

## **Step 1 - Consultation With Traci Herbert**

We meet with you in your home for a collaborative client and designer interview. In doing so, we are mutually discovering if your project is the right fit for each other. We provide you with design advice and recommendations, and a great direction for your project. We also discuss details such as your goals for the space, your design aesthetic, how you will be using the space, what inspires you, your time-frame for completion, and your budget. We also review the terms of our Letter of Agreement which you will sign later.

## **Step 2 - Fee Proposal Outlining Project Scope and Estimated Design Fees**

We outline the scope of work for the entire project, our design intent and goals, the estimated design fee, the advance on our design fee required to get started, the estimated timeline, and the terms and conditions. The Fee Proposal is approved and initial advance on our design fee received to signal the start of the project. Please note that the Fee Proposal is not the same as the Design Plan or Design Presentation. The Fee Proposal needs to be approved and fee advance received before we begin your Design Plan and Presentation.

## **Step 3 - Site Measure And Planning Day**

This is where we invite the contractor that will be involved in the process for a site visit to discuss the project scope and to take measurements and photos. They will provide a written estimate outlining their scope of work and the cost for labor and/or materials within 1-2 weeks. These estimates will be presented to you in the Final Presentation Meeting.

## **Step 4 - Concept Development, Sourcing, Researching, Quotes + Estimates**

This is where we take the time to plan your project. We start with a design concept which is further developed through renderings, elevations, and color schemes. We also source all materials, fixtures and furnishings. During this step we work closely with our trades people who provide us with estimates and quotes for their scope of work. An initial budget is also developed during this step.

## **Step 5 - Presentation, Budget, Revision (If Any) & Follow Up Presentation**

This is where we meet with you to go over the details of your custom design plan. This includes all drawings, color scheme, mood board, plumbing fixtures, lighting selections and budget breakdown including estimated costs for any work by our trades and artisans. One revision is included and must be requested at this meeting. This is when the Letter of Agreement is signed and the balance of our design fee, plus 10% of the construction budget may be required. In some cases, 100% of the budget is required depending on the type of project and short timeline.

A follow up Presentation Meeting, also known as the (Final Presentation Meeting) is sometimes needed if revisions were requested. This involves all the approved elements from the original Design Presentation, plus any new elements that were agreed upon and any revisions requested. Because we believe in a collaboration between client and designer, as well as our trades and artisans, this presentation will address all of your wants and needs for your project, based on previous meetings and discussions. The Final Presentation includes working drawings, color scheme, all products, and detailed budget breakdown - item by item. It will all be laid out for you so that you will be able to visualize what the finished space will look like. Any adjustments to the budget due to revisions are agreed upon at this meeting.

## **Step 6 - Initiation Of Construction/Procurement & Project Management (4-12 weeks depending on size and scope of project)**

This step is where we initiate our agreed upon role in any construction or renovation included in your project. This usually means that we are collaborating with builders, vendors, and fabricators and making the necessary site visits to ensure a successful process and completion.

In this step we also create all purchase orders, track orders, assess lead times, note any back-orders or discontinued items that may delay the project, and make decisions whether or not to re-select. During this time, we make sure that our projected timeline is adhered to by all vendors. Progress payments will be discussed by the contractor when construction milestones are achieved.

## **Step 8 - Pre-Construction Meeting / Receipt of Orders**

This is where all items that were ordered are received and delivered to your home, inspected for damages, tagged and stored for the installation process. Claims and reorders are made for any items that arrive damaged. We prefer to begin demo/install once all items are received to ensure no delays in your project. Some

custom items like like countertops will be measured, verified and installed at the appropriate step in the installation phase. Any additional payments for these items will be required at this time.

### **Step 9 - Punch List / Final Walk Through**

This is the part of the project that any touch ups required will be handled by the contractors and installers, such as cabinets, paint. The walk-through may happen on the same day of the reveal or on a separate day. Although we strive for perfection, mistakes can happen. The final walk through is where the client gets a chance to point out any deficiencies observed - Items like a small splash of paint on the floor, missing cabinet pulls, plumbing adjustments, etc. Items that could have easily been missed during the original install process.

This is also the exciting moment when we walk through the finished space and point out all the features and benefits of each item, discuss how to care for each piece and any warranties available (if any). If there are any outstanding invoices from delivery companies, cleaning service, etc they will be presented at that time and final payment will be required.

### **Step 10 - Resolving Deficiencies**

We coordinate with the trade person, subcontractor, or vendor involved to cure any deficiencies within 14 business days. Thankfully, this step is not needed in most cases, but we make sure that you will be happy with your finished space

### **Step 11 - Client Closure Meeting & Photography**

This is where we meet to close out the file for the project and make sure that you are fully satisfied with your new space.

We will also graciously ask for any feedback, reviews and referrals, and discuss any additional projects you would like to move forward with.

We will also discuss a convenient day for us to schedule a professional photographer to shoot pictures of the project. If we intend to have these pictures published on our company website and social media outlets, we will discuss that with you and determine if you want your name disclosed or not.