

Helping Architecture Firms Scale with On-Demand, US-Trained Remote Architects (Level I, II & III)

Pre-Design Client Discovery Checklist

Reduce Redlines by Getting It Right the First Time

Instructions: Complete this checklist during initial client meetings before beginning any design work. Use this as a conversation guide to ensure comprehensive project understanding. Document all responses for future reference throughout the project.

PROJECT VISION & GOALS

Primary Project Objectives

What is the main purpose of this project? (Residential: family growth, aging in place, entertaining, etc. | Commercial: business expansion, efficiency, branding, etc.)

☐ Notes: _____

How does this project support your long-term goals? (5-10 year vision)

☐ Notes: _____

What does success look like for this project? (Specific outcomes, feelings, functionality)

☐ Notes: _____

What problems are you solving with this project? (Specific outcomes, feelings, functionality)

☐ Current space limitations: _____

☐ Functional issues: _____

☐ Other challenges: _____

Inspiration & References

Collect visual references (Pinterest boards, magazine clippings, photos)

☐ Styles they LOVE: _____

☐ Styles they DISLIKE: _____

Identify projects they admire (Buildings, spaces, architectural features)

☐ Local examples: _____

☐ Online references: _____

FUNCTIONAL REQUIREMENTS

Space Programming

Required rooms/spaces and approximate sizes:

☐ Living spaces: _____

☐ Bedrooms: _____

☐ Bathrooms: _____

☐ Kitchen/dining: _____

☐ Work spaces: _____

Helping Architecture Firms Scale with On-Demand, US-Trained Remote Architects (Level I, II & III)

Pre-Design Client Discovery Checklist

Reduce Redlines by Getting It Right the First Time

- ☐ Storage needs: _____
- ☐ Utility areas: _____
- ☐ Special purpose rooms: _____

Occupancy & Usage Patterns

Current household/business size: _____

Expected changes in next 5-10 years: _____

Daily routines and traffic patterns:

- ☐ Morning routines: _____
- ☐ Evening activities: _____
- ☐ Weekend usage: _____

Special Requirements

Accessibility needs (current or future)

- ☐ Mobility considerations: _____
- ☐ Universal design preferences: _____

Technology requirements:

- ☐ Home automation/smart systems
- ☐ Advanced security systems
- ☐ High-speed internet infrastructure
- ☐ Audio/visual systems
- ☐ Electric vehicle charging

Special equipment or infrastructure:

- ☐ Large appliances: _____
- ☐ Workshop tools: _____
- ☐ Exercise equipment: _____
- ☐ Other: _____

Future Flexibility

Potential future additions or modifications:

- ☐ Planned expansions: _____
- ☐ Possible room conversions: _____
- ☐ Aging-in-place considerations: _____



Helping Architecture Firms Scale with On-Demand, US-Trained Remote Architects (Level I, II & III)

Pre-Design Client Discovery Checklist

Reduce Redlines by Getting It Right the First Time

DESIGN PREFERENCES

Architectural Style

Preferred architectural styles (with visual examples)

- ☐ First Choice: _____
- ☐ Second choice: _____
- ☐ Styles to avoid: _____

Materials & Finishes

Exterior materials preferences:

- ☐ Brick ☐ Stone ☐ Wood ☐ Metal ☐ Stucco
- ☐ Fiber cement ☐ Vinyl ☐ Other: _____
- ☐ Specific preferences: _____

Interior finish preferences:

- ☐ Flooring: _____
- ☐ Wall treatments: _____
- ☐ Ceiling treatments: _____
- ☐ Trim/millwork: _____

Color & Aesthetics

Color palette preferences:

- ☐ Preferred colors: _____
- ☐ Colors to avoid: _____
- ☐ Neutral vs. bold preferences: _____

Design personality:

- ☐ Traditional ☐ Contemporary ☐ Transitional
- ☐ Industrial ☐ Farmhouse ☐ Minimalist
- ☐ Eclectic ☐ Other: _____

Lighting Preferences

Natural light priorities:

- ☐ Rooms needing maximum daylight: _____
- ☐ Privacy vs. light balance: _____

Artificial lighting preferences:

- ☐ Ambient lighting style: _____
- ☐ Task lighting needs: _____
- ☐ Decorative lighting desires: _____

Helping Architecture Firms Scale with On-Demand, US-Trained Remote Architects (Level I, II & III)

Pre-Design Client Discovery Checklist

Reduce Redlines by Getting It Right the First Time

BUDGET & TIMELINE

Financial Parameters

Total project budget: \$ _____

Budget breakdown understanding:

- ☐ Construction costs (~75-80%)
- ☐ Design fees (~10-15%)
- ☐ Permits & fees (~3-5%)
- ☐ Contingency (~10-15%)

Financing status:

- ☐ Cash
- ☐ Construction loan
- ☐ Refinance
- ☐ Other: _____

Budget priorities ranking:

1. _____
2. _____
3. _____

Schedule Requirements

Desired project completion date: _____

Hard deadline requirements: _____

Seasonal considerations:

- ☐ Preferred construction seasons: _____
- ☐ Times to avoid: _____

Occupancy during construction:

- ☐ Staying in current space
- ☐ Moving out temporarily
- ☐ Phased construction approach

SITE & REGULATORY

Site Analysis

Site survey completed: Date: _____

Site conditions documented:

- ☐ Topography challenges: _____
- ☐ Drainage issues: _____
- ☐ Existing vegetation to preserve: _____
- ☐ Views to capture: _____
- ☐ Views to block: _____

Helping Architecture Firms Scale with On-Demand, US-Trained Remote Architects (Level I, II & III)

Pre-Design Client Discovery Checklist

Reduce Redlines by Getting It Right the First Time

Utility & Infrastructure

Utility locations confirmed:

- ☐ Electric service
- ☐ Gas service
- ☐ Water service
- ☐ Sewer/septic
- ☐ Internet/cable

Utility capacity assessment:

- ☐ Electrical service adequacy: _____
- ☐ Other utility limitations: _____

Regulatory Requirements

Zoning compliance verified:

- ☐ Setback requirements: _____
- ☐ Height restrictions: _____
- ☐ Lot coverage limits: _____

HOA/Covenant restrictions reviewed:

- ☐ Architectural guidelines: _____
- ☐ Approval process requirements: _____

Environmental considerations:

- ☐ Wetlands ☐ Floodplain ☐ Historic district
- ☐ Tree preservation requirements
- ☐ Other: _____

STAKEHOLDERS & COMMUNICATION

Decision Makers

Primary contacts identified:

- ☐ Main decision maker: _____
- ☐ Secondary decision maker: _____
- ☐ Other influencers: _____

Communication Preferences

Preferred communication methods:

- ☐ Email ☐ Phone ☐ Text ☐ Video calls
- ☐ Best times to contact: _____

Meeting preferences:

- ☐ In-person ☐ Virtual ☐ Combination
- ☐ Preferred meeting frequency: _____

Helping Architecture Firms Scale with On-Demand, US-Trained Remote Architects (Level I, II & III)

Pre-Design Client Discovery Checklist

Reduce Redlines by Getting It Right the First Time

Project Team

Other professionals involved:

- | | |
|---|--|
| ☐ Interior designer | ☐ Landscape architect |
| ☐ Structural engineer | ☐ MEP consultants |
| ☐ Contractor (if selected) | |
| ☐ Others: _____ | |

NEXT STEPS & DOCUMENTATION

Immediate Actions

Site visit scheduled: Date: _____

Additional information to collect:

- ☐ Previous drawings/surveys
- ☐ Inspiration images organized
- ☐ Reference project visits planned

Documentation

Meeting notes distributed to client

Follow-up questions identified:

1. _____
2. _____
3. _____

Client confirmation received on key items:

- ☐ Budget parameters
- ☐ Timeline expectations
- ☐ Scope of work
- ☐ Design preferences



Helping Architecture Firms Scale with On-Demand,
US-Trained Remote Architects (Level I, II & III)

Pre-Design Client Discovery Checklist

Reduce Redlines by Getting It Right the First Time

ADDITIONAL NOTES

Use this space for unique project considerations, special client requests, or important reminders:

Checklist completed by: _____ Date: _____

Client signature: _____ Date: _____

This checklist serves as the foundation for all design decisions. Refer back to these notes throughout the project to ensure alignment with client vision and minimize revision cycles.



Scan to Download Our Brochure