



NEEDS AND OPTIONS REVIEW

The Problem:

It is not uncommon for people to know they want to do a building project, and have thought about it quite a bit - but just don't know how best to start...

Or worse, launch into an expensive design service without establishing a relationship or worse still, not carefully establishing the groundwork for the project.

The Promise:

“A surgeon wouldn't operate without a proper diagnosis, so...”

The initial **NEEDS AND OPTIONS REVIEW** works the same way. It will allow you to start an exploration designed to precisely understand your requirements and potential roadblocks, then gives:

- Findings and Recommendations
- A Plan to Move Forward
- A Timeline and Rough Order of Cost

The Process:

We developed this process while doing our medical projects. These typically involve complex problems and solutions. We saw an issue in these projects, of people starting design and constructions BEFORE they had fully done their research and homework. BEFORE they had critiqued their ideas.

We think this applies across the construction industry - it also happens in residential projects too...

The consequence of inadequate up front research of needs and options is like ... building a house on a bad foundation.

The foundation is the most important part of the whole house, because everything is built on top. It's very expensive to change the foundation once you have started to build upwards. But it's very easy to change them if they are simply lines on a plan.

So.... we spend a little more time on the research than most other firms who rush their clients into the design phase.

There are five important steps in building:

1. Needs and Options Review - this is the first step
2. Concept Design Phase
3. Building Documentation Phase
4. Bidding and Negotiation Phase
5. Construction Phase

On the next page we've outline the **first step** - what the Needs and Options Review is.



Choosing an architect isn't easy.

You need the right architect who has the specific skill for your project. The right "fit" between you and your architect is key.

... this may or not be me!

In our experience the best way to find out whether we are the right "fit" is to fully understand what you are looking for. This is achieved through an initial consultation and our Needs and Options Review.

If for some reason we then discover that we are not an ideal "fit" then you are free to take the review report to another architect for them to continue the process.



- Greg Croft
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NEEDS AND OPTIONS REVIEW

When considering any architecture project the high-level **Needs and Options Review** with Greg Croft at Sage Leaf Group is the first step. Why...?

- Obtain a registered architects opinion on the feasibility of the project - one who is experienced in the type of project you're facing.
- Produce an outline that provides the "DNA" for future work - detailing rooms, connections, orientation, etc...
- Discuss potential solutions at a high-level that encourages on-going testing of ideas - "Design Thinking"
- Discuss the "look and feel" of a potential scheme
- Discuss the functional viability of the project and your ideas
- Provide preliminary rough order of cost estimate of construction for budget usage.
- Provide a preliminary program or timeline
- Production of report including the above
- All travel prices included in price for Idaho Falls region (other areas beyond this area are priced at "cost")
- Report includes schedule of services and fee proposal on next stages of project.

A surgeon wouldn't operate without a proper diagnosis... our initial **Needs and Options Review** works in the same way.

It starts a strategy designed to precisely understand your requirements, and then give findings and recommendations, and a plan to move forward with a timeline and rough order of cost to assist your budget.

What do you get?

Phase I: Initial Scoping Discussion - An outline brief for your project (\$600.00)*.

Meet on-site and discuss the project

Clarify issues; discuss options and current thinking

Clarify project aims and vision

You provide: existing site and background information

Phase II: Options Sketches - Options development and analysis (\$600.00)*.

Explore potential spatial relationships, connections and future-proofing options

Prepare freehand concept options

Prepare and present report

Yes, I would like to book an initial discussion with Greg Croft as described above.

Yes, I have completed the agreement (next page) and provided my information to get the project underway. *Total \$1,200.00



We request that you sign the agreement in the space provided below, copy it for your own records and return a signed copy to us for our records.

CLIENT ACCEPTANCE AND CONFIRMATION OF DETAILS

Name _____

Title _____

Billing Address _____

E-mail Address _____

Signature _____ Date _____

Please scan and e-mail to:
greg@sageleafgroup.com