

01. Summary Sheet

Project Planning Pack For The Research Phase

"If I had six hours to chop down a tree, I'd spend the first 4 sharpening the axe" - Abraham Lincoln

The #1 Project Problem

#1 Problem: Projects going over time and over budget.

On a daily basis, we see people moving projects into the design phase **before** the research is started. This is like a doctor starting surgery

without a thorough diagnosis or trying to build a house on a bad foundation.

That is why we created the **Rapid Project Panning Pack**. Now, you have a simple process to help you move through the Research Phase.

If you follow this tool, you will reduce project risk and improve project design.

01. RP3 Summary Sheet

Once you have ticked all the boxes below, you are ready to move to the **Analysis Phase**

02. Building Project Roadmap

Review the roadmap and identify where you are on your journey

03. Building Experts Directory

Directory of professionals who can help you at each stage of your design and building process

04. Building Cost Estimator

Simple do-it-yourself worksheet to estimate your building project

05. FAQs & SAQs

Frequently-asked questions and should-ask questions you need to know about working with an architect

06. Myth & Reality

Some things architects do outside design to complete a project

07. How To Create A Design Brief Using Only 7 Questions

Contact your shortlisted architects to start your process

08. Readiness Slider

Gauge of how ready you are to move to the **Design Phase**

02. Building Project Roadmap

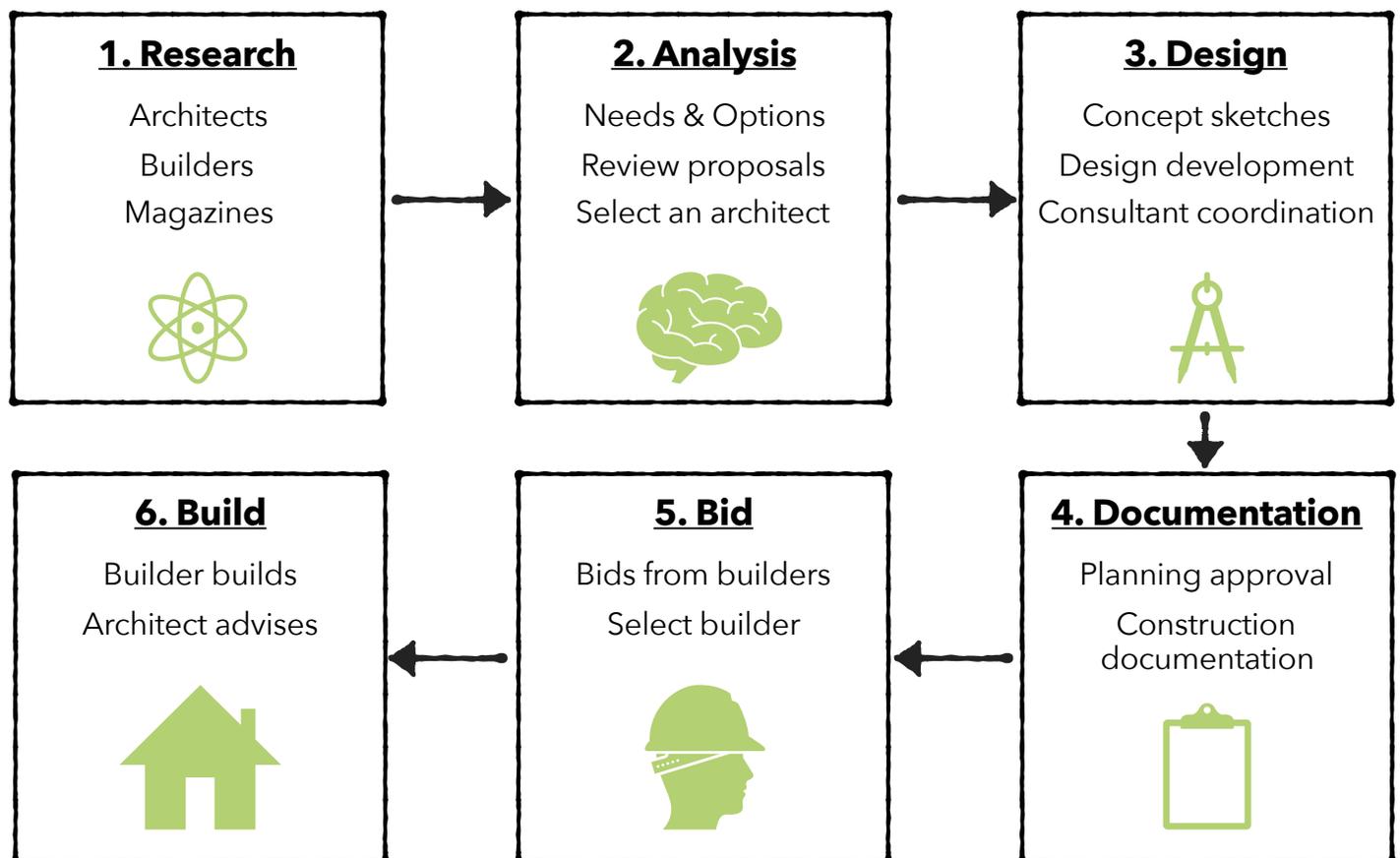
Major Steps Required For Designing and Building Your New Home

The Roadmap

This is important ... please read carefully.

Right now, you should be in the **Research Phase**. This is where you are gathering information and playing around with ideas. At the point you want to get serious, you will want to check the feasibility of your ideas and

understand what the project constraints are. If you work with me, we will move to the **Analysis Phase** by conducting a Needs and Options Review to eliminate assumptions, identify constraints and find your best options. You will receive a document that can be used by me or any other architect that will ensure you reduce project risk and get the best options for your site and budget.



When you are ready to review the feasibility of your project, email or call us >>

(123) 456-7890
richard@petriearchitects.com
www.petriearchitects.com

03. My Project Expert Directory

Our Personal Directory of Trusted Professionals

"It's not WHAT you know. It's WHO you know."

Who Are These Experts?

Understanding WHAT to do is one obstacle and working out WHO can help you is another.

On a daily basis, our team receives requests for us to recommend design professionals. To make this process easier, I have listed the design professionals that we trust for specific types of

projects. Not only do they do a great job, but they provide excellent advice, as well. These are the experts we trust explicitly.

If you have other questions about your project, don't hesitate to reach out to me. If I can't answer your question, then I'll direct you to someone who can.

Profession	Name	Company	Contact Details
<input type="checkbox"/> Architect	Richard Petrie (Me)	Petrie Architects International	(123) 456-7890 richard@petriearchitects.com
<input type="checkbox"/> Builder	Bob Townsend	Built Like A Brick	(123) 456-7890 bob@builtlikeabrick.com
<input type="checkbox"/> Certifier	Ruby Rose	Failsafe Certifiers	(123) 456-7890 ruby@failsafecertifiers.com
<input type="checkbox"/> Interior Designer	Jill Painter	Hills Interiors & Design	(123) 456-7890 jill@jillhillsinteriors.com
<input type="checkbox"/> Lawyer	Sue Gunner	Sue & Sue Law	(123) 456-7890 sue@suesuelaw.com
<input type="checkbox"/> Landscape Architect	Jerry Gardener	Beyond All Design	(123) 456-7890 jerry@beyondalldesign.com
<input type="checkbox"/> Surveyor	Jane Sight	Jane Sight Surveyors	(123) 456-7890 jane@janesightsurvey.com

The *right* architect will manage both the experts AND the process.

(123) 456-7890
richard@petriearchitects.com
www.petriearchitects.com

04. Building Cost Estimator

The Simple, Do-It-Yourself Way To Estimate Your Number

The #1 Question ...

The most dreaded question architects, builders and every other professional hates has got to be, **'how much will my project cost'?**

There are so many variables that a definitive answer is literally impossible.

Even worse, the consequences of trying to answer and risk giving 'bad advice' will have

most experts running away to avoid the question.

The problem is that this question is VERY important. No one can proceed if they don't have a ball park estimation of cost.

This guide will help you to determine an estimate of overall project costs. Your actual number may be more or less, but it can be helpful to see an estimated figure.

New Home Cost Estimator				Estimate Your Cost	
Style	Standard	Medium	Luxury	Area	Cost
Cost Per Sq Ft	USD200	USD250	USD300		
1000	USD200,000	USD250,000	USD300,000		
2000	USD400,000	USD500,000	USD600,000		
3000	USD600,000	USD750,000	USD900,000		

Renovation Cost Estimator				Estimate Your Cost	
Style	Standard	Medium	Luxury	Area	Cost
Cost Per Sq Ft	USD300	USD350	USD400		
1000	USD300,000	USD350,000	USD400,000		
1500	USD450,000	USD525,000	USD600,000		
2000	USD600,000	USD700,000	USD800,000		

For a detailed project cost assessment, email me at richard@petriearchitects.com

(123) 456-7890
richard@petriearchitects.com
www.petriearchitects.com

05. Questions To Ask

When Hiring an Architect, It's Helpful To Have A Process To Make Sure You Get The BEST Person For The Project.

Asking The Right Questions

Although extensive schooling and training are required for all architects, that doesn't mean all architects are created equal.

Finding the RIGHT architect for you depends on several factors, including: personality, design style, building for taste or to make money,

budget and even whether your project requires a specialist skill set.

Choosing the right architect can mean the difference between an enjoyable experience and one plagued with problems and hassles the whole way through once a project moves into the **Build Phase**. How will your project go?

The questions are the answer ...

A great architect is your Designer, Advocate, Teacher, Project Leader and Coordinator

- | | |
|--|--|
| <input type="checkbox"/> What unique value do you have for our specific type of project? | <input type="checkbox"/> How would you like me to share my ideas, images, needs, wants and research? |
| <input type="checkbox"/> How can you add value to our home so that we maximize the return on investment when/if we sell? | <input type="checkbox"/> What can I do to help you deliver the best work for us? |
| <input type="checkbox"/> Do you offer a pre-design analysis service to help move us safely and efficiently towards the design phase? | <input type="checkbox"/> Do you have a team game plan that outlines how we will all successfully work together, even under pressure? |
| <input type="checkbox"/> What are the specific challenges for our type of project and how have you overcome these in the past? | <input type="checkbox"/> Will you run the tender process to find and select the best construction team? |
| <input type="checkbox"/> If my budget, timeline and scope of project are unrealistic, will you let me know? | <input type="checkbox"/> What educational material do you provide so we can understand the requirements of our specific type of project? |

Hiring the RIGHT architect is the single most important decision to make on your project.

(123) 456-7890
richard@petriearchitects.com
www.petriearchitects.com

06. Myth vs. Reality

What Do Architects Actually Do?

An architect's role is a lot larger than most people realize. When an architect manages your project, they ensure that every part of the

process below (and more) is handled to ensure that the biggest investment in your life or career is safe and secure.

Myth

Sketches design that a builder uses.

Reality

Checking the title and, in particular, any easements and land covenants that may restrict what or where you can build.

Ensuring Compliance with building and safety regulations, local planning regulations and restrictions. Depending on the project, there may be laws surrounding the preservation of the local environment or any historic parts of a building.

Leadership - heading up the team of professionals who will work on this stage of the project including builders, tradespeople, engineers, designers and financial professionals.

Construction documentation - translates the design into instructions and technical specifications for contractors and construction experts. Ensures those specifications are met.

Project management - site visits and meetings, overseeing the construction and validating quality of work, negotiating with contractors and dealing with and resolving any problems that arise.

In summary, the architect is the conductor of the project orchestra.

(123) 456-7890
richard@petriearchitects.com
www.petriearchitects.com

07. How To Create A Design Brief Using Only 7 Questions

"Focusing is About Saying No." - Steve Jobs

Alice: "Would you tell me, please, which way I ought to go from here?"

The Cheshire Cat: "That depends a good deal on where you want to go."

Alice: "I don't much care where."

The Cheshire Cat: "Then it doesn't much matter which way you go."

The method below is our famous 7 Question design brief creator. You can request a more detailed, but equally simple, guide by visiting www.designmyspace.com.

Your Question	Answer
1 Outline your current situation?	
2 How do you live? Is that changing or about to change?	
3 What will you need to see to know your project has been a dramatic success?	
4 How do you want to FEEL as you move through your new space?	
5 Who are the important people this home needs to be designed for?	
6 What are the budget, timeframes and boundaries we need to work within?	
7 What does your home really mean to you?	

To download our full design brief guide, visit www.designmyspace.com

(123) 456-7890
richard@petriearchitects.com
www.petriearchitects.com

08. Readiness Slider

Are You Ready To Move To The Design Phase?

Do You Need An Architect?

This exercise allows you to assess how ready you are to move to the **Design Phase**. If you are not close to 10 on ALL scales, then it's best to seek help from an expert to do this research.

If you rush into the design phase without this information available, you'll run the risk of making too many assumptions, which is the # 1 reason projects go over budget and over time.

"Measure twice, cut once," Builders Mantra

Question

Slider

(0-10, zero = low, 10 = high)

On a 1-10 scale, how clear are you on exactly what you need?

0 _____ 10

On a 1-10 scale, how aware are you of all the various options your site will accommodate?

0 _____ 10

On a 1-10 scale, how confident are you that you are aware of all the legal requirements?

0 _____ 10

On a 1-10 scale, how aware are you of the process you will need to have in place to get the project completed on time and on budget?

0 _____ 10

On a 1-10 scale, how confident are you that you that your budget will achieve your needs?

0 _____ 10

Give yourself a current overall rating for readiness.

0 _____ 10

Don't worry if you are not at 10 on all scales yet. The Needs and Options Review process allows you to fill in the knowledge gaps and gets you ready to move to the **Design Phase**.

Our Needs and Options Review is the process designed to get you to 10 on ALL sliders above.

(123) 456-7890
richard@petriearchitects.com
www.petriearchitects.com