

When it comes to process you have TWO options. Either straight to LCC from the initial conversation or to a free initial meeting, then into the LCC if they are qualified.

Process #1 - Using free meeting

- Step 1 incoming call
- Step 2 free initial meeting (qualify the project and the client)
- Step 3 LCC
- Step 4 Design
- Step 5 Build

Process #2 - Straight to LCC

- Step 1 incoming call (use incoming call script in training area)
- Step 2 LCC
- Step 3 Design
- Step 4 Build

Process #1 - Using free meeting (ask the expert)

EMAIL

Hi Richard

This email is to confirm your **Free Ask The Expert Initial Consultation** appointment for **[INSERT DAY, DATE, TIME]**. Please allow up to 45 minutes for this appointment with (your name).

Please find attached:

- Project Questionnaire PDF
- Information Brochure PDF (Please read in advance of your appointment as it outlines the project roadmap we use and how we work with clients)
- Frequently asked questions PDF

Please complete the questionnaire and email back to us or bring it to your appointment; alternatively arrive 10 minutes earlier to complete at the office.

Our process is

- 1) Initial ask the expert appointment <<< you are HERE
- 2) Project diagnosis
- 3) Design
- 4) Build
- 5) Enjoy

At your **Ask The Expert Initial Consultation** we will

- Understand more **about you** and what you want to **achieve**
- Determine your current **situation** and resources
- Explain the **journey of our process** at a high level
- Provide you with an action plan of your next steps based on your **objectives** and current **situation**

Your **Initial Consultation** will NOT cover

- Specific design ideas
- Your project cost
- Solve any complex problems

This meeting is to answer generic projects questions, understand what you want to achieve and determine your next steps.

After the **Initial Consultation**, we will outline your next steps. If we think we are a good fit for your project, and you wish to proceed will book a [INSERT YOUR LCC NAME]. [INSERT architects name] will discuss with you what will be covered in this step.

Optional

We are holding for you, based on a positive outcome from your Initial Assessment:

[LCC] – [DATE 2]. (please allow 75 minutes) A confirmation email will be sent with details following your **Initial Consultation** on the **[DATE 1]**

If you proceed with step 2 the investment of the [INSERT YOUR LCC NAME] is \$xxxx; and is valid for 3 months.

If we do not feel we are your best option, we will suggest an expert that may be a better fit for your project.

Our office is at [INSERT ADDRESS], [give a description of how to get there and where to park]. The entrance of the building is [INSERT]. Alternate parking is also available at [INSERT] within easy walking distance.

If you are unable to attend your appointment, please notify us at least two working days in advance. We will offer you a suitable alternative.

We look forward to meeting you.

Best regards

PDF QUESTIONNAIRE - Free Ask The Expert Initial Consultation

1. Your name
2. Your home address
3. Your cell phone number
4. Your email address
5. Do you already have land for this project?
6. If so where it is?
7. **Budget:** Do you have finance approved for your project or are you looking to get finance?
8. **Scope:** Briefly explain the project you are considering?
9. **Timeframes:** Do you have any timeframes you need/would like to meet?
10. Have you selected a builder/general contractor yet or are you going to be an owner builder?
11. Who are the key people who will be using/living in this space?
12. Who are the key decision makers?
13. Why did you contact me?
 - Dream home
 - Just need a permit
 - Need drawings
 - Not sure
14. What value do you feel an architect can bring to your project?
15. What questions are you hoping to have answered from the initial meeting?

16. On a scale of 1-10 how important is design to you?

17. Have you ever done a construction project before? If so how many?
How did that project go?o you have a preference for material type on your project?

Reminder

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