

Customer Project Form



- Look through design magazines and clip pictures of styles, fixtures and looks you like. Bring these to the meeting.
- Come up with a preliminary budget for the project. If necessary, contact your builder/plumber to determine the impact of going over budget on upgrades.
Budget: \$ _____
- Bring your plans or blueprints to the meeting.
- Bring samples of colors, wall paper, tile/stone, countertop materials, paint chips and any other items you want to match.
- Note any special requirements you have (*for example, if you have someone very tall in your household, you may require a large bathtub*).
- Visit plumbing manufacturer websites, including Kohler.com, to get a sense of current styles and narrow down your style preferences.
- Is this new construction or remodel? _____
- Who is buying the product? _____
- What is your project start date? _____

Make a list of people you are working with on the project, including the builder, plumber, contractor, etc.

NAME	TITLE	COMPANY NAME	PHONE NUMBER
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

For delivery:

NAME	PHONE NUMBER	ADDRESS (STREET, CITY, ZIP)
_____	_____	_____

Create a list of your “must haves” and “nice to haves”

MUST HAVES	NICE TO HAVES
_____	_____
_____	_____
_____	_____
_____	_____

Additional notes:

In order to provide you the best possible service, we encourage you to call for an appointment.

AGENDA

Meeting Name: _____

Customer's Name: _____

Meeting Date: _____

Meeting Time: _____

Section #	Topic	Topic Leader	Follow-up/Action Items
1.	Introduction (if applicable)		
2.	Project(s) Overview/Recap		
3.	Next Steps		
4.	Questions		

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