



# Design & Business Tools Checklist

(with examples of what we use)

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<b>Drawing Software</b>	SketchUp Pro with Layout
<b>Presentation Graphics</b>	Photoshop (Lesley) InDesign (Kate)
<b>Project Management</b>	Asana
<b>Client Online Booking</b>	Acuity
<b>Bookkeeping</b>	Quickbooks (Integrates with Gather and Ivy)
<b>Calendar</b>	Google
<b>Specifying</b>	Gather (Kate) Ivy (Lesley)
<b>File Storage</b>	Dropbox (Kate) Google Drive (Lesley)
<b>Social Media Scheduling</b>	Later (Kate) MeetEdgar (Lesley)
<b>Password Management</b>	Lastpass (Lesley) Spreadsheet (Kate)
<b>Website</b>	Wordpress (Lesley) Squarespace (Kate)
<b>Time Tracking</b>	Harvest (Kate) Ivy (Lesley)

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## Remember!

Test out a few options before committing. What works for someone else might not work for you. Compare price options and plans. If they offer month-month, use that for a little while (ideally for the duration of an entire project) before committing to a year.

There are many options for tools to run your interior design business. You just have to find the ones that work best for you and *stick with them!*



# Typical Interior Design Project Hours

Design Service	Design	Ordering	Implementation
Kitchen Remodel w/ Drawings	80 - 120	20 - 30	45
Kitchen Refresh (no drawings)	25 - 40	5 - 10	20
Bathroom Remodel w/ Drawings	50 - 65	20 - 30	25
Bathroom Refresh (no drawings)	20 - 25	5 - 10	20
Living/Family Room Design	40 - 50	25 - 35	25
Dining Room Design	30 - 40	20 - 25	25
Master Bedroom Design	30 - 40	20 - 25	25
Secondary Bedroom Design	20 - 25	10 - 20	25
Home Office Design	20 - 25	20 - 25	25
Entryway	5 - 10	5 - 10	15
Exterior Finish Selections	10 - 20	-	-
Interior Finish Selections	40 - 50	-	-

# Estimate your Hours

Step	Estimate of Hours	Notes	Staff
Consultation		Meet with Client	
Client Onboarding		Prepare Proposal, Invoice, Enter into systems, Contract and retainer	
Site Survey		Measure, photograph, and Inventory	
Team Meeting		Meet internally to review project requirements and strategy	
Drawings 20%		Draft initial plans	
Mood Board		Create mood board to visual reflect overall look and feel of project.	
Client Feedback		Client will have opportunity to review Concept Design Package.	
Revisions		Any requested revisions will be provided for final approval.	
Schedule Trade Day		Schedule each trade member for Trade Day	
Trade Day (Existing-Construction)		Meet with all tradespeople on-site to discuss project needs. Trades will walk away with necessary information to provide estimate for labor.	
Trade Day (Pre-Construction)		Meet with building professionals (builder, architect, contractor, kitchen and bath specialist, etc.) to review project parameters.	
Quoting		Receive and organize quotes from trades and vendors.	
Source FFE		Source all furnishings, lighting, etc. included in the scope and order samples.	
Source Finishes		Source all finishes such as tile, paint, wallpaper, counters, specialty finishes, millwork materials, etc.	
Finalize Drawings		Complete all necessary drawings.	
Prepare Specifications		Finalize specifications for all merchandise, finishes, and trades labor (if necessary)	
Prepare for Presentation		Print out necessary docs for client and samples	
Design Presentation		Present to clients	
<b>Phase II</b>			
Feedback & Revisions		Prepare and send revisions	
Place Orders		Create PO's and place orders for all merchandise.	
Schedule Trades Work		Contact trades, prepare payments and schedule.	
Accessories Shopping		In-the-field accessories shopping	
Track Orders		Check on the status of orders weekly.	
Prepare for Installation Day		Organize accessories, supplies, etc.	
Install Day		Furniture and accessories are delivered, assembled, and put in place.	
Punch List		Identify outstanding items and next steps to resolve them.	
Resolve Punch List		Take care of outstanding issues	
Final Invoicing		Present final invoice	
Client Binder and Thank you!		Present client with binder and find way to say Thank you!	



# Install Day Box Checklist

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## TOOLS

- WALL HANGING TOOLS
- SMALL TOOLKIT
- BLUE TAPE
- HAMMER
- SCREWDRIVERS
- BOX CUTTER
- IRON
- STEAMER
- SCISSORS
- BLADE SCRAPER
- FURNITURE MOVING PADS

## CLEANING

- GLASS CLEANER
- WOOD POLISH
- GOO BE GONE
- BROOM
- SWIFFER
- BLEACH PEN
- TRASH BAGS
- SHOE COVERS

## SELF CARE

- TYLENOL
- BANDAIDS
- WATER BOTTLES
- SNACKS

## MISCELLANEOUS

- CLIENT BINDER
- FRESH FLOWERS!

TAPE CHECKLIST INSIDE LID