

Project Plan
Schedule and Timeline



Item	Task Description	Duration
1	Send prospect Planning & Design Services overview	
2	Send prospect Planning & Design Services agreement	
3	Receive Planning & Design Services agreement (executed) with fees; prospect becomes client	
4	Receive Planning & Design Services fees; prospect becomes client	
5	Copy of check sent to Rich; entered into system	
6	Prepare for Scope phone interview with client	
7	Schedule Scope interview with client	
8	Complete Scope interview with client	
9	Complete Summary of Interview	
10	Receive site plan, floor plans, CAD files from client	
11	Spaceez completes and delivers Scope of Work (SOW) to client and WareMalcomb (WM) via GoogleDrive	
12	Spaceez requests Mood boards from WM	
13	Draft Project Plan (timeline)	
14	Draft Budget	
15	Draft CAD	
16	WM produces Mood boards; delivered to Spaceez	
17	Schedule Mood Board review with client and WM	
18	Conduct Zoom meeting: Spaceez/client/WM - WM presents Mood Board to client	
19	Complete Zoom meeting: Spaceez/client/WM - WM asks client if want proposal	
20	WM prepares proposal	
21	WM sends proposal to Spaceez	
22	Spaceez presents and reviews proposal with client	
23	Client signs and returns proposal to Spaceez	
24	Spaceez forwards executed proposal to WM	
25	Client sends retainer fees to WM	
26	Spaceez communicates with client that formal agreement is coming	
27	WM sends formal agreement to Spaceez	
28	Spaceez forwards agreement to client	
29	Spaceez reviews project plan with client	
30	Client executes agreement with WM	
31	WM begins space plan from supplied CAD files	
32	WM begins schematic design from Spaceez/Client conversations and updated SOW	
33	Spaceez requests Design Development authorization from client	
34	WM begins Actual Design Development	
35	WM defines Design Development deliverables; e.g., furniture specifications, finishes, etc.	
36	Identifying Construction Elements	
37	Detailing Furniture (8-12 week leadtime)	
38	Order Construction Elements	
39	Review Design Development with Client & WM	
40	Develop Size, Costs & Timing	
41	Test Fit Final Selection	
42	Owner/Landlord RFP Modifications	
43	Construction Estimates	
44	Architect Construction Documents	
45	Contractor Selection	
46	Pre-Construction	
47	City Permit Approval	
48	Construction	
49	Furniture - Design & Procure	
50	Technology systems - Design & Procure	
51	Voice & Data Cabling - Design & Procure	
52	Media systems - Design & Procure	
53	Signage - Design & Procure	
54	Security System - Design & Procure	
55	Final move/configuration/installation	
56	Vendor Notifications	
57	Complete Construction, Project & Move Punch List	
58	First Day of Operations	
59	Follow-up & Invoice Approvals	