

Initial Meeting Agenda

To: *Homeowner(s)*
From: *Contractor*
Date:

Meeting is scheduled for: *(date/time)*
Meeting location will be at: *(location where work is to be done)*
Homeowner's Contact info: *(telephone #s)*

Meeting Guidelines

- Review time set aside for the meeting. Is ___ hours for the meeting agreeable?
- How will we deal with possible interruptions during today's meeting? Will there be other possible interruptions during the meeting? This meeting requires focused time that will help us learn about your needs and goals.

Your agenda items

(Description of project)

Key issues for discussion:

-
-

Time frame:

Investment:

Contractor's Agenda

- Address the items on your agenda, your priorities and timeline
- Take a tour of the home and areas affected
- Ask questions in order to learn about your lifestyle and design needs
- Review an appropriate financial investment range for your project
- Decide if our Design/Build services match your needs

Saying No/Saying Yes

It is OK to say no if you decide that we are not a match. We hope that you will feel comfortable telling us so. We might have a few options left to discuss. If you say yes, we'll need to agree what to do next to help you fulfill your remodeling needs.

How do homeowners start this process? (may include a brief summary of the following):

Design Agreement

Feasibility Agreement

Conditions' Assessment Agreement

Summary

- Are you comfortable with the decisions made today?
- Scheduling the next event



Pre-Construction Meeting Agenda

To: *Homeowner(s)*

From: *Contractor*

Date:

Meeting is scheduled for: *(date/time)*

Our Agenda

Design

- Additional Work Orders
 - Administrative fee/design review
- Decision Sheet

Financial

- Bumps in the road
- Payments

Personnel

- Security/Alarm system/Keys
- Trade contractors and other personnel
- Point of contact
- Weekend work
- Pet peeves

Communication

- Weekly review meetings
- Letter to the neighbors

Production

- Daily House Open and Close Procedures
- Children and Pets
- Construction Issues
 - Preparing the house for remodel
 - Staging Areas
 - Curtain Walls
- Site Issues
 - Landscape Care
 - Port-a-John
 - Dumpster

Marketing

- Photographs
- Job Site Sign
- Referral



Weekly Meeting Agenda

To: *Homeowner(s)*

From: *Contractor*

Date:

Meeting is scheduled for: *(date & time)*

Items for Discussion and Decisions needed for...

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-

Review the Homeowner's Agenda

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Review the Contractor's Agenda

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Work that has been done this week

-
-

Work that you will be able to expect for the week to come

-
-

Payment Schedule

Next meeting time

Temperature Check!

