

**PLAN & ORGANIZE**

- Interview Client/Stakeholders and Document Project Goals, Preferences, and Requirements.
- Determine Project Scope and Design Services Needed
- Measure and Photograph Project Areas in Design Scope
- Obtain any existing architectural drawings that exist from the Architect or Builder for review<sup>1</sup>
- Perform Preliminary Research of any special considerations or codes.
- Generate Design Objectives and provide Proposal to Client for Design Services

**CONCEPT & DESIGN**

- Draft Existing (or “as-built”) Plan Set<sup>2</sup> to use as basis for Design work
- Study and understand space and requirements.
- Prepare design concepts including diagrams, sketches and moodboards
- Generate plan layout options and 3D models to communicate vision.
- Identify any Contractors, 3rd Parties, Fabricators, and Installers needed.
- Define FFE selections needed for project and begin preliminary research
- Present Concepts to Client for Refinement and Sign-Off to set forth Design Direction

**DEVELOP & DOCUMENT**

- Refine Layouts & Generate Plans, Elevations, and Details of Key Areas
- Present Design Plan Details to Client for Approval
- Supply Drawing Sets to Contractor, Fabricators, Installers and/or Specialty Trades for Estimating
- Create Final Detailed Drawing Sets for Construction, Purchasing and Fabrication
- Supply Contractor and Fabricators with Final Plan Sets

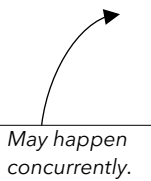
**SOURCE & PURCHASE**

- Research FFE/Product Selections and Develop Budgets
- Source Selections & Request Samples, Cost Estimates and Vendor Quotes
- Finalize selections and get approvals from Client
- Prepare Purchase Order Documentation
- Place orders for FFE purchases and record anticipated delivery details.
- Determine any warehousing/storage needs and receiving process.
- Generate FFE Schedules and Timelines for Deliveries and Installations
- Provide Specification Documents to Contractor

**MANAGE & FINALIZE**

- Coordinate with Architect, Building Manager, and/or Contractor as needed.
- Track FFE orders and deliveries.
- Conduct periodic site visits to review job progress and for quality control.
- Meet regularly with Client and Contractor for status updates and walkthroughs
- Supervise any key installations
- Troubleshoot Issues that may arise
- Assist with Punch List
- Project “Offboarding” including Photography

May happen concurrently.



<sup>1</sup> If plans are provided to Designer from an Architect or Builder, these may require a review and critique prior to any design work commencing. If there are recommended changes or revisions, there may be some additional steps needed in process planning.

<sup>2</sup> CAD plan sets can be obtained from architect if available however should be reviewed in conjunction with site visit details.

## PROJECT DELIVERABLE EXAMPLES

- Programming Diagrams (Adjacency, Blocking, Bubble)
- Checklists & Guides
- Design Boards (a.k.a. Moodboards or Concept Boards)
- Floor Plans
- Elevations, Sections, and Details
- 3D and Perspective Views
- Rendered 3D Views
- FFE Option Lists and Documentation
- Millwork/Cabinet Plans and Details
- Reflected Ceiling Plan
- Lighting Plan
- Switching /Outlet Plan
- Other Specialty Plans - Furniture, Surfaces/Finishes, Flooring
- FFE Specification Schedules
- Keyed FFE Plans
- Purchasing Documentation and Order Support
- Contractor Scope of Work
- Budget Estimates