



# Stages of a Project

## Learning Outcomes

**By the end of this unit the learner will be able to:**

- ✓ Explore the design analysis
- ✓ Explore the drawing skills
- ✓ Explore the presentation skills

## Stages of a Project

There are four main stages in a project. The first stage includes; the client's brief, the designer's proposal and the client's agreement to this proposal. The second stage involves gathering information on which to base a creative response and includes the presentation of designs to the client. Stage three starts when drawings are worked up in detail and all the pre-project presentation occurs. All this happens once the client has agreed, to and signed off, the plans. During the fourth stage, the works are carried out, completed and there is a formal hand over to the client. All these four stages of the project, along with the methods of charging the fee, should be set out clearly for the client in the initial proposal. A designer would usually charge for the briefing meeting but the client would not be committed to going to further stages until they had agreed to the proposal put forward.

### Stage One

#### **The Brief and Design Analysis**

The initial meetings with the client not only establish the brief, but also help the designer to 'educate' the clients so that they fully understand how the whole process works. If the designer writes a design analysis after the briefing session, it not only acts as the confirmation of the brief but also creates a memory bank. This might seem an unnecessary measure for just one room but since most projects involve several rooms its value can be clearly understood. The information collected here should help define the brief, give the client confidence and set out the fee structure.

#### **The Proposal**

The proposal should set out the various stages of the project, the drawings and illustrations, and a breakdown of the project fees and services at each stage. In addition it should include all the terms and conditions of the business. A proposal should offer the client some flexibility and should suit the client's requirements and schedule. There are situations where the client should be prepared to negotiate; these could be related to timings, budget or legal and technical difficulties. In these situations the designer should consider phasing the work or looking for different fee structures to suit the project.

### Stage Two

#### **Surveying and Measurements**

Once the proposal has been approved by the client the second stage starts, where the designer assembles the information which forms the basis for the creative process - the survey. A survey should be as comprehensive as possible. A few hours spent on this at the start of a project can save days spent on site checking details or taking supplementary information later on in the project.

## **Creativity and Concept**

After the brief and survey the next most crucial stage for the designer is the creative process. In order to access creativity a designer needs to be totally relaxed and be able to virtually day dream. The creative stage again consists of three stages. The first is to decide on a concept. This requires a completely open mind and the ability to think laterally. For some people exercise and fresh air can help the process; inspiration can come from anything. A concept can be based on the key words picked up at the briefing session with the client. Once the concept has been decided upon, it requires further analysis, detailing and evaluation. Finally, it can be actioned, either in the form of informal images or as a more formalized concept board to show to the client at the presentation stage.

## **Presentation**

Before presenting the concept to the client, spending a little time anticipating questions that might come up can also pay dividends. It is important to pitch the presentation correctly. The designer must show respect for the audience and should retain the right degree of formality and professionalism for the occasion. Audibility, voice, projection, enthusiasm and pace all contribute to a successful delivery, as does the appropriate body language, posture and the use of eye contact.

## **Client Agreement**

It may not be possible for the designer to get the designs signed off straight away but there are ways of encouraging the client through the decision making process. Sometimes this will require some further work and adaptation, and it is important that the designer takes criticism positively, maintains a flexible outlook during a presentation and is not too fixed in his proposals. He should have alternative suggestions in his mind also, particularly in relation to budget

## **Stage Three**

### **Implementation**

After getting the written agreement from the client for the proposed plans and design the designer will collect information on all the products detailed in the design. Next the working drawings are produced which accompany the specifications and tender documents that are given to prospective builders, suppliers and specialists to provide a basis for them to prepare quotations.

### **Specifications**

Specification is the stage that requires a great deal of time. This is a process where all the details in a scheme are pinned down. This process sometimes is as long as the original planning and design. If, for example, a designer specifies a lamp, consideration needs to be given not only to the lamp itself but to the type, size, colour and wattage of the bulb; the size, shape, material and colour of the lampshade and the colour of the flex.

## **Tenders and Estimates**

When selecting the contractors a designer obviously needs to consider their suitability in relation to the size of the project. On occasions the client will also suggest the contractors to tender. In most cases the contractors will be in a competitive tender situation, or it may be a question of reaching agreement through negotiation.

## **Working Drawings, Client Estimates and Contracts**

For the selection of the main contractors usually the designer goes through all the estimates with the client and then the client makes the final selection because the contract will be between the client and the contractor. From the accepted quotations, the client estimates would then be prepared. A working drawing which is prepared for the contractor is a mini-design process itself, requiring development, planning and design detail.

## **Permissions and Approvals**

At this stage the designer will seek any necessary permissions and approvals from the local authority. Sometimes these can cause major delays and problems in relation to the projects. The planning officer should always be contacted when changes are required to be made in the internal layout of the property or to the exterior.

## **Stage Four**

### **Project Management**

A designer can either become a project manager himself or can hand it over to a project manager. Overall project managers are directly responsible for the success of a project. They are fully answerable to the client and should be aware of any risks involved. The project manager has an intimidating list of responsibilities which include; the interior design of the project, the organization of the supply and installation of everything related to that design, instructing the contractors, overseeing the implementation, reporting to the client and looking for the finances. The successful running of a project depends entirely on good communication and team work. All team members should be involved and informed at every stage of the project.

### **Schedules of Work**

The project Manager prepares a schedule of works which needs to be set within a realistic time frame to ensure that reasonable time is allowed for sequencing, ordering and tendering, manufacturing, installation and drying. The programme should be updated monthly and everyone involved in the project should have a copy. Preparation is a key to success and project managers should never allow a client to rush them into starting before everything has been properly scheduled and prepared. Lack of preparation can result in loss of quality.

## Procurement

A procurement schedule is prepared to ensure that materials, finishes, fittings, equipment and furniture are all available for installation. The designer must work hard to establish good working relationships with the suppliers to get the best possible service and help. If for example, something is damaged on delivery, the designer should be confident that the suppliers will provide a replacement quickly.

## Completion and Handover

The designer would carry out thorough and detailed checks on all the works, looking out for any damage to the paint work, lighting, flooring, curtains, etc, so that if there are any problems, these can be rectified before finally handing over to the client. Many designers hold back a sum in order to dress the site with flowers, candles and chocolates to entertain the client when he arrives. On the more practical side the completion should be accompanied by the final invoice, guarantees, and all instruction or information booklets containing instructions for the care of wood, stone flooring would be given to the client. This adds to the professionalism of the overall project.

## Fees

Hourly or daily rates would be appreciated for the following reasons:

- A client who only requires a limited input from the designer.
- The first stage of the project before the definitive brief is completed.
- Time spent locating art works and other specialist items.
- A client who wants to commission a designer on a set limit of hours agreed.
- If it is only a small project.

## Combination of Fee and Mark Up

This is usually applied where projects mainly involve the supply of furnishings, fittings and equipment. This could include a fee for the initial, design concept and then any items supplied would be at a mark up price (percentage on cost). In addition, a project coordination fee can be charged to cover installation of furniture, fittings and equipments especially, if the job was large or complex.

## Fixed Fee

This mostly applies to the projects with mainly design content, with or without the supply of goods. This could include:

- A fixed design fee to cover the design up to a work in progress stage.
- A fixed fee to cover the initial design concept.
- A project coordination fee (hourly or percentage of the total cost of the job) during work in progress stage.
- An administration fee.

## **Retail Charges**

Sometimes it may be appropriate to supply everything at retail cost, in which case no other fees are applicable. However the retail charges can be added in to the consultancy fee. Whatever the method of charging is, the fee should be agreed with the client at an early stage.

## **Calculating the Fee**

When calculating the design fee, designers should consider the time they are likely to spend on each stage of the project as agreed with the client. At this stage the designers should also consider which job is actually worth it to them when using any of the above mentioned methods for charging, or which is worth charging on a square footage basis. As a general rule the budget figures are placed against various elements of the job and then calculated around a set percentage of the total budget cost. This percentage can be adjusted according to the project; it will be higher for a small project and lower for a larger one.

### **Further Reading:**

- ✓ *Managing Projects, (2005), By S. K. Palhan*
- ✓ *Assessing Forestry Project Impacts: Issues and Strategies, (1996), By H. M. Gregersen*