

INTERMEDIATE · LESSON 3 · 6 MIN READ

Documentation Best Practices

What 'paper-ready' looks like before a single lien is filed.

OVERVIEW

A defensible lien file looks the same in every industry: signed contract, invoices, delivery proof, correspondence, and a clean chain of approvals.

If you cannot produce these in five minutes, you are not lien-ready.

KEY CONCEPTS

- Signed master agreements and signed change orders
- Daily logs and delivery tickets
- Lien waivers issued and received
- Centralized correspondence record

COMMON MISTAKES

- Storing documents in personal inboxes instead of a shared file.
- Relying on memory for verbal approvals.

PRACTICAL EXAMPLES

FIVE-MINUTE TEST

If asked, can you produce the signed contract, all change orders, the last 60 days of invoices, and the last lien waiver issued — in five minutes? If not, fix the system before you need the lien.