

Phase → Layer ↓	Pursuit & Contracting	Initiation & Planning	Design & Coordination	Construction Admin	Closeout & Growth
Leadership Outcomes WHAT GOOD LOOKS LIKE	<p>Client Success criteria, drivers & decision-makers documented as measurable success factors. Runs discovery beyond scope & fee; names the decision-maker & approval path; tailors the proposal.</p> <p>Team Delivery leadership, risk posture & the consultant team aligned before committing. Engages delivery leadership early; screens risk; lines up consultants pre-proposal.</p> <p>Business Pursuit clears a logged Go/No-Go; fee, risk & complexity intentionally accepted. Runs the Go/No-Go; builds the fee from the Budgeting Spreadsheet; executes the contract.</p>	<p>Client Deliverables, schedule & the communication and decision process confirmed with the client. Holds the external kickoff; opens a living risk register with the client.</p> <p>Team Team knows its roles & work plan — BIM environment ready — before design begins. Runs the internal kickoff from a written work plan; stands up BIM.</p> <p>Business Budget, schedule, staffing & fee locked, visible & under contract. Sets baseline budget, phasing & staffing in BST11; executes & files contracts.</p>	<p>Client Owner approvals & scope changes timely & documented; phase gates hold. Secures Owner approval at each gate; prices changes via the change log; holds gates.</p> <p>Team Coordination holds & quality is built in — every gate clears QC. Runs coordination (Master Drawing Roadmap); independent QC peer review; archives in Bluebeam.</p> <p>Business Variances caught early & corrected in-phase; financial health protected. Reviews variance each accounting cycle; completes the BST11 pre-bill review; estimates carry contingency.</p>	<p>Client Approvals & changes stay timely; issues surfaced with options before surprises. Authorizes additional services via the change log; issues AIA instruments.</p> <p>Team Team keeps cadence & quality holds through CA. Turns RFIs & submittals on time; runs the bid process; stops work that bypasses review.</p> <p>Business Variances corrected in-phase; financial health monitored & protected. Runs the pay-app review & BST11 pre-bill review; reviews profitability.</p>	<p>Client Client feels well served, gives strong feedback & is open to future work. Captures final feedback as relationship health (NPS); names future opportunities.</p> <p>Team Lessons captured & the project record (as-builts, O&M, A3) complete. Completes lessons learned; finalizes the A3 & post-occupancy review.</p> <p>Business Cash collected & the project formally & cleanly closed. Completes financial closeout & resolves AR; archives & requests the close-out zip.</p>
PM Responsibilities WHAT THE PM OWNS	<p>Client</p> <ul style="list-style-type: none"> Client success criteria defined Decision-makers identified Expectations documented Sample contract reviewed in Go/No-Go <p>Team</p> <ul style="list-style-type: none"> Delivery leadership engaged Risk posture aligned Consultant proposals requested Revit model started <p>Business</p> <ul style="list-style-type: none"> Fee estimate completed Proposal submitted Contract executed Go/No-Go completed & logged Project number opened (project not under contract) Pursuit logged in CRM Fee & schedule composed 	<p>Client</p> <ul style="list-style-type: none"> Kickoff completed with client Communication cadence established Project risks communicated External kickoff held Preliminary concept defined <p>Team</p> <ul style="list-style-type: none"> Project team assigned Roles & responsibilities communicated Internal kickoff completed Project Storyteller named; A3 initiated BIM environment (Forma / ACC) set up <p>Business</p> <ul style="list-style-type: none"> Project budget established Schedule approved Project set up in BST — budget, phasing & staffing Contracts executed & filed to 01_Contracts Project workspace created in Centerline 	<p>Client</p> <ul style="list-style-type: none"> Design direction approved Milestone approvals obtained Client concerns addressed Program & guiding principles defined Scope reviewed vs. contract <p>Team</p> <ul style="list-style-type: none"> Consultants aligned Coordination process established Technical reviews completed BIM Execution Plan & kickoff Specs developed; code analysis Drawings & specs published QC peer review; Bluebeam archived Staffing reviewed; A3 updated <p>Business</p> <ul style="list-style-type: none"> Forecast completed Budget & schedule variance reviewed Percent complete updated Variance reviewed each accounting cycle Phase cost estimates (SD / DD / CD) Phase archived 	<p>Client</p> <ul style="list-style-type: none"> Scope changes managed with client Additional services authorized Construction issues communicated Contractor recommendation issued Pre-construction meeting; Notice to Proceed AIA instruments issued — ASI, CO, CCD, Substantial Completion <p>Team</p> <ul style="list-style-type: none"> Construction support assigned Resources adjusted to workload Quality reviews completed Bid process run — Bid Mgmt, Pre-Bid, addenda, tabulation RFIs & submittals processed Field reports filed Construction Management set up in Centerline <p>Business</p> <ul style="list-style-type: none"> Additional services logged Invoices submitted Profitability reviewed Owner/Contractor agreement executed Contractor pay applications reviewed Metrics & pre-bill review completed 	<p>Client</p> <ul style="list-style-type: none"> Final client feedback obtained Completion confirmed Future opportunities identified Punchlist created & completed <p>Team</p> <ul style="list-style-type: none"> Lessons learned completed Knowledge transferred to team Project A3 finalized for marketing <p>Business</p> <ul style="list-style-type: none"> Financial closeout completed AR resolved Project records archived Project emails stored in Centerline Archive zip requested