

## DOCUMENT 03 // PHASE-BY-PHASE MANAGEMENT GUIDE

# Project Management Protocol

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## PHASE 01

## Before the First Meeting

- **Prepare.** Prepare a detailed budget breakdown before entering the room -- they will ask about every line item.
- **Alternatives.** Always have an alternative scenario ready. Never arrive with just one option.
- **Agenda.** Bring a printed meeting agenda and hand it to them at the start. It signals competence before you say a word.
- **Boundaries.** Define upfront which decisions are reversible and which are not -- communicate this clearly.

## PHASE 02

## Contract & Proposal

- **Scope clause.** The contract must include a change-of-scope clause with a clear fee per revision.
- **Phase sign-offs.** Every phase requires written confirmation before moving to the next -- no exceptions.
- **Revision cap.** Limit the number of revisions per phase explicitly by number, not by description.
- **Contractor protocol.** Define who contacts the contractor -- only the designer, never the client directly.

## EMAIL TEMPLATE

*Before we move to Phase [X], please confirm the following items: [list]. This is our agreed process -- work does not proceed without it.*

## PHASE 03

## During the Project

- **Weekly check-in.** Weekly check-in on the same day -- brief, structured, and documented.

- **Format.** Format: 'Here's what we've done. Here's what's next. Here's what I need from you by [date].'
- **Red flag 1.** If they start contacting the contractor directly → address it immediately, without apology.
- **Red flag 2.** If they say 'just a small tweak' → that is always a new scope item. Invoice before you start.

## PHASE 04

**Final Payment & Project Closeout**

- **Handover doc.** Handover must be documented -- a checklist the client signs.
- **Defects period.** Define the defects liability period in the contract upfront -- with exact dates.
- **Payment first.** Financial closeout before physical handover -- never the other way around.

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