



Landscape and home architecture, design, construction

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Page 1 of 6

1st Design Meeting Notes and Worksheet

Hi. It's always great to meet new people!

Please print this as a worksheet to take notes on as you read it. You will have me with you and I'm willing to help with anything I can while I'm there so please make me work for you – I'll do my best with anything. If we both do some advance work, it will make the whole process smoother and we'll miss less. I'll get properly oriented to your property and project more quickly.

I like to make the most of our time together. We'll need up to 3 hours of clear time to focus on our work. Please arrange for help with children and clear your calendar. If you have any designs for the house or surveys of the property it could be helpful. If not – don't be concerned - we'll make the arrangements if we need anything.

This is the time for "Blue Sky" conversation: "What if time and money allowed the ideal build-out of everything you might want?" Let's see what your fantasies look like and then see what we can make real. I like to solve the short-term priorities with an eye to the ultimate goals so no time or money is wasted or opportunities are lost as we work along in phases.

Don't eliminate things you don't think you can have but may want. For example, you can now put a swimming pool spa in a deck and there's no heavy chlorine or chemicals involved! Easier maintenance. Wonderful new stuff becoming available all the time.

Please make checklists and notes: (print one copy for each of you – you may be surprised at different priorities that I may be able to resolve for you)

Don't self-filter because you don't think a problem can be solved. I may have a solution. Be critical of your comfort, convenience and safety.

1. Any problems you're aware of
 - Lack of privacy (especially in winter) is usually an issue. Worst angles for you? Most important issues? We'll discuss fences vs. hedges of evergreens pros/cons.
 - Too much sun (or shade) in various areas (like glare coming in the back windows or heat on the back of the house).
 - Drainage or erosion issues
 - Poor driveway layout, lack of guest parking, no turnarounds, etc.



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Page 2 of 6

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- Pet security and debris disposal/control.
 - Deer and/or rabbits eating your plantings
 - Water issues/puddling anywhere on the property (or your basement).
2. Any things you need that you don't have
- An upgraded back deck and/or patio
 - How much will you use this deck for entertaining and family?
 - Storage for recreational or maintenance items
 - Fence for dog enclosure, very young children, etc.
 - Future in-ground swimming pool
 - Future cabana for overnight guests and/or entertaining
 - Plunge pool or hot tub/spa.
 - Vegetable and/or herb garden (we can build low maintenance raised gardens and planters for you)
 - Outdoor kitchen or spaces for entertaining larger groups friends/family/colleagues
3. Anything you've always wanted but haven't had the right place for
- Lilacs
 - Fragrance garden
 - Cutting garden
 - Potting bench (to keep the mess outside)
 - Bench swing for adults
 - Play sets
 - Outdoor shower
4. What is the ideal outdoor living setup for your desired lifestyle at this house? Entertaining priority? Morning "tea walks" to see the new flowers? Meditation/Zen peace times? Cocktail hour? Barbeques? Rolling in the grass with kids or pets? Sunday morning coffees? Outdoor office time? Sports event gatherings with outdoor video? Evening meals with friends? Entertaining larger groups in the summer (or winter)?



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Page 3 of 6

5. Any hints for me on styles of landscapes you've seen that you liked (or hated). We do "architectural/stark/spare/modern/open" to many types of traditional garden styles (Asian, American or European)/fusion.
6. What makes your landscape uncomfortable (and where?).
- Lack of privacy
 - Too hot and sunny
 - Too shady and cool
 - Too buggy; mosquitos or other insects
 - Too wet
 - Too dark, damp and/or cool
 - Too sunny and/or hot (in different areas)
 - Difficulty getting onto the street safely from your driveway
 - Parking
 - i. Off-street for snow clearing overnight in the winter
 - ii. Parking for family visits and parties
 - iii. Would you like a garage (or more storage space)?
 - Access to your front door from your guest parking. Is it comfortable. Do you have a roomy entryway? Would you like a portico overhang or vestibule addition for better protection and greeting of guests?
 - Tick concerns
 - Other problems not touched on to this point:



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7. I'll want each of you to give me your three worst problems you have with this property; things you live with but really don't like. They aren't the same for each of you. I need to know what problems I need to solve to be successful for you.

_____:

1.

2.

3.

_____:

1.

2.

3.

Short-term top priorities



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Page 5 of 6

- Long-term ultimate goals

Budgeting:

We don't have any crews to keep working or materials to sell you. We know where to get the best value on anything we're buying for you. We also have innovative ideas that can be simpler and more effective for the least investment. Our first goal is to understand what options you want to consider in the design, then get some idea of "scope of work" and final budget options for the first phase (in that order).

We may begin the scope of work and budget discussion with you if it comes up in the first conversation. I can't know what any prices will be the first day, of course, but I will know relative prices (what's more or less pricy and where we can economize). I'll get a sense from you for where we should be and work to get it right. I've worked on projects in phases for up to 20 years, starting when the kids are young and then setting the yard up for weddings and showers; no kidding! I love what I do and I'll be around for a long time, so I won't rush you and I'll be ready when you are for the next phase. We may want to see some of the work that I've done together and I'll introduce you to past clients.

All successful project planning is based on the three Ds.:

1. Design. Form follows function. What will the landscape do for you functionally? Aesthetics is a function.
2. Date. When does this need to happen to give you the benefit you need most? When is the best time of year to do the work?
3. Dollars. What does your immediate and long-term cash-flow allow?

Nothing is real until these three questions are answered. I lead my group because I'm good at finding the right fusion of answers and balance for people. I develop a vision and path to success through multiple important constraints all at once. It's a design "gestalt". It's very different for everyone and doesn't depend so much on your property as it does on you. I will find (or make) solutions and opportunities for you.



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Page 6 of 6

Once I've talked with you and situated myself with your goals in mind, we'll walk around and share ideas about what we need for problem solving and design development. I want to collaborate with you and listen to your ideas and preferences (if any). Don't worry, though, I'll have lots of ideas that we can sort through. I'll have options to discuss. Each of our designs is custom and unique but has an integrated finish and a consistent look and feel.

Next steps: we'll set a time frame meet and review the concept options, I'll get your feedback and we'll work to establish a goal in a series of iterations, mixing and matching pieces of each as needed. We work with drawings and full color photo posters for your project on 2'x3' boards. You'll see a sample of one (folded) with an explanation of our process in the package that I sent you.

Finally, we'll gather prices for options you want to consider and price Phase 1 work for you (through various contractors). Construction. We hire people, schedule, source materials, set up, inspect, guide, supervise, verify insurances, back up guarantees for you, and (most of all) provide communication and coordination of everything. You'll have one person working with you for all phases of the construction.

All of this is detail and it isn't necessary that anything be done before I come over, but if you tackle this it will make the process smoother. I've been doing this since '82 so I know how to lead the conversation most expeditiously. I am very respectful of your time. I look forward to meeting you both in person.

With my best regards. I'm very happy to be helping you with your project.

Best regards to you both!

~ Mike