

HOW AND WHEN TO COMMUNICATE WITH CUSTOMERS			
COLOR KEY			
EMAIL			
FACE TO FACE			
PHONE			
FAMIS/WORQS			
FORMAL			
EDUCATIONAL HANDOUT			
CUSTOMER SIGN-OFF			
PROJECT PHASES		LIFE CYCLE PROJECT MANAGEMENT	
SCOPING AND FEASIBILITY		COMMUNICATION	HOW
		Project Delivery Unit informs Customer that PP-10 has been received.	A&E automated email
translate academic or department request/initiatives into potential facility needs and determine if a capital construction project is		PM sends introductory email to customer/set appt or set timeline expectations	
DELIVERABLES			
1) Scope Statement to include order of magnitude estimates of			
2) Feasibility Report			
3) Options - Alternate Approaches		Meet with Customer	FACE TO FACE
4) Flexibility Matrix		Send Meeting notes and timeline for next meeting	
5) Communication Management Plan		Formal Prelim Estimate Letter with scope	Copy to all users/contact person/dean
		Confirm receipt of letter and ask if any questions	
		Send email to remind customer of estimate expiration date. Determine status and schedule	
		If project budget is approved, ask for written approval and account number. Outline next steps and schedule.	Client Sign Off
		Or, depending on scope, who it is, and the complexity, meet with the client	
PHASE EXIT - STAGE GATE TO PROGRAMMING		Email Customer requesting an account number to fund the project. Copy management.	

PROGRAM	COMMUNICATION	HOW
Deliverables: An approved program, a written statement setting forth design objectives, constraints, and criteria for a project including space requirements and relationships, flexibility and	Email customer to explain that a PSP will be selected and that you and PSP will be coming by to verify the scope of work	
further develop selected option	Meet PSP at the site to describe scope of work and introduce proposed consultant to the customer	Update customer re: PSP contract status and timeline
<p align="center">DELIVERABLES</p>	With contract in place, set up "kick-off meeting with customer and PSP"	HANDOUT - "Your Guide to Renovation Project Delivery"
1) Project Plan, a written statement setting forth project objectives,	Send Meeting notes	
2) Program, design criteria including space requirements and relationships, flexibility and expandability, special equipment and	Send Program to all customers for additions/corrections	Email with PSP's program attached
3) Design Options	Obtain written confirmation of corrected program	<p align="center">Customer Sign Off</p>
4) Resource Requirements	Email client next steps and schedule and update FAMIS	Email preliminary schedule cut and pasted from FAMIS into EXCEL
5) Project Team	<p>COMMISSIONING: Define any project requirements -- "Mine" for customer information re: acceptance criteria</p>	COMMISSIONING HANDOUT when applicable
6) Risk Matrix		
<p align="center">PHASE EXIT - STAGE GATE TO SCHEMATIC DESIGN</p>		

SCHEMATIC DESIGN	COMMUNICATION	HOW
develop a clearly defined design with a comprehensive scope,		
DELIVERABLES		
1) Approved Schematic consisting of drawings and other		
2) Approved Scope, Schedule and Budget	Make appointment by email to review proposed SD/DD plans, finishes, materials - copy Management	Email to coordinate appt time and place
3) Identified and Documented Quality Standard	Meet to present Schematic Design	FACE TO FACE
4) Documented Commissioning Level	REPEAT AS OFTEN AS NECESSARY DEPENDING ON SCOPE, COMPLEXITY, BUDGET, AND THE SUCCESS IN ACCOMMODATING THE PROGRAM	FACE TO FACE
5) Procurement Plan	Obtain written confirmation of accepted plans, finishes, etc.	Customer Sign Off
	HYPERLINK to conference record form	Attach preliminary schedule cut and pasted from FAMIS into EXCEL
	Review statement of probable construction costs with client	FACE TO FACE
	If necessary, send client a written request for additional funding. Update FAMIS.	Copy management

PHASE EXIT - STAGE GATE TO DESIGN DEVELOPMENT

DESIGN DEVELOPMENT		COMMUNICATION	HOW
refine the scope and further develop the approved schematic to work out a clear, coordinated description of all aspects of the project			
DELIVERABLES			
1) Approved Design Documents that further develop the structural, mechanical and electrical drawings and specific equipment and materials; estimate of probable construction costs		Complexity may require that all continue to review proposed DD plans, finishes, materials - copy Management	
2) Approved Purchase Orders		Meet to go over materials, finishes, final design, scope specifics, budget and schedule.	FACE TO FACE
3) Approved Contracts		REPEAT AS OFTEN AS NECESSARY DEPENDING ON SCOPE, COMPLEXITY, BUDGET, AND THE SUCCESS IN ACCOMMODATING THE PROGRAM	FACE TO FACE
		Discuss temporary quarters, moving, boxes, telephone arrangements, etc.	
		Obtain written confirmation of accepted plans, finishes, etc.	Customer Sign Off
			Attach preliminary schedule cut and pasted from FAMIS into EXCEL
		Review statement of probable construction costs with client	FACE TO FACE
		If necessary, send client a written request for additional funding. Update FAMIS.	Copy management
		If necessary, write client a summary of why costs have increased and document all changes in scope	
PHASE EXIT - STAGE GATE TO CONSTRUCTION DOCUMENTS			

CONSTRUCTION DOCUMENTS	COMMUNICATION	HOW
refine and further detail the approved design development documents to form a coordinated comprehensive set of documents	Contact customer to finalize all decisions re: finishes, furniture, etc.	
	Showroom visits/Samples delivered/Finish Boards/	FACE TO FACE
DELIVERABLES	Obtain written confirmation of finishes, etc.	Customer Sign Off
1) Approved CDs, drawings and specifications detailing the requirements for the construction of a project	Copy customer on all design decisions governed by cost, existing conditions, code, ADA, etc. throughout CD phase	
	Present CD Package to Customer	FACE TO FACE
	Ask Customer to sign off on CD package	Customer Sign Off
	Update Customer on Schedule for Construction based upon delivery method	HANDOUT - "Your Guide to the Construction Process - Glossary"
	If necessary, write client a summary of why costs have increased and document all changes in scope	
PHASE EXIT - STAGE GATE TO BIDDING & NEGOTIATION		

BIDDING/PROPOSAL		COMMUNICATION	HOW
advertise project and solicit bids; select contractor(s)		Invite Customer to selection committee discussion of GC qualifications if CSP	
DELIVERABLES		FINAL BID	PRESENT FINAL BID TO CUSTOMER
1) Selected Contractor and Signed Contract		Ask Customer for approval to proceed and determine scope of work	Customer Sign Off
2) Revised Budget and Schedule		Keep Customer updated on the status of contracts	Email status
3) Notice to Proceed		Notify all affected by construction	Create Distribution List in Outlook
		Hold "Town Hall" meeting for all affected occupants, neighbors, stakeholders	POST JOB SIGN
		Coordinate time for Pre-Con PRECON	Set up distribution list for Pre- Con Mtg.
ADDED FUNDING (if needed) Construction Contract(s)			
PHASE EXIT - STAGE GATE TO CONSTRUCTION			
CONSTRUCTION		COMMUNICATION	HOW
build/renovate facility, spaces and systems		Copy all RFI's submittal logs, field reports, meeting minutes, submittal logs, etc., to customers	
DELIVERABLES		If there is ANY bad news or changes that affect the money or the schedule, write to the customer immediately	
1) Completed Punch and Corrective Actions		Hold regularly scheduled construction meetings appropriate to the stage of construction	
2) Certificate of Substantial Completion		Update Schedule as often as it changes	
3) Scope Verification			
4) O&M Manuals			
5) Warranties			
6) Commission Report and T&B Report			
OCCUPANCY/SUBSTANTIAL		COMMUNICATION	HOW
move in furniture and occupants		Testing if required	
DELIVERABLES			Customer Sign Off
1) Maintenance Turnover		Substantial Completion Certificate	
2) Occupant Relocation		Punch List Completed	Customer Sign Off
PHASE EXIT - STAGE GATE TO CLOSING			

CLOSE		COMMUNICATION	HOW
reconcile all contracts, payments and archive project documents, such as O&M manuals, as-builts, etc.			
		MOVE IN	Project Manager visits site that day
DELIVERABLES		Warranty Letter to customer so that he/she know whom to notify if something breaks	
1) Contract(s) Reconciliation and Close		Thank you notes	
2) Funding Account Reconciliation and Close		Celebration Party	
3) Archive of Project Documents including 'as-builts'			
4) Lessons Learned			
5) Administrative Close			
PHASE EXIT - STAGE GATE TO WARRANTY PERIOD			
WARRANTY PERIOD		COMMUNICATION	HOW
one year (less one day) from substantial completion			
DELIVERABLES			
1) Corrective Actions			
2) Close of Warranty Period			