

Scope of Service Chart

KEY ACTIONS	PROPOSAL TO CONTRACT	PROJECT INITIATION	SCHEMATIC DESIGN DEVELOPMENT
<p>Project Coordination</p>	<ul style="list-style-type: none"> ◦ Review marketing information ◦ Review scope ◦ Identify deliverables ◦ Identify client deliverables ◦ Develop task plan ◦ Identify % profit ◦ Review w/ marketing ◦ Review w/ design 	<ul style="list-style-type: none"> ◦ Conduct team kick-off meeting ◦ Establish client communication ◦ Develop client “directory” ◦ Team meeting, post-client meeting ◦ Team meeting, summary report/ review program ◦ Issue report/program to client for approval 	<ul style="list-style-type: none"> ◦ Conduct team kick-off meeting ◦ Maintain client communication ◦ Conduct in-house presentation, 2 days prior to client meeting ◦ Issue meeting minutes
<p>Contract</p>	<ul style="list-style-type: none"> ◦ Finalize scope of work ◦ Establish fee payment schedule ◦ Finalize contract ◦ Schedule contract presentation ◦ Obtain client authorization ◦ Obtain initial payment 	<ul style="list-style-type: none"> ◦ Scope review ◦ Review deliverables ◦ Review client deliverables 	<ul style="list-style-type: none"> ◦ Monitor work against contract ◦ Monitor need for additional services ◦ Obtain client deliverables
<p>Fee Monitoring</p>	<ul style="list-style-type: none"> ◦ Confirm fee to work scope 	<ul style="list-style-type: none"> ◦ Review fee & project work against budget ◦ Review task plan ◦ Review profitability goals ◦ Monitor 	<ul style="list-style-type: none"> ◦ Monitor profitability

**DESIGN
DEVELOPMENT**

- Conduct team kick-off meeting
- Maintain client communication
- Conduct in-house presentation, 2 days prior to client meeting
- Issue meeting minutes

DOCUMENTATION

- Conduct team turn-over meeting
- Maintain client communication
- Conduct in-house document-review meeting(s)
- Conduct client-review meeting
- Obtain client approval
- Issue meeting minutes

BIDS

- Prepare list of qualified bidders; review w/ client & obtain approval
- Stamp appropriate documents
- Issue documents for bid
- Receive & review bids
- Prepare bid summary & recommendations
- Review bids w/ client
- Obtain bid authorization

SITE MONITORING

- Conduct kick-off job-site meeting w/ all contractors/ vendors
- Attend job-site review meeting
- Issue field reports, field conditions, change orders, punch lists to appropriate parties
- Conduct client walk-throughs
- Conduct team walk-through for "lessons learned" evaluation

PROJECT CLOSEOUT

- Conduct project close-out meeting
- Distribute close-out reports to: marketing coordinator, senior vice president, project manager, finance manager
- Close out all project files
- Distribute materials to marketing as required

- Monitor work against contract
- Monitor need for additional services
- Obtain client deliverables

- Monitor work against contract
- Monitor need for additional services
- Obtain client deliverables

- Issue authorized bids to successful bidders
- Monitor work against contract
- Monitor need for additional services
- Obtain any client deliverables

- Monitor work against contract
- Monitor need for additional services
- Obtain any client deliverables

- Obtain copy of final contract
- Obtain copy of all additional services

- Monitor profitability

- Monitor profitability

- Monitor profitability

- Monitor profitability

- Obtain copy of final project progress reports