

Phase →  
Stream ↓

	Pursuit & Contracting	Initiation & Planning Setup · Plan · Kickoff	Design & Coordination	Construction Admin	Closeout & Growth
Client Experience CONFIDENCE	<p><b>The client's success criteria, drivers &amp; decision-makers are documented as measurable success factors.</b></p> <p>Runs discovery beyond scope &amp; fee; names the decision-maker &amp; approval path; tailors the proposal.</p>	<p><b>Deliverables, schedule &amp; the communication and decision process are confirmed with the client.</b></p> <p>Holds the external kickoff; opens a living risk register with the client.</p>	<p><b>Owner approvals &amp; scope changes stay timely, documented &amp; tied to the agreed goals; phase gates hold.</b></p> <p>Secures Owner approval at each gate; prices changes via the change log; holds the gates.</p>	<p><b>Approvals &amp; changes stay timely; construction issues are surfaced with options before they become surprises.</b></p> <p>Authorizes additional services via the change log; issues AIA instruments.</p>	<p><b>The client feels well served, gives strong feedback &amp; is open to future work.</b></p> <p>Captures final feedback as relationship health (NPS); names future opportunities.</p>
Team Leadership PEOPLE	<p><b>Delivery leadership, risk posture &amp; the consultant team are aligned before committing.</b></p> <p>Engages delivery leadership early; screens risk; lines up consultants pre-proposal.</p>	<p><b>The team knows its roles &amp; work plan — and the BIM environment is ready — before design begins.</b></p> <p>Runs the internal kickoff from a written work plan; stands up the BIM environment.</p>	<p><b>Cross-discipline coordination holds &amp; quality is built in — every phase gate clears QC.</b></p> <p>Runs coordination (Master Drawing Roadmap); independent QC peer review; archives in Bluebeam.</p>	<p><b>The team keeps cadence &amp; quality holds through construction administration.</b></p> <p>Turns RFIs &amp; submittals on time; runs the bid process; stops work that bypasses review.</p>	<p><b>Lessons are captured &amp; the project record — as-builts, O&amp;M, A3 — is complete.</b></p> <p>Completes lessons learned; finalizes the Project A3 &amp; post-occupancy review.</p>
Business Management RESULT	<p><b>The pursuit clears a logged Go/No-Go, &amp; fee, risk &amp; complexity are intentionally accepted.</b></p> <p>Runs the Go/No-Go; builds the fee from the Budgeting Spreadsheet; executes the contract.</p>	<p><b>Budget, schedule, staffing &amp; fee are locked, visible &amp; under contract.</b></p> <p>Sets baseline budget, phasing &amp; staffing in BST11; executes &amp; files contracts.</p>	<p><b>Variances are caught early &amp; corrected in-phase; financial health is protected.</b></p> <p>Reviews variance each accounting cycle; completes the BST11 pre-bill review; estimates carry contingency.</p>	<p><b>Variances are corrected in-phase; financial health is monitored &amp; protected.</b></p> <p>Runs the pay-app review &amp; BST11 pre-bill review; reviews profitability.</p>	<p><b>Cash is collected &amp; the project is formally &amp; cleanly closed.</b></p> <p>Completes financial closeout &amp; resolves AR; archives &amp; requests the close-out zip.</p>