Never start siding until windows are confirmed in hand and correct
- ☐ Order critical path items early: appliances, windows, garage doors, lighting, and trusses are the most common bottlenecks
- ☐ Sequence finish work to avoid rework: flooring and cabinets before final paint, not right after drywall

Step 5: Set Lead Time and Duration on Every Task

- ☐ Build lead time and duration into the scope of work itself, not just the schedule. It's another way to build accountability into the trade relationship

Step 6: Set Up the Schedule and Software on Purpose

- ☐ Never cut corners during setup. Most schedule "hiccups" trace back to a button not set, a trade not aligned to a phase, a typo in a cost code, or a task not tied to the right pay point
- ☐ Test with a small project before rolling out companywide

Step 7: Track Progress with One Clear Snapshot

- ☐ Keep reporting simple: is the job ahead or behind, what obstacles need removing, who is blocking the workflow
- ☐ Leadership doesn't need the weeds, it needs red flags. If the team is constantly behind, remove the obstacle instead of just reshuffling the date



Step 8: Protect the Schedule Once It's Published

- ☐ Once a date is set, don't change it without real cause. Trades notice, and it's what earns their trust
- ☐ Don't let superintendents cut corners on permits or inspections just to hit a date. It breaks trust in the entire system

Step 9: Review Cycle Time Like It's Money in the Bank

The book's own Cycle Time Action Checklist:

- ☐ Order early and confirm delivery dates for all critical path items
- ☐ Standardize materials when possible
- ☐ Use offsite construction like wall panels to control labor shortages
- ☐ Schedule trades logically to avoid gaps and rework
- ☐ Inspect all deliveries. Wrong or missing items cost more than they seem
- ☐ Walk your jobsites. Don't let days slip by idle
- ☐ Measure twice, build once. Correct it on paper, not in the field
- ☐ Stick with the plans. Changes in production only lose money and time