

Client brief template

A clear brief before the first meeting saves time for everyone. Fill this in before the first meeting, or work through it together.

1. Project basics

Site address

Where is the project?

Ownership status

Do you currently own the site, or is the purchase still conditional?

Current use

What's on the site now: vacant land, existing house, existing commercial building?

2. Budget

Stated construction budget

What figure are you working with?

Source of that figure

Where did this number come from: a builder estimate, a quantity surveyor, a rough guess, a bank pre-approval?

Contingency

Is there flexibility above this figure, or is it a hard ceiling?

3. Timeline

Desired start date

When would you like design work to begin?

Hard deadlines

Is there a settlement date, finance-conditional date, or other fixed date that affects timing? Why does it matter?

Spaces needed

What rooms or areas does the project need to include?

Must-haves vs nice-to-haves

Which of these are non-negotiable, and which would you drop if budget got tight?

Precedents or references

Are there any projects, images, or styles you're drawn to?

5. Site constraints you're aware of

Heritage or overlay status

Do you know if the site has a heritage overlay or is in a conservation area?

Slope or known site issues

Is the site sloped, or are you aware of any flooding, contamination, or access issues?

Neighbours or boundary issues

Are there any known easements, disputes, or overlooking concerns?

6. Stakeholders

Decision-makers

Who needs to approve decisions on this project?

Other people involved

Is anyone else, family or business partners, going to have input?

7. Consultants already engaged

Surveyor, engineer, town planner, builder

Have you engaged, or started budgeting for, any of these already?

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