

Phase → Stream ↓	Pursuit & Contracting	Initiation & Planning	Design & Coordination	Construction Admin	Closeout & Growth
Client Experience CONFIDENCE	<ul style="list-style-type: none"> Client success criteria defined Decision-makers identified Expectations documented Sample contract reviewed in Go/No-Go 	<ul style="list-style-type: none"> Kickoff completed with client Communication cadence established Project risks communicated External kickoff held — deliverables, schedule & milestones confirmed Preliminary concept defined 	<ul style="list-style-type: none"> Design direction approved Milestone approvals obtained Client concerns addressed Program & guiding principles defined with client Scope reviewed vs. contract; amendments requested as needed 	<ul style="list-style-type: none"> Scope changes managed with client Additional services authorized Construction issues communicated Contractor recommendation issued to client Pre-construction meeting held; Notice to Proceed issued AIA instruments issued — ASI, CO, CCD, Substantial Completion 	<ul style="list-style-type: none"> Final client feedback obtained Completion confirmed Future opportunities identified Punchlist created & completed in Centerline
Team Leadership PEOPLE	<ul style="list-style-type: none"> Delivery leadership engaged Risk posture aligned Consultant proposals requested Revit model started 	<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 & users added 	<ul style="list-style-type: none"> Consultants aligned Coordination process established Technical reviews completed BIM Execution Plan established & kickoff held Specifications developed; code analysis completed Drawings & specs published QC peer review vs. deliverables; Bluebeam archived Staffing reviewed each phase in BST; A3 updated; consultants added to Centerline 	<ul style="list-style-type: none"> Construction support assigned Resources adjusted to workload Quality reviews completed Bid process run — Bid Management, Pre-Bid Conference, addenda, tabulation RFIs & submittals processed Field reports filed Construction Management set up in Centerline 	<ul style="list-style-type: none"> Lessons learned completed Knowledge transferred to team Project A3 finalized for future marketing
Business Management RESULT	<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); time charged to the correct phase Pursuit logged in CRM Fee & schedule composed (Budgeting Spreadsheet) 	<ul style="list-style-type: none"> Project budget established Schedule approved Project set up in BST — budget, phasing & staffing Staffing schedule submitted Client & consultant contracts executed and filed to 01_Contracts Project workspace created in Centerline 	<ul style="list-style-type: none"> Forecast completed Budget & schedule variance reviewed Percent complete updated Variance reviewed each accounting cycle — burn, hours, billings Phase cost estimates provided (SD / DD / CD) Phase archived at completion 	<ul style="list-style-type: none"> Additional services logged Invoices submitted Profitability reviewed Owner/Contractor agreement requested & executed Contractor pay applications reviewed Metrics & pre-bill review completed 	<ul style="list-style-type: none"> Financial closeout completed AR resolved Project records archived Project emails stored in Centerline Centerline archive zip requested (project archived)