

## MODULE 12 WORKSHEET

# THE DESIGN PROCESS

### **Process Checklist**

- ☐ Have you completed your design flow chart?
- ☐ Do you have forms for each step in the process that requires them? For example, spec lists for contractors/subs.
- ☐ Do you have client questionnaires prepared for initial consult and presentation?
- ☐ Do you have a screener? Or at least a screening questionnaire?
- ☐ Do you have your process in place for the initial consult?
- ☐ Are all fees/conditions spelled out for the fee proposal? Do you have a SOLID contract that covers all issues and protects your business?
- ☐ Does the client clearly understand your procurement process and fees/markups?
- ☐ Have you given your client a clear timeline of the project?
- ☐ When and how will the client provide you with inspiration items such as pinboards?
- ☐ Have you taken care of details like gate codes, keys, meeting subs, introducing your team, schedule for measurements, etc.?
- ☐ Do you have your process in place for the design presentation?
- ☐ Do you provide revisions? When and how?
- ☐ Do you provide the contractor and/or subs with a spec binder? When and how will it be updated? And by whom?
- ☐ What is your procurement process? How do you handle re-pricing or revisions?
- ☐ Do you have clients approve and sign every single product selection?
- ☐ What checklists do you have in place for subs, your team, builders, etc.?
- ☐ Do you have a process in place to consistently communicate with your client?
- ☐ What is your process for installation? Do your team members, the movers, and all subs understand how you expect them to dress and behave?
- ☐ Do you have a process in place for the punch list and follow up?