



Nestled Interiors

CLIENT ON BOARDING CHECKLIST

Welcome to Nestled Interiors!

We're so excited to begin your Furniture & Décor Curation journey. This checklist outlines the steps that will guide your project from proposal approval through installation, helping you know what to expect along the way. Our goal is to make the process clear, organized, and enjoyable—so you can relax knowing every detail is handled with care and intention.

This checklist will also be uploaded to your Client Dashboard, where you'll find your personalized timeline, updates, and deliverables.

Step 1: Review & Approve Proposal

- ☐ Review your custom Furniture & Décor Curation Proposal, outlining the project scope, estimated furnishings budget, and service details.
- ☐ Sign the proposal acceptance to confirm your intent to proceed.
- ☐ Review and sign your Client Contract, which includes all terms, fees, and policies regarding revisions and deliverables.

Step 2: Submit Retainer & Access Client Dashboard

- ☐ Pay the required retainer to secure your project start date.
- ☐ Access your Client Dashboard, where you can find:
 - Proposals, contracts, and invoices
 - Selection boards and 3D renderings
 - Messaging, updates, and timelines
 - Shared files and room layouts

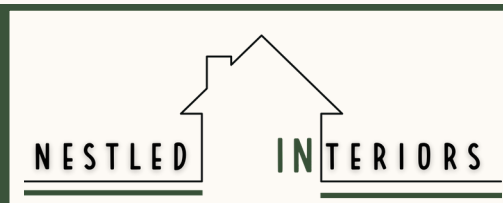
Step 3: Schedule Kickoff & Site Visit

- ☐ Schedule your on-site kickoff meeting to review your space in even greater detail.
- ☐ Designer will take measurements, assess flow, and confirm goals, preferences, and priorities.
- ☐ Discuss style direction, functionality, and target investment for furnishings and décor.

 608-215-0030

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 lyndsay@nestledinteriors.com





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Step 4: Share Inspiration

- ☐ Upload any photos, floor plans, or inspiration images to your Client Dashboard.
- ☐ Identify any existing furnishings or pieces you'd like to incorporate.
- ☐ Schedule any in-store selection meetings if applicable for finishes or materials.

Step 5: Design Development Phase

- ☐ Designer creates selection boards, floor plans, and 3D renderings for review.
- ☐ Review all design concepts through your Client Dashboard and provide feedback.
- ☐ Confirm final selections and any requested revisions before procurement begins.

Step 6: Approval & Procurement

- ☐ Approve the finalized selections and sign off on the design direction.
- ☐ Designer orders, tracks, and manages furnishings and décor purchases.
- ☐ Confirm delivery windows and installation timelines.

Step 7: Installation & Styling

- ☐ Designer and team coordinate all deliveries, placement, and styling.
- ☐ Review the completed spaces during your final walkthrough.
- ☐ Enjoy your beautifully furnished and curated home!

Step 8: Wrap-Up & Next Steps

- ☐ Review the final invoice and confirm payment completion.
- ☐ Receive care instructions and warranty information for purchased items (if applicable).
- ☐ Provide optional feedback or testimonial to help others discover Nestled Interiors.
- ☐ Stay connected for future styling refreshes or seasonal updates.



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