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DESIGN .efficiently

More Design, Less Admin.

It's time for a design process revolution.

BY STEVE TAYLOR - FOUNDER

The truth is, your process is fine.

It's your tools that are failing you!

Not because your team lacks vision—
but because the tools you're using
can't clearly communicate design
intent to the people who need it most.

Design teams imagine beautiful spaces, curate materials, and shape environments where people live, work, and gather. But the moment that vision needs to be handed off—whether to a client for approval or to a builder for execution—it gets buried in spreadsheets, static PDFs, disconnected apps, and endless back-and-forth.

That's where things break down.
It's not just frustrating; it's expensive.

Every hour spent chasing missing information, reformatting presentations, or answering RFIs is money lost. The real cost of broken tools isn't just inefficiency—it's delay, confusion, and rework in the field. And when time is your most valuable asset, that inefficiency adds up fast.

It's not the design that's broken. It's the system responsible for delivering that design with clarity and precision.

This e-book is about identifying the tools costing you time and money —and showing you a better way to communicate design intent from concept to construction.

The Design Administration Process: Where It Breaks Down

Design administration isn't one task—it's an entire set of operational responsibilities that support the creative process and ensure it is executed properly. However, it's in these specific areas that the industry's workflows have become inefficient and broken.

The core phases of design administration typically are as follows:

01 **Item Selection**

Turning creative vision into reality by selecting tangible products, sourced from manufacturer websites, showrooms, and supplier catalogs.

02 **Client Presentation**

Translating creative selections into clear, client-ready presentations that effectively communicate design intent.

03 **Item Schedule Management**

Building a structured, detailed schedule of all selected items and their specifications to communicate with contractors and project stakeholders.

04 **Client Approval Process**

Capturing and confirming client approvals, both for the specific product selections and their placement within the project.

05 **Change Management & Version Control**

Maintaining accuracy and clarity when products change, clients provide feedback, or construction teams request clarification.

Every phase in this process carries hidden inefficiencies. Each one introduces friction, consumes time, and increases the risk of miscommunication and mistakes.

It's time to take a clear, comprehensive look at where the design process breaks down—and what you can do to fix it.

1. Item Selection

Rethinking Item Selection: From Inspiration to Execution

The design process always starts with a spark of inspiration, but inspiration alone isn't enough. When a designer finds a product they love, whether it be on a supplier website, showroom floor, or even Pinterest, the process should be simple: capture it once, enrich it over time, and use it seamlessly throughout the life of the project.

But today's reality is very different.

We clip an image. Save a product name. Maybe jot down a finish. Then weeks later, we're digging through email threads and screenshots, trying to track down the product link or re-download the tech sheet. It's an inefficient and outdated process—one that forces design teams to do the same work several times over.

THE ITEM ITSELF ISN'T THE PROBLEM.

THE PROBLEM IS THAT WE DON'T STORE IT IN A STRUCTURED, SEARCHABLE WAY THAT EVOLVES WITH THE PROJECT.

2. The Lifecycle of an Item: A Three-Stage Journey

In any design workflow, every item has its own lifecycle—from the first spark of inspiration to the final installation. Understanding the three stages of this journey is key to streamlining your process, reducing rework, and delivering with confidence.

1. Initial Discovery and Client Presentation

At this stage, it's all about the visual. You find an item that perfectly communicates the look and feel of a concept, and all you need is an **image** and a **name**. For now, it's simply about showing the client a clear direction.

2. Room-by-Room Specification

Once the concept is approved, that same item needs context. Design teams will often add some further details to the image in the client presentation, such as the manufacturer item name, finish, often the SKU, and potentially other valuable information for the client. But here's the catch: this step usually means digging back through files to find information that was already sourced and manually adding it all to the client presentation.

3. Construction & Procurement Documentation

This is where the stakes get high. Ideally, the item must now be fully documented, including technical sheets, care and installation instructions, supplier links, and final specification details. Yet, this information often needs to be sourced again or is lost entirely. Decisions here affect budgets, schedules, and installation on-site.

Each stage builds on the last. But without a structured system, designers are forced to search for information buried in files, shared drives, emails, and saved browser tabs. Not to mention, you are wasting valuable time transferring information manually between client and construction presentations.

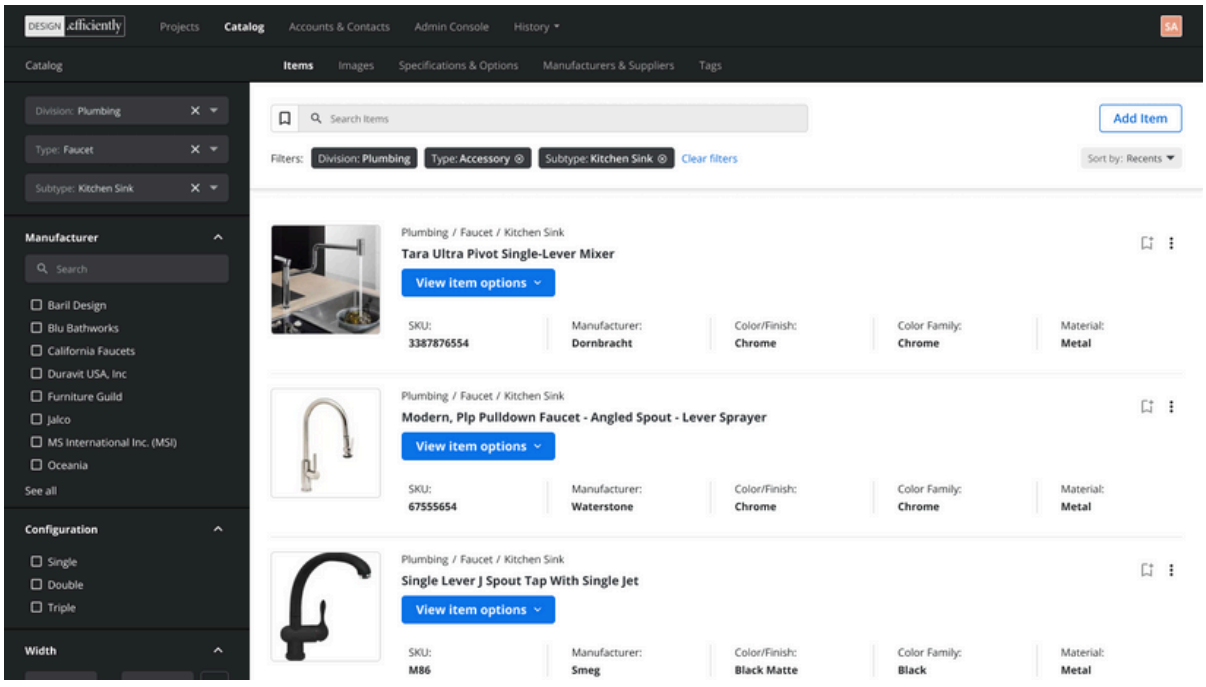
There's a better way—one where each stage flows into the next, and the information you need is right where you need it.

3. What Every Item Needs

A complete item record is more than just a photo and a few scattered notes—it's a vital part of your project. Capturing all the facts at the right time doesn't just keep things organized—it reduces questions, prevents costly mistakes, and saves hours of rework down the line.

Here's what every item should evolve to include:

IMAGE	Clean, high-quality, and ideally the background is removed
ITEM NAME	An accurate manufacturer issued item name
ATTRIBUTES	Dimensions, finish, item specifications, etc.
TECHNICAL DOCUMENTATION	Care instructions, install guides, tech documentation
SUPPLIER OR SOURCE LINK	A direct path back to where the item was found or can be procured



4. Why Item Details Matter

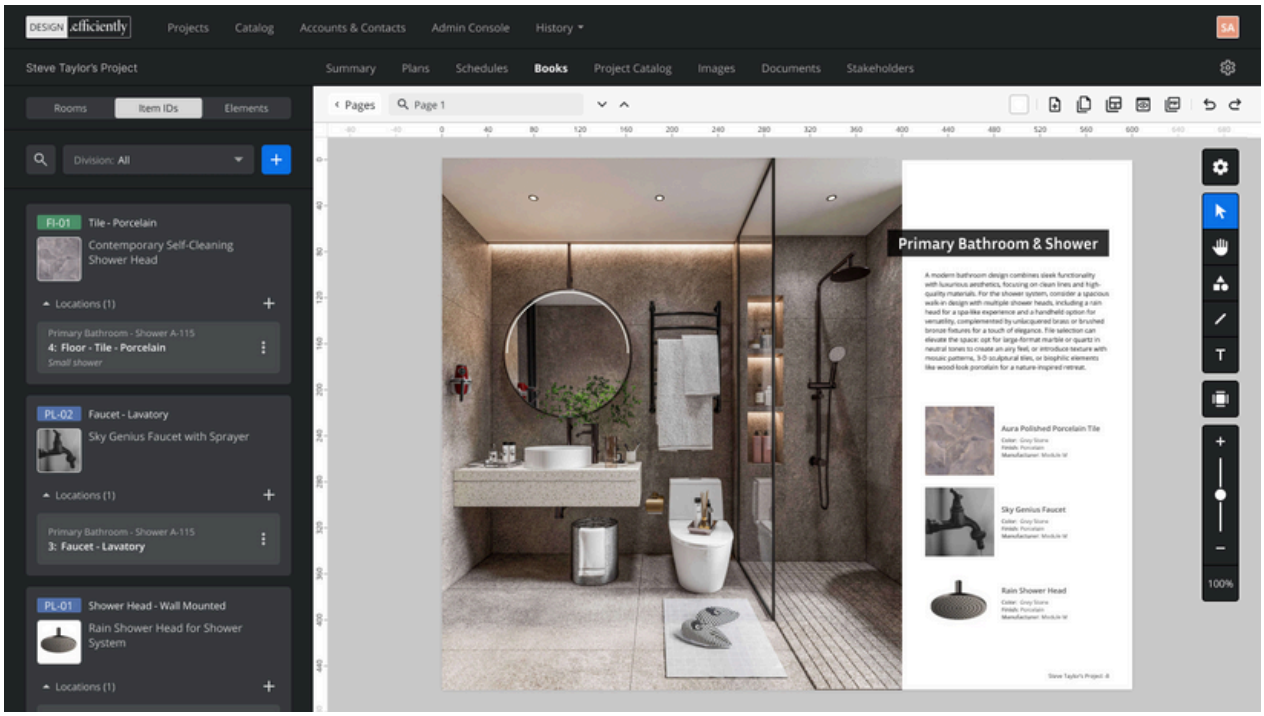
The consequences of poor item management ripple throughout the project:

- **Time lost redoing work that should have been saved properly the first time**
- **Errors with incorrect item information, particularly the SKU**
- **Delayed construction due to missing documents or unclear specifications**

In a world where time is money and clarity is everything, design teams need more than screenshots, spreadsheets, and links to Dropbox. They need an easy-to-use but powerful catalog management system—one that stores product information accurately and allows them to drag and drop that data directly into both client and construction deliverables.

And the ideal system? It wouldn't just capture items efficiently—it would start with a rich, structured catalogue already preloaded with millions of commonly used products, so design teams can skip the manual entry altogether and focus on design.

That's how you eliminate busywork.



5. Creating Client Presentations that Work

Once you have selected your items—carefully curated products gathered from manufacturer websites and showroom visits, complete with specifications and images—the next critical phase is creating an **effective client presentation.**

Your presentation isn't simply about showcasing attractive products. It's a critical communication tool designed to clearly convey design intent, ensuring clients fully understand and embrace the selections that have been collaboratively made.

Yet, the creation of client presentations remains one of the most manual, frustrating, and time-consuming parts of the modern design process. And it shouldn't be.

Administrative Heavy-Lifting Disguised as "Creative Output"

Design teams are routinely expected to transform their carefully chosen creative selections into polished, client-facing documents using general-purpose tools such as **Adobe InDesign, PowerPoint, or Canva—tools never built for the operational realities of the design industry.**

Each presentation becomes a laborious exercise in content assembly, filled with repetitive, manual tasks:

- Sourcing images from manufacturer websites, often low-resolution, inconsistent, or incompatible with professional layouts.
- Removing backgrounds manually to ensure visuals appear clean, consistent, and professional.
- Resizing, cropping, and aligning images repeatedly to produce aesthetically cohesive documents.
- Copying and pasting product information, specifications, and attributes into static text boxes, risking errors with every entry.
- Manually updating pages and managing document versions every time a product selection changes or client feedback is received.

None of this is genuine design work. It's purely administrative—low-value, repetitive tasks that consume hours of highly skilled, highly paid design professionals' time. This manual process also inevitably leads to human error, introduces unnecessary delays, and diverts valuable resources away from meaningful design tasks.

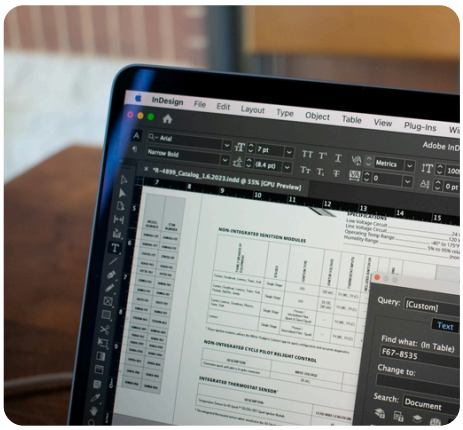
The end result? A static, flattened PDF—an outdated, inflexible document disconnected from the real-time, technical product data that construction teams depend on downstream.

In time, as changes are made, the actual project is never reflected in the book.

6. The Limitations of Traditional Tools

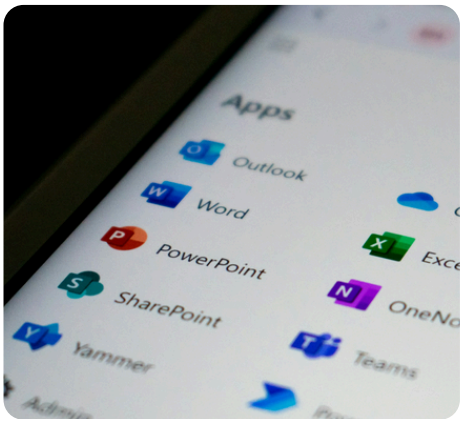
Adobe InDesign: A powerful, yet overly complex graphic design tool. Adobe InDesign excels at creating visually attractive presentations, but at significant administrative overhead:

- Steep learning curve: Designers invest countless hours mastering layout complexities rather than focusing on creative design.
- Manual updates: Each product change triggers labor-intensive, manual revisions.
- Disconnected from product data: No direct integration with product catalogs, forcing manual entry and updates.



PowerPoint: Quick, but shallow and disconnected from everything in your workflow. PowerPoint's ease of use is overshadowed by its limitations in sophisticated design:

- Limited design flexibility: Presentations often look amateurish, diminishing client trust.
- Manual data entry: Constantly re-entering data increases inaccuracies.
- Poor scalability: Complex projects quickly overwhelm PowerPoint's basic functionality.



Canva: Accessible, but not built for design complexity. While Canva is user-friendly, it fails to handle complex design specifics:

- Limited product depth: Minimal capability for handling detailed specifications and technical information.
- Repetitive manual tasks: Product updates must be manually repeated throughout multiple documents.
- Static and disconnected: No dynamic updating capabilities, causing inconsistencies and outdated information.

7. Client Presentations are Brand Builders, Not Admin Tasks

The client presentation is more than just a document—it's your brand, your professionalism, and your creative vision all rolled into one. It's how you communicate trust, clarity, and confidence.

Yet despite its importance, creating a client presentation book remains one of the most time-consuming and arduous tasks in the design workflow. Designers are forced to cobble these books together with tools that were never built for the job—spending hours resizing images, retyping specs, and managing version control.

This isn't creative work. It's administrative overhead in disguise.

The truth is: Your client presentation should be stunning, simple, and seamless to build.

What the Ideal System Should Deliver:

Option 1

Auto-Generated, On-Brand Books

In minutes, generate a beautiful, structured client presentation based on your room-by-room item selections. Perfectly formatted. Professionally branded. Zero effort. Ideal for fast-moving teams or early-phase client reviews.

Option 2

Manual Control, Without the Manual Labor

Need something custom? Start from a professionally designed template, then drag and drop your items directly into layout-ready pages. Want to swap out a product? Done. All item details update automatically across the book. What once took days now takes hours.

THE BIG IDEA: STUNNING PRESENTATIONS SHOULDN'T COME AT THE COST OF YOUR TEAM'S TIME.

THE BEST PLATFORMS DO BOTH: AUTOMATE THE REPEATABLE AND EMPOWER THE CREATIVE. THAT'S HOW YOU IMPRESS CLIENTS!

7. Item Schedule Management Spreadsheets Aren't Built for It

Part of the design administration process isn't just about selecting materials or organizing product information—it's about communicating design intent to the construction team. That's where the process becomes even more fragile.

Traditionally, the industry has relied on Microsoft Excel to communicate this critical information, all formatted in endless rows, columns, and different sheets for each division.

These spreadsheets are sent downstream to construction teams, installers, and procurement teams with the expectation that they will accurately interpret a designer's creative vision from a series of cells and codes.

The truth is spreadsheets were never designed to communicate design intent.

Why Spreadsheets Fall Short

Design teams aren't just managing line items and SKU codes. They're managing a massive amount of layered content, including:

- **Product images**
- **Supplier information**
- **Finish details**
- **Installation instructions**
- **Technical documentation**
- **Manufacturer links**
- **Location-specific details**
- **Version changes**

None of this translates well into a spreadsheet. Even worse, spreadsheets strip away the visual and spatial context of design intent. They struggle to capture all the information required.

The result? Questions, errors, misinterpretation, rework, and costly delays.

LET'S BE HONEST: EXCEL IS A FANTASTIC TOOL... FOR MANY USES. BUT WHEN IT COMES TO THE COMPLEXITY AND RICHNESS OF DESIGN, IT SIMPLY DOESN'T HAVE THE MUSCLE OR FLEXIBILITY TO CARRY THE LOAD.

8. How Spreadsheets Become a Roadblock to Efficiency

The deeper you get into a design project, the more complex and interdependent the decisions become. But spreadsheets are static, rigid, and linear—completely out of sync with how design actually works. The more complexity increases, the more painful their limitations become.

1 Static Data vs. Dynamic Design

Design is fluid. Product specs change, finishes evolve, and clients adjust selections. Spreadsheets can't keep up—every change requires a manual update, increasing risk with each edit.

2 Inability to Handle Rich Content

Design is visual. But Excel makes it hard to store images, CAD files, and spec sheets. Links break, visuals get lost, and without context, mistakes happen.

3 No Single Source of Truth

Multiple versions get passed around. Designers, builders, and clients often work from different files, each with conflicting or outdated information.

4 Limited Collaboration

Spreadsheets are rarely shared live. Teams email back and forth, creating silos and delays. The lack of real-time access slows progress and clouds accountability.

5 Messy Version Control

Tracking changes is hard. There's no history, no clarity on who edited what or why. Trust breaks down—and so does efficiency.

6 Incomplete Documentation

Key installation details often get buried in long text cells or lost entirely. Without clear, structured documentation, builders are left guessing.

7 Not built for the field

Spreadsheets don't work well on phones or tablets. That's a problem when field teams need quick answers on-site.

9. The Perfect Item Schedule: Clarity in the What and the Where

Spreadsheets weren't built for design, but what is the right solution? The perfect item schedule doesn't just organize product selections. It clearly communicates what is being installed and where it's going – with all the detail needed to execute the design correctly on-site. This is what we call the "what and the where." It's simple, but it changes everything.

The What: Complete Product Detail

Every selected item should carry a complete, structured profile:

- **Image:** Clean, high-res, and background-removed
- **Item Name**: Accurate manufacturer-issued name
- **Attributes:** Dimensions, finish, color, material, flow rate, voltage
- **Technical Documentation:** Install guides, care instructions, tech sheets
- **Supplier Info:** Manufacturer name, purchasing link, lead times
- **Sorted by Installer:** Organized by division and trade for downstream clarity

The Where: Exact Location Specifications

Without clear installation details, the design intent breaks down. Construction teams are forced to guess—and when they guess wrong, you lose time, money, and trust. That's why specifying the "where" matters so much:

- **Precise location:** Where the product goes in the room
- **Tile layout:** Pattern, direction, grout width, starting point
- **Mounting details:** Height, alignment, orientation
- **Room and space definition:** Clearly labeled with Room → Space → Location structure

The Real Job of the Item Schedule

It's not just a list of selections - it's the bridge between design and construction.
And the true test of any schedule - or any platform that creates it - is this:

Can it deliver your design intent - clearly, completely, and accurately - to the construction team?

If it can't, then you're not just dealing with inefficiency. You're risking miscommunication, costly rework, and a final build that doesn't match the vision. The better the schedule communicates the what and the where, the smoother every downstream handoff becomes.

That's how you reduce RFIs.

10. Client Approval Process

Client approval often happens before the detailed item schedule is complete.
The timing depends on what level of information the design team needs approval for.
Ideally, you're not just getting sign-off on the item itself, but also where it's going.

It's about securing client sign-off on the exact items, finishes, and materials that will be used—and crucially, confirming the specific details and placement of those selections.

It sounds simple. **But in reality, it's one of the most fragmented and poorly documented steps in the entire design process.**

Client Approval vs. Construction Sign-Off: Clarifying the Difference

Before discussing the challenges within the client approval process itself, it's essential to distinguish clearly between two closely related—but fundamentally distinct—steps:

Client Approval

This is the process of having the client approve the item selection and location, ready for submission to the construction team.

The construction team would then take that item schedule, and move it into the bid phase, where the General Contractor sends the approved client selection list to the individual contractor teams to provide cost estimates or bids.

Construction Sign-Off

Construction sign-off happens after client approvals. This incredibly important phase is when the client signs off on these items as part of a contract with the General Contractor.

This happens after all bids are received, the General Contractor has provided costs, and enters into a contract.

Both steps are crucial, yet they serve different purposes and involve different conversations, stakeholders, and documentation requirements.

11. What a Real Client Approval System Should Look Like

If we want fewer errors, faster decisions, and better builds, we can't treat client approval like an informal conversation. It must be a structured, trackable process—designed with the same clarity and discipline as the item schedule itself.

1. Centralized

All approvals are stored in one place—not scattered across email threads, text messages, PDFs, and marked-up printouts.

2. Transparent

Everyone knows who approved what and when. No ambiguity, no guesswork, no need to dig through old meeting notes or "he said, she said" chains.

3. Specific

Clients aren't just saying "yes" to a faucet—they're signing off on the exact model, finish, and where it will be installed. Every item has clear context.

4. Flexible but accountable

As designs evolve, the system should track changes and version history—so teams are always working from the latest approved information.

Why it Matters

A clear and structured client approval process is essential to avoid costly breakdowns in communication between design, client, and construction teams.

Here's who it protects:

- **Design Teams** – Avoid costly errors and rework by locking in exactly what was approved—no ambiguity, no assumptions.
- **Clients** – Stay fully informed and confident, knowing what's been selected, where it goes, and what they've signed off on.
- **Builders** – Bid accurately and build confidently with a documented record of selections and specifications tied directly to location.

The Bottom Line

A strong approval system ensures that what was discussed is what gets built. No confusion. No surprises. No costly rework.

The quality of a project doesn't just depend on design decisions – it depends on how clearly those decisions are approved and communicated.

12. Change Management: Maintaining Control Once the Project Starts

The design process, as detailed in previous chapters, was already a fragmented and often inefficient effort—marked by scattered product selections, inconsistent documentation, and a constant back-and-forth between designers, clients, and suppliers. But once the project moves beyond the design and planning phases and enters construction and implementation, the complexity multiplies.

What was already a difficult and disjointed process now becomes an extremely challenging, high-stakes operational exercise.

The vision has been defined, products selected, and design direction approved—but now comes the hard part: executing that vision in the field, in real time, with precision, accountability, and formal oversight.

The Coordination Challenge: Too Many Moving Parts

In the construction phase, changes are no longer conceptual—they are logistical and contractual.

Each change introduces complexity, involving:

- Multiple decision-makers: Designers, clients, PMs, GCs, contractors, suppliers.
- Formal documentation: Change orders, updated plans, revised product selections.
- Schedule impacts: Adjusted lead times, trade schedules, installation sequences.
- Budget implications: Cost increases, labor adjustments.

The challenge is not simply the volume of changes—it's the fragmentation of communication and decision-making across emails, meetings, text messages, verbal conversations, and spreadsheets. Without clear systems and accountability, even small changes can lead to delays, confusion, and financial exposure.

13. The Risk: Chaos Without Control

Many projects struggle with change management because:

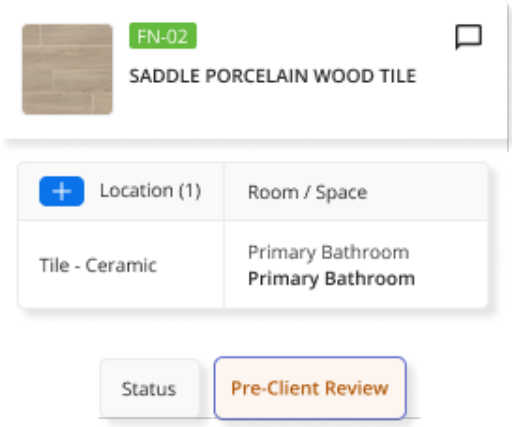
- There is no centralized system to track and document all change requests.
- Approvals from PMs, GCs, or clients often occur informally and are easily forgotten.
- Contractors may proceed without full approval, leading to rework and additional costs.
- Designers and clients lose visibility into which changes were approved or implemented.
- The cumulative impact of dozens of small changes is not fully understood until budgets and timelines are already compromised.

The Need for a Formal, Streamlined Process

At this point in the project lifecycle, the need for a formalized, transparent, and disciplined change management process becomes essential.

A well-structured system should:

- Document every change request, regardless of size.
- Define clear approval protocols—who approves, when, and how.
- Track the downstream impact of each change on budget, timeline, procurement, and design intent.
- Provide a shared communication platform where all stakeholders can view, comment on, and approve changes.
- Maintain a clear, auditable record of decisions to prevent disputes.



14. The Ideal Design Process Platform: What It Should Do

Having exposed the inefficiencies and breakdowns in the current design administration workflow, the question naturally follows:

- What would a better system look like?
- What would it take to remove the chaos, streamline collaboration, and restore creative focus to the design process?

The answer is not a patchwork of disconnected tools, manual spreadsheets, emails, and static PDFs.

THE INDUSTRY NEEDS AN INTEGRATED DESIGN PROCESS PLATFORM, 'A SINGLE SOURCE OF TRUTH', A PURPOSE-BUILT, COLLABORATIVE, DIGITAL ECOSYSTEM THAT ADDRESSES EVERY ADMINISTRATIVE PAIN POINT.

Core Capabilities of an Ideal Platform

Here's what a truly effective Design Process Platform would deliver:

1. Centralized Product Information Management

- A single, searchable source for all product images, specifications, brochures, supplier links, showroom notes, and estimates.
- Ability to store both web-sourced products and showroom-sourced materials (PDFs, quotes, samples).
- Able to store, inspirational images and architectural specification images.
- Eliminate the need to revisit manufacturer websites, emails, or physical paperwork to retrieve product information.

2. Integrated Item Schedule Generator

- Direct link between product selections and item schedules.
- Dynamic, structured item schedules auto-generated from approved product data.
- Visual product references embedded within the schedule, preserving design intent.
- Single source of truth — eliminating the need for scattered Excel files and manual version control.
- Information rich, with every detail required by all stakeholders
- History and version control.

3. Robust Change Management System

- Dedicated module to capture, track, and document every change request.
- Automated impact analysis showing cost, timeline, and procurement effects.
- Clear approval paths with digital sign-off from clients, PMs, and GCs.
- Transparent communication to all stakeholders — eliminating informal approvals and misinterpretations.

4. Dynamic Client Presentation Builder

- Automated presentation creation, pulling directly from the centralized product database.
- Real-time product updates reflected immediately in client-facing presentations.
- Elimination of manual image sourcing, background removal, resizing, and copy-pasting.
- Interactive, digital presentations — not static PDFs — that can evolve as projects progress.

5. Streamlined Client Approval Process

- A formal, digital approval workflow that captures: Product images, specifications, and placement information.
- Client comments and change requests.
- Digital sign-offs with clear timestamps.
- A centralized approval history log to avoid ambiguity and future disputes.

6. Real-Time Collaboration & Communication

- Shared access for designers, clients, project managers, contractors, and suppliers.
- Ability to collaborate on product selections, approvals, and schedule changes in one platform.
- Reduction of email threads, fragmented notes, and missed conversations.

7. Mobile-First Access

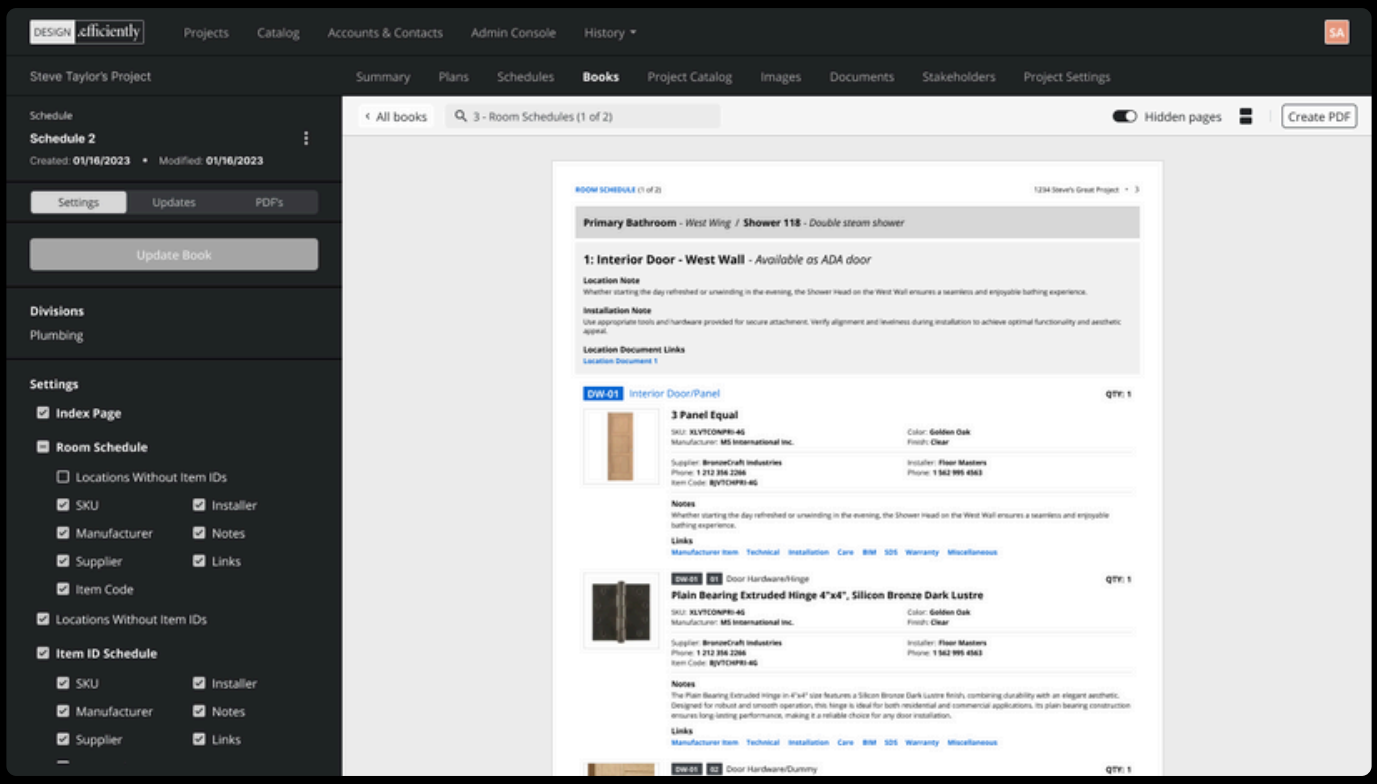
- On-site and on-the-go access for contractors, installers, and field teams.
- Easy retrieval of up-to-date product information, approvals, and change orders.
- No more dependency on printed schedules or offline spreadsheets.

The Outcome: A Streamlined, Transparent, and Client-Centric Process.

With the right platform in place, the design & construction administration process would finally align with the creativity and professionalism of the design itself.

The benefits would be immediate and far-reaching:

- Reduced administrative overhead
- Fewer errors and miscommunications
- Faster project timelines
- Improved client experience and confidence
- Stronger collaboration across all stakeholders
- More time for designers to focus on creativity, not admin



Conclusion: The Future of Design Administration is Here

The Vision Is Real—And It's Working.

Everything we've discussed in this e-book is real.

We've seen firsthand how inefficiency, miscommunication, and scattered systems create chaos, anxiety, and costly project delays. As the owner of a high-end construction supply business, I've been at the forefront of this industry, working with interior designers, general contractors, developers, and showrooms for more than a decade.

And I've watched too many teams struggle under the weight of disconnected tools, manual processes, and reactive workflows.

That's why we built Design.efficiently – a complete, collaborative platform designed to solve the problems outlined in these pages.

Today, the platform is live. It's being used by real teams across the industry. And the vision we set out to build is starting to come to life.

We're not done—far from it.
But we're proud of how far we've come.

And we're excited to keep building the future of design administration—together.

The Process Guy

Steve Taylor
Founder and CEO

More Design, Less Admin.

Visit designefficiently.com

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