



Nestled Interiors

CLIENT ON BOARDING CHECKLIST

Welcome to Nestled Interiors!

We're thrilled to begin this journey with you. This checklist outlines the steps that will guide your project from proposal to installation, helping you understand what to expect at each phase. Our goal is to make the design process clear, organized, and enjoyable—so you can relax knowing every detail is handled with care and intention. This document will also be uploaded to your Client Dashboard as a checklist, in addition to your personalized timeline.

Step 1: Review & Approve Proposal

- ☐ Review your custom Design Proposal, which outlines project scope, design phases, and estimated costs.
- ☐ Sign the proposal acceptance to confirm your intent to proceed.
- ☐ Review all terms and policies regarding fees, revisions, and deliverables in your Client Contract and sign.

Step 2: Submit Retainer & Access Client Dashboard

- ☐ Pay any design retainer to secure your project start date.
- ☐ Receive access to your Client Dashboard, where you'll find:
 - Proposals, contracts, and invoices
 - Messaging and updates
 - Selection boards, renderings, and file sharing
 - Task lists and timelines

Step 3: Schedule Kickoff & Site Visit

- ☐ Schedule your follow up on-site design kickoff meeting.
- ☐ Designer will take measurements, document the space, and confirm goals and priorities.
- ☐ Discuss functional needs, desired style, and budget allocation.



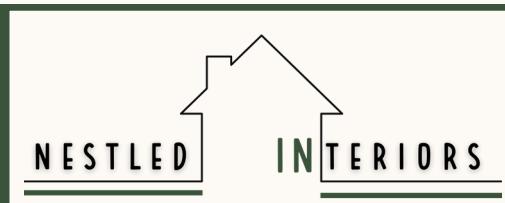
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Step 4: Share Inspiration

- ☐ Upload any photos, floor plans, or inspiration images to your Client Dashboard.
- ☐ Provide any existing finish selections or key pieces you'd like to keep.
- ☐ Schedule any in store selection meetings with Designer to review finishes

Step 5: Design Development Phase

- ☐ Designer will create selections boards, floor plans and 3D renderings for review.
- ☐ Review all materials through your Client Dashboard and provide feedback.
- ☐ Confirm final selections and any revisions before procurement begins.

Step 6: Approval & Procurement

- ☐ Approve the final design and sign off on selections.
- ☐ Designer will order, track, and manage materials and furnishings.
- ☐ Confirm delivery timelines and installation windows.

Step 7: Installation & Styling

- ☐ Designer and team coordinate installation and styling of all design elements.
- ☐ Review the completed space during your final walkthrough.
- ☐ Enjoy your transformed home!

Step 8: Wrap-Up

- ☐ Review final invoice and confirm all payments are complete.
- ☐ Receive warranty and care instructions for necessary finishes.
- ☐ Provide feedback or testimonial (optional).
- ☐ Stay connected for future seasonal updates, styling refreshes, or new projects.



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