

The Monthly Close-to-Review Timeline in Plain English

A simple internal guide for PMs, accounting, and leadership

Why the timeline matters	What the timeline should do	Core idea
A good month-end rhythm keeps PMs, accounting, and billing aligned so the meeting focuses on decisions instead of data cleanup.	Clarify who updates what, by when, and what must be ready before the review meeting starts.	A better job review usually starts with a better close-to-review cadence.

A practical 5-step timeline

- Day 0–1: Post job cost and resolve major coding issues
- Day 2–3: PMs update cost-to-complete and change order status
- Day 4: Accounting prepares preliminary WIP and exception list
- Day 5–7: Run the Monthly Job Review meetings
- Day 8–10: Finalize WIP, financials, and carry-forward actions

Who owns what

- Accounting: close cost and prep preliminary WIP
- PMs: update forecast assumptions and job issues
- Billing/AR: update billing status, disputes, and collections blockers
- Facilitator: set job order and run the meeting

What should be ready before the meeting

- Preliminary WIP and exception list
- Updated EAC assumptions
- Current CO status
- Billing/AR issues
- Prior-month follow-ups

Where timing usually breaks down

- PM updates arrive late
- Coding issues stay unresolved
- Billing support is incomplete
- The packet is built too close to the meeting

Red flags

- The team is discovering numbers live
- WIP is still moving during the meeting
- PMs and accounting are using different assumptions
- Action items are not carried into the next cycle

Best practice

Use the same close-to-review sequence every month so the team builds muscle memory and the meeting can

Bottom line

Bottom line: The close-to-review timeline matters because the quality of the meeting usually depends on the quality and timing of the pre-work.

Best Monthly Job Review use: Keep the timeline simple, assign clear ownership, and make sure the meeting is validating the packet — not building it.