



Implementing a Better Monthly Job Review Process in 30 Days

A simple internal guide for PMs, accounting, and leadership

What the first 30 days should accomplish	What to do first	Core idea
Create a repeatable meeting rhythm, standardize the packet, assign ownership, and make actions visible.	Pick a pilot set, assign owners, start with the minimum viable packet, and run the meeting with discipline.	You do not need a perfect reporting environment. You need a process the team can actually repeat.

A practical 30-day rollout

- Week 1: Align and assign
- Week 2: Run cycle one
- Week 3: Fix input gaps
- Week 4: Run cycle two and refine

What to do first

- Pick a pilot set of jobs
- Assign owners
- Start with the minimum viable packet
- Run the meeting with discipline
- Improve after two cycles

What success looks like

- The packet is more standardized
- The meeting is more focused
- Ownership is clearer
- Actions are visible
- Leadership has more confidence in the numbers

Common mistakes to avoid

- Making the packet too large too soon
- Letting the meeting turn into discovery
- Not tracking carry-forward items
- Over-customizing by PM or job type

Why teams stall

- Waiting for perfect data
- Trying to fix everything at once
- Adding complexity too early
- No clear ownership

Best practice

Start simple. Run the process twice. Then refine which pages matter most, where inputs are weak, and which add-ons add real value.

Bottom line and best use

Bottom line: Progress usually comes from discipline, not complexity. A good 30-day rollout builds a cadence the team will actually use.

Best Monthly Job Review use: Start with the Cover Sheet, Summary Sheet, Job Cost Review, and Change Order Log, then add commitments, productivity, or cash views only after the core rhythm is working.