

WORKSHEET 1

COURSE OVERVIEW



Name: _____

Date: _____



COURSE PURPOSE

This course equips construction professionals with the knowledge and tools to create accurate, clear, and complete contract documentation that reduces risk, prevents disputes, and protects project outcomes. You will learn how strong documentation and proactive risk mitigation lead to successful projects.

WHAT YOU WILL LEARN



CONTRACT DOCUMENTATION ESSENTIALS

Understand the key documents in a construction contract and their purpose.



DOCUMENT QUALITY & CLARITY

Learn how to write, format, and manage documents that are clear, consistent, and enforceable.



RISK IDENTIFICATION & MITIGATION

Identify potential risks in contracts and project communications and apply strategies to mitigate them.



CLAIMS & DISPUTE PREVENTION

Use documentation best practices to reduce misunderstandings, claims, and costly disputes.



PROFESSIONAL IMPACT

Build confidence, credibility, and leadership skills that contribute to better project results and stronger teams.

COURSE MODULES AT A GLANCE

1

FOUNDATIONS OF CONTRACT DOCUMENTATION

Overview of key contract documents and their role in project success.

2

CREATING CLEAR, COMPLETE DOCUMENTS

Principles and techniques for writing accurate, unambiguous documentation.

3

RISK AWARENESS IN CONTRACTS

How to identify contract risks and common areas of potential exposure.

4

DOCUMENTATION THAT PROTECTS

Best practices for tracking, communicating, and storing project information.

5

CLAIMS & DISPUTE AVOIDANCE

How strong documentation supports your position and prevents disputes.

6

WORKFLOWS FOR CONSISTENT DOCUMENTATION

Step-by-step processes and tools to keep documents organized and consistent.

7

LEADING WITH DOCUMENTATION

Using documentation excellence to build trust, accountability, and project success.

KEY BENEFITS

- ✓ Reduce risk and prevent costly disputes
- ✓ Improve document accuracy and clarity
- ✓ Strengthen project records and accountability
- ✓ Increase efficiency and save time
- ✓ Build trust and credibility with stakeholders
- ✓ Lead with confidence and professionalism

REFLECTION QUESTION



What is one challenge you currently face with contract documentation or risk management that you are most excited to improve through this course?



COURSE MINDSET

Clear documentation today. Fewer risks tomorrow. Stronger projects always.

CONTRACT DOCUMENTATION & RISK MITIGATION

WORKSHEET 2

STEP-BY-STEP INSTRUCTION



Name: _____ Date: _____



HOW TO USE THIS WORKSHEET:

Follow the step-by-step instructions to learn how to apply Contract Documentation & Risk Mitigation in real construction situations. Work through each step, then complete the action checklist.

STEP-BY-STEP INSTRUCTION

STEP 1

GATHER THE CONTRACT DOCUMENTS

- Collect and organize the contract, specs, drawings, and related documents.
- Confirm you have the latest revisions.

STEP 2

REVIEW AND UNDERSTAND THE SCOPE

- Read the scope of work and key requirements.
- Identify responsibilities of all parties.
- Note critical dates and deliverables.

STEP 3

IDENTIFY POTENTIAL RISKS

- Look for missing information, unclear language, and conflicting requirements.
- Assess schedule, cost, and quality risks.
- Document risks early.

STEP 4

COMMUNICATE AND DOCUMENT

- Share questions and concerns through RFIs, emails, or meeting minutes.
- Keep a clear written record of all communications.

STEP 5

MONITOR AND TRACK

- Watch for changes, delays, and scope issues.
- Update documentation as conditions change.
- Keep stakeholders informed.

STEP 6

MITIGATE AND RESOLVE

- Address risks with clear solutions.
- Get agreements in writing.
- Confirm all changes before proceeding.

STEP 7

FINALIZE AND CLOSE OUT

- Ensure all documentation is complete.
- Verify compliance with contract terms.
- Archive records for future reference.



KEY TOOLS & DOCUMENTS

- ☐ Contract Agreement
- ☐ Project Specifications
- ☐ Construction Drawings
- ☐ RFIs (Request for Information)
- ☐ Submittals
- ☐ Meeting Minutes
- ☐ Daily Reports
- ☐ Change Orders (COs)
- ☐ Project Correspondence



TIPS FOR SUCCESS

- ✓ Be proactive – identify risks early.
- ✓ Keep communication in writing.
- ✓ Track all changes and requests.
- ✓ Know the contract requirements.
- ✓ Protect the team with clear documentation.



APPLICATION TASK

Choose one construction task from your current project (or the Thomas Investment project):

1. List the key documents you would review. _____
2. Identify at least 2 potential risks. _____
3. Write one communication you would send to address the risk. _____



NOTES

WORKSHEET 3

SUMMARY & REFLECTION

Date: _____

This course taught you how to use AI as a communication partner to create clear messages, strong documentation, and better project outcomes. You learned how to communicate with different audiences, protect your projects, and lead with clarity. The key is combining AI's power with your professional judgment and expertise.

REFLECTION QUESTIONS



1 What is one key thing you learned in this course that you will use right away?



2 How will improving your communication and documentation help your projects?



3 What are some challenges you face in communication today, and how can AI help?



4 What is one communication task you want to improve, and what will you do first?



5 How will you measure success as you start using AI in your daily work?

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MY NOTES

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

PERSONAL ACTION COMMITMENT

Write one commitment to apply what you learned in this course.

My commitment: _____

I will take this action by: _____

This will make a difference because: _____



FINAL THOUGHT

AI is a powerful tool, but you are the professional who leads the project.

Communicate clearly. Document confidently. Lead effectively.

