

INITIAL CONTACT
BY PHONE/EMAIL
LOCATION
GENERAL SCOPE
BUDGET
ANTICIPATED SCHEDULE
CONTRACTOR OF RECORD
CONTACT INFO
LEAD SOURCE

FEASIBILITY
IN OFFICE
ZONING RESEARCH
ON LINE PICTURES
CREATE LEAD
CREATE FOLDER

INITIAL SITE VISIT
ON SITE
REFINE SCOPE
GATHER INITIAL SITE INFO
CEILING HEIGHTS
FLOOR PLATE THICKNESS
WALL TYPES AND THICKNESS
PICTURES OF EXTERIOR
ESTIMATED ROOF SLOPE
DISCUSS ROOM TYPES
DISCUSS LIVING STYLE
DISCUSS HOUSE STYLE
POTENTIAL PLAYERS:
SURVEY, STRUCTURE, SOIL...

JOB SETUP
IN OFFICE
SEND PROPOSAL
UPON ACCEPTANCE:
BUILD CONTRACT
SEND CONTRACT & **INITIAL INVOICE**
UPON RECEIPT OF:
SIGNATURE AND PAYMENT
SCHEDULE MEASURE

MEASURE TEAM
ON SITE
MEASURE AND RECORD
EXISTING CONDITIONS

CONCEPT DEVELOPMENT
IN OFFICE
CREATE CONCEPT FROM
SCOPE

QUALITY REVIEW
CLIENT REVIEW
IN PERSON OR ZOOM

REDLINE CORRECTIONS
4X (MAX)
CHANGE ORDER?

QUALITY REVIEW
CLIENT REVIEW
IN PERSON OR ZOOM

DESIGN PHASE
CONSTRUCTION DOCUMENTS
IN OFFICE
ENGINEERING COORDINATION
MUNI/COUNTY SUBMITTAL REVIEW
ADD NOTES
CALCULATIONS
TABLES
LEGENDS
SCHEDULES
ENGINEERING CHANGES
FINAL CLIENT REVIEW
FINAL INVOICE
READY FOR PERMIT SUBMISSION

SECOND INVOICE

