Instructions;

We would like you to do a self-evaluation of your skill sets. We identified and listed a range of professional skills from the design industry. In your business you may perform all, some or none of the tasks listed for your projects. For this exercise we would like you to complete the assessment as if you are a full service "Design Build" firm. Don't rush through it and don't do it at the end of the day. Complete the assessment when you are in a neutral and objective mind space (if possible).

The three categories are:

Concepts; Everything that should happen before you order product.

Execution; Everything that should happen before the hammer starts swinging.

Administration; Everything that should happen during construction and through the whole process; before, during and after.

Check the box if you are:

"I am really good at this"; I like doing this part, I am really efficient at the task and I know my stuff!

"I will do it if I have to."; I know how to do it, I might have to do some research and think it through, it might take me a little longer to complete the task.

"I don't want to do it"; I know how to do it—I just don't want to do it anymore **OR** I don't know how to do it and I just don't really have the motivation to learn how to do it. I am not interested in providing that service and would probably have to hire someone the help me out with the task.

Count the number in each column and list the totals. Then transfer those numbers to the columns on Pg. 5. - having a box of crayons for this part is really helpful. You will see by the columns and how the graphs lay-out where your "issues and opportunities" are!

During the discussion we will share with you our ideas on how to leverage those "issues and opportunities" to your benefit.

Concepts

Check the box if…

Rate your skillset:		I am really good at this.	I will do it if I have to.	I don't want to do it.
1	Research and analysis of the client's goals and requirements			
2	Programming, develop scope of work			
3	Inventory and document existing furniture, fixtures and equipment			
4	Obtain as-built plans			
5	Measure space and digitally document			
6	Block plans/square footage allocations			
7	Bubble diagrams/space planning concepts/formulate preliminary space plans			
8	Draft preliminary space plans and design solutions			
9	Project budgeting and cost estimates, FF&E (Labor?)			
10	Materials/product research			
11	Selection of colors, materials and finishes			
12	Material and color boards, models, mock-ups and prototypes			
13	Two and three dimensional design concept studies (quick sketch)			
14	Rendering (e.g., 3-D and 2-D) design concepts in a digital format			
15	Digital media presentation (i.e., graphic software)			
16	Create digital portfolio of design ideas (design software interface)			
17	Facilitate design presentation meetings and obtain approvals.			
	Count the number in each column and list the total:	-		

Execution

	Rate your skillset:	I am really good at this.	I will do it if I have to.	I don't want to do it.
1	Preparation of construction documents to adhere to regional building and fire codes, municipal codes, and any other jurisdictional statutes, regulations and guidelines applicable to the interior space			
2	As-built drawings/plan			
3	Demolition plan			
4	(Re)Construction plan			
5	Floor plans			
6	Elevations, sections and detail drawings			
7	Installation details, detail drawings for custom work			
8	Lighting plan/reflected ceiling plan (mechanical plan)			
9	Power and communication plan (data, telephone, electrical etc.)			
10	2-D and 3-D renderings to communicate approved design			
11	Furniture lay-outs			
12	Complete selection and write specification of furniture, fixtures, equipment and millwork			
13	Contract documentation to facilitate pricing, procurement and installation of furniture, fixtures and equipment			
14	Create construction schedules (finishes, door, windows, millwork, furniture etc.)			
15	Create procurement and installation schedules			
16	Distribute bid package and review with owner/contractor(s)			
17	Obtain permits			
	Count the number in each column and list the total:			

Administration

Check the box if…

	Rate your skillset:	I am really good at this.	I will do it if I have to.	I don't want to do it.
1	Coordination and collaboration with allied professionals who may be retained to provide consulting services, including but not limited to architects; structural, mechanical and electrical engineers, general contractors and various specialty consultants			
2	Confirmation that construction documents for non-structural and/or non-seismic construction are signed and sealed by the responsible interior designer, as applicable to jurisdictional requirements for filing with code enforcement officials			
3	Project meetings/meeting management/meeting protocol and minutes			
4	Write scope of work, contracts, value engineering			
5	Develop critical path for project			
6	Manage critical path for project			
7	Proposals e.g., time and fee estimation, RFP process (quotes)			
8	Procurement procedures, purchasing and expediting			
9	Administration of contract documents, bids and negotiations as the client's agent			
10	Shop drawings and submittals			
11	Site visits/installation supervision and field reports			
12	Punch list/deficiency lists and verify corrections			
13	Completion punch list walk through with homeowner and contractor			
14	Project close-out (release of lien wavers, certificate of completion, final payment, warranties and guarantees)			
15	Post-occupancy evaluation			
16	Project accounting (e.g., payment schedules, invoices)			
17	General business accounting and financial reports (QuickBooks or other)			
	Count the number in each column and list the total:			

Beyond Design; Establishing Monetary Value for Creative Skills
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Identify your issues and opportunities!

# of boxes Ck'd	Aprox. %
17	100%
16	94%
15	88%
14	82%
13	76%
12	70%
11	64%
10	58%
9	52%
8	46%
7	40%
6	34%
5	28%
4	22%
3	16%
2	10%
1	4%

Concepts

I am really good at this.	I will do it if I have to.	I don't want to do it.

Execution

I am really good at this.	I will do it if I have to.	I don't want to do it.

Administration

I am really good at this.	I will do it if I have to.	I don't want to do it.