

Intuitive Concepts' Service Matrix© 7/2020

Function		Existing Buildings					New Builds			Responsible Party				
		Site Evaluation	Commercial Kick-Start 6.a,b	Residential Kick-Start 6.a,b,c	Commercial Mastery 1,7.a,b,c	Residential Mastery 1,7.a,b,c	Site Evaluation	Commercial New Build 2,8.a,b,c	Residential New Build 2,8.a,b,c	Client	IC	Architect	Guide	Landscape Designer
Data Gathering via Telephone										X	X			
1	1	Discuss objectives for analysis 1- important factors, goals, and success measures	•	•	•	•	•	•	•	•	•	•	•	•
2	2	Identify stakeholders 2 & 9	•	•	•	•	•	•	•	•	•	•	•	•
3	3	Discuss structure and blueprints		•	•	•	•	•	•	•	•	•	•	•
4	4	Identify preliminary scope, fees, and timelines 5	•	•	•	•	•	•	•	•	•	•	•	•
5	5	Schedule initial meeting & agree on funding. <i>NOTE: A 30-day lead time is a minimum in order to adequately prepare for the project. If less than 30 days, a rush fee may apply.</i>	•	•	•	•	•	•	•	•	•	•	•	•
6	6	Prepare for consult	•	•	•	•	•	•	•	•	•	•	•	•
I. On-site Assessment (incorporates Phase I-VII)														
7	7	Interview client	•	•	•	•	•	•	•	•	•	•	•	•
8	8	Discuss and prioritize preliminary goals		•	•	•	•	•	•	•	•	•	•	•
9	9	Obtain detailed stakeholder information 2 & 9		•	•	•	•	•	•	•	•	•	•	•
10	10	Review research of site	•	•	•	•	•	•	•	•	•	•	•	•
II. Identify Project Scope														
11	11	Review history of site	•	•	•	•	•	•	•	•	•	•	•	•
12	12	Review neighborhood			•	•	•	•	•	•	•	•	•	•
13	13	Identify unique issues 1	•	•	•	•	•	•	•	•	•	•	•	•
14	14	Establish final goals and priorities		•	•	•	•	•	•	•	•	•	•	•
15	15	Establish success measurements		•	•	•	•	•	•	•	•	•	•	•
16	16	Submit Customer Service Agreement for signature (confirm scope, flow, and deliverables)		•	•	•	•	•	•	•	•	•	•	•
III. Review Design & Build Process														
17	17	Discuss process	•	•	•	•	•	•	•	•	•	•	•	•
18	18	Discuss industry standards & zoning requirements				•	•	•	•	•	•	•	•	•
19	19	Discuss energy days				•	•	•	•	•	•	•	•	•
IV. Establish Funding														
20	20	Discuss return on investment (ROI)	•	•	•	•	•	•	•	•	•	•	•	•
21	21	Discuss client living/business requirements during construction					•	•	•	•	•	•	•	•
22	22	Review goals, timelines, and deliverables		•	•	•	•	•	•	•	•	•	•	•
23	23	Discuss project budget (materials, labor, etc.)		•	•	•	•	•	•	•	•	•	•	•
24	24	Monitor relevant permits					•	•	•	•	•	•	•	•
V. Field Measurements														
25	25	Review survey plat			•	•	•	•	•	•	•	•	•	•
26	26	Perform external site survey	•			•	•	•	•	•	•	•	•	•
27	27	Perform assessment with equipment and meters				•	•	•	•	•	•	•	•	•
28	28	Identify Feng Shui risk factors	•			•	•	•	•	•	•	•	•	•
29	29	Take photographs	•			•	•	•	•	•	•	•	•	•
30	30	Suggest go/no-go strategy	•				•	•	•	•	•	•	•	•
VI. Interior Survey														
31	31	Review blueprints		•	•	•	•	•	•	•	•	•	•	•
32	32	Perform internal site survey	•	•	•	•	•	•	•	•	•	•	•	•
33	33	Perform assessment with equipment and meters		•	•	•	•	•	•	•	•	•	•	•
34	34	Identify Feng Shui risk factors	•	•	•	•	•	•	•	•	•	•	•	•
35	35	Take photographs	•	•	•	•	•	•	•	•	•	•	•	•
36	36	Suggest go/no-go strategy	•				•	•	•	•	•	•	•	•
VII. Make Recommendations (for kick-start consults this is the final phase; for mastery consults this was a preliminary phase)														
37	37	Review findings of this phase of the design / action plan	•	•	•	•	•	•	•	•	•	•	•	•
38	38	Evaluate risk periods for the next 10 years		•	•	•	•	•	•	•	•	•	•	•
39	39	Complete a kick-start report and energy map		•	•	•	•	•	•	•	•	•	•	•
40	40	Reinforce deliverables		•	•	•	•	•	•	•	•	•	•	•
41	41	Perform a space clearing		•	•	•	•	•	•	•	•	•	•	•
42	42	30 days of unlimited telephone and email support	•	•	•	•	•	•	•	•	•	•	•	•
VIII. Perform Building Analysis														
43	43	Determine landscape impacts			•	•	•	•	•	•	•	•	•	•
44	44	Identify construction vulnerabilities					•	•	•	•	•	•	•	•
45	45	Determine locations for rooms or functions					•	•	•	•	•	•	•	•
46	46	Determine remedies and their cross impacts		•	•	•	•	•	•	•	•	•	•	•
IX. Perform Occupant Analysis														
47	47	Determine Ming Gua impacts (up to 8 people complimentary, others for an additional fee)		•	•	•	•	•	•	•	•	•	•	•
48	48	Determine stakeholders personal areas (consuming, injury, etc.) 2 (up to 2 people complimentary, others for an additional fee)				•	•	•	•	•	•	•	•	•
49	49	Determine locations for rooms or functions			•	•	•	•	•	•	•	•	•	•
50	50	Perform a compatibility analysis for up to 2 people 2 & 9			•	•	•	•	•	•	•	•	•	•
51	51	Determine remedies and their cross impacts		•	•	•	•	•	•	•	•	•	•	•
X. Preconstruction Meeting														
52	52	Review modifications and impacts to drawings/project					•	•	•	•	•	•	•	•
53	53	Make required changes					•	•	•	•	•	•	•	•
54	54	Complete change order request (if initial funding estimate changed)				•	•	•	•	•	•	•	•	•
55	55	Review hard/landscape products and selections (external)					•	•	•	•	•	•	•	•
56	56	Review product and color selections (external & internal)					•	•	•	•	•	•	•	•

