Sandra Jessica Interiors

Project Management Cheat Sheet for Interior Designers

1.SOFTWARE CATEGORIES

PROCUREMENT SOFTWARE

Essential for accounting, invoicing, tracking spending, profit, and expenses. Below are popular options with brief details:

1. Studio Designer & Mydoma
   - Starts at $64/month (No free trial, but demo available)
   - Combines creative tools, project management, client interaction, and financial tracking
2. Honeybook
   - Starts at $19/month (7-day free trial)
   - Designed to streamline operations and enhance client interaction
3. Design Files
   - $49/month (e-design) or $69/month (full-service)
   - Offers features to streamline the design process and client management
4. Programa
   - Starts at $59/month (7-day free trial)
   - Combines design, project management, and client collaboration
5. Design Manager
   - Starts at $79/month (30-day free trial)
   - Built for growing interior design teams
6. Ivy by Houzz
   - Starts at $55/month (custom pricing available)
   - Business management for designers
7. QuickBooks
   - Starts at $35/month
   - Accounting, expense management, and payments
8. Dubsado
   - Starts at $20/month
   - A business management software for everyone
9. Xero
   - Starts at $20/mo
   - Accounting software for small businesses and sole traders

2.SOFTWARE CATEGORIES
CLOUD-BASED SOFTWARE

Perfect for accessing documents and jotting down notes while on the move.

Here are four options:

1. Dropbox

   - Starts at $11.99/month (monthly/annual plans available).

2. Google Drive

   - Starts at $6/month per user (4 plan options). Easy to use.

3. OneDrive

   - Free for individuals. Paired with Microsoft 365.

4. pCloud

   - Offers annual and lifetime plans.

3.FOLDER CATEGORIES
INTERNAL FOLDER STRUCTURE

<u>Inquiry Process</u>
- Discovery call notes
- Consultation notes
- "What to Expect" guide

<u>Proposal</u>
- Agreement

<u>Client Onboarding</u>
- Welcome guide
- Design questionnaire

<u>Design Development</u>
1. Measurements + Planning
   - Measurements and kickoff meeting notes
2. Schematic Design
   - Inspiration images, mood boards
3. Design Development
   - Budget, presentations, elevations, floor plans, quotes, SketchUp files, renderings

<u>Project Management</u>
- Procurement: Receipts, quotes
- Construction Documentation: GC drawings/specifications
- Construction Admin: Install packets, packing list, punch list

<u>Client Offboarding</u>
- Client closing guide
- Internal post-project survey
- Client feedback

<u>Accounting</u>
- Invoices

<u>Archive</u>

<u>Shared client folder</u>
- Admin
  - Agreement/contracts
- Before photos
- Drawings
  - Floor plans (not to scale)
- Specifications
  - selections pages (no descriptions or links)

MY THOUGHTS

To wrap it up, all the software options out there are pretty similar, but each has its own unique features. Some have mobile apps, some don't. Some include design tools, others don't—it really just depends.

At the end of the day, everyone in this industry works differently, so there's no "right" or "wrong" choice. It all comes down to what works for you and how your business is set up. My advice? Write down what tools or features you really need or think could make your process smoother. And don't stress about what other people are doing—what works for them might not work for you, and that's totally fine.

Hopefully, this gives you a better idea of what to look for when it comes to project management for interior design.

All the best,

sandra chavez