

The Selections Process



WHAT ARE 'SELECTIONS?'

Selections are the products you choose which make your project custom and unique. These include plumbing fixtures, tile, counters, windows, etc. After the Schematic Design is approved you will begin to pick the items that you like. You can use our allowances from the schematic budget to help guide how your selections impact the overall budget. We create a project website for you that has all selection decisions divided into industry categories. Certain decisions will impact later decisions and we walk you through the process linearly.

For some selections, our project team is just looking to record your preferences; this helps with construction planning and will be used as an on-site reference for subcontractors. For these, it's often unnecessary for you to pick particular products: for example, you may indicate that you like a particular look for door casings, that you prefer round gutters, that you'd like the flooring in your addition to match what already exists elsewhere in the house, or even that you have "no preference" and are comfortable allowing our skilled contractors to make suggestions.

Other selections will require you to pick specific products. Examples of these include plumbing fixtures, lighting fixtures, and appliances. To choose these, you'll be visiting showrooms or shopping online: your selections list can be a valuable reference when you're talking with sales representatives or searching for products.

WHEN ARE SELECTIONS MOST IMPORTANT?

Trinity Design/Build requires all selections to be finalized before construction on your project can begin.

The last stage of your design phase is a great time to start tackling selections. Finalizing selection decisions before the start of construction allows your project manager to work around extended lead times or other fulfillment issues and schedule subcontractors and inspections knowing that materials will be on-site. Our experience proves that it also saves our clients time and money.

Your project team will guide you through your selections list. As you discuss your preferences, receive quotes from showrooms, or find products online, we'll record those decisions in your selections sheet. Eventually you'll be asked to formally "Approve" each selection: this lets us know that we can proceed to ordering selected materials.

Front-loading the work of selections before your construction begins is essential for the efficiency of your project, but it's also a great opportunity to think through decisions and solidify your overall vision without the pressure of an on-site deadline (and the headache of last-minute phone calls for rushed decisions). There's always a possibility that selected materials are unavailable or out-of-stock by the time they're needed, but selecting a replacement, if necessary, is much easier when you're already familiar with your options and have already developed a strong idea of your preferences.

RESOURCES FOR MAKING SELECTIONS

It's important to remember that no one approach to the selection process is the right one: some people delight in specifying everything, and for others it's overwhelming.

Your project team is here to help: we can provide options to choose from, recommend product lines, get information from manufacturers, and answer general questions.

Trinity Design/Build (TDB) maintains a directory of recommended vendors for clients organized by category; this includes local vendors with showrooms, and the names of representatives that TDB has a relationship with. This can be a great place to start: your project team will also provide specific resources in line with any style preferences you might have expressed during your design phase.

SELECTIONS SHEET TIPS & TRICKS

TDB uses Smartsheet to organize project schedules and selections. If you've used spreadsheets before, your Smartsheet selections list will look very familiar. Smartsheet has some added benefits for collaboration over a regular spreadsheet: you can post comments or upload attachments to each selection row, and we can request your approval when selections have been recorded.

Most of the data in the selections sheet will be locked for editing by your project team; this gives us the opportunity to double-check the selections you make

against the plans and your budget. As a client you can comment, upload attachments, and approve items (by selecting "Approved" in the "Approval Status" column). You might ask a question about a particular selection or give us clarifying information in a comment or attach a picture of a preferred style: feel free to use this capability in any way you'd like.

Finally, your selections sheet is available in "Grid" or "Card"-style views: look for a button in the toolbar that allows switching between views. Smartsheet is a flexible platform; if there's a view or filter that would be helpful for you as you make selections, please let us know.

A NOTE ABOUT ORDERING

It's best for TDB to order all materials for your project.

Materials ordered by your project manager are delivered to our office and securely stored, or delivered directly to your job site. Allowing TDB to order your materials offers several key benefits:

- Orders are timed according to the construction schedule; materials that are ordered too early can waste too much of their warranty periods sitting in a box.
- Materials are inspected for quality upon arrival by the appropriate contractors: in the event of a defect, TDB can leverage vendor relationships for a resolution.
- Budget tracking for your project is more reliable when your project manager supervises purchases.
- TDB can save costs on materials through contractor discounts, which are passed along to you.