

WRENFIELD PEDIATRICS · SUITE 210 MOVE-IN · MON NOV 16

Eleven vendors, one move date.

VENDOR FOLLOW-UP BOARD · BALLANTYNE · CHARLOTTE, NORTH CAROLINA

46
DAYS TO MOVE-IN

11
VENDORS, EACH WITH AN OWNER AND A DATE

2
AT RISK THIS WEEK

Oct 5
THE DATE THAT DECIDES IT

QUEEN CITY
TENANT ADVISORS

01 VENDOR BOARD · THU OCT 1, 4:30 PM · HOVER A CARD FOR ITS FULL THREAD

Every vendor between the lease and the first patient.

SHOW **All 11** | At risk 2 | Landlord side 4 | Tenant side 7

AT RISK 2
Late or escalated

TENANT SIDE — Order by Oct 5

Furniture dealer
Exam, waiting and staff furniture

DW **Dana Whitfield** Account rep

NEXT Call Dana's manager today. Stock-finish fallback to the practice Friday.

ESCALATED — Last Oct 1

LANDLORD SIDE — Asked for Oct 2

Architect
Revised casework drawings

KA **Ken Abernathy** Project architect

NEXT Call Friday at noon if the drawings are not in.

LATE — Last Sep 30

CHASING 3
Waiting on a vendor or the landlord

LANDLORD SIDE — Review ends Oct 5

Signage
Suite and directory panels

SM **Sheila Marrow** Property manager

NEXT Approval or comments by Monday, day 10 of the lease review.

WITH LANDLORD — Last Sep 30

TENANT SIDE — Fix by Oct 6

Insurance agent
Certificate naming the landlord

RT **Rick Tolliver** Commercial agent

NEXT Corrected certificate by Tuesday, then to the property manager.

WORDING FIX — Last Sep 29

TENANT SIDE — Site survey Oct 6

Internet provider
Fiber install

JV **Jill Varner** Business sales

NEXT Meet the surveyor Tuesday. Order to the practice to sign by Oct 9.

SURVEY BOOKED — Last Sep 28

WITH THE PRACTICE 2
Waiting on a signature or a pick

TENANT SIDE — Sign by Oct 6

Cabling contractor
Data drops, 48 locations

OH **Omar Haddix** Estimator

NEXT Practice signs by Tuesday so rough-in starts Oct 9.

QUOTE OUT — Last Sep 29

TENANT SIDE — Pick by Oct 9

Movers
Weekend move, two crews

LP **Lorna Pruitt** Practice administrator

NEXT Practice picks a quote by Oct 9. We book it by Oct 16.

3 QUOTES IN — Last Sep 30

NOT STARTED 1
Opens later, on purpose

LANDLORD SIDE — Staff list by Nov 6

Building security
Access badges, 22 staff

SM **Sheila Marrow** Property manager

NEXT Form on file. Staff list request to the practice Oct 26.

NOT STARTED — Last Sep 29

OPENS LATER

Staff list request to the practice **Oct 26**

Phone forwarding set with the fiber order, **72-hour overlap**

Old-office keys and walkthrough, **after move-in**

ON TRACK 3
Confirmed, checked weekly

LANDLORD SIDE — Complete Nov 2

Landlord's contractor
Tenant improvements, 6,200 SF

WK **Wade Kimbrough** Project manager

NEXT Site meeting Tuesday. Confirm the casework install window.

ON TRACK — Last Sep 30

TENANT SIDE — Delivery Nov 12

Equipment vendor
Exam tables, scales, vaccine fridges

NA **Nell Ashby** Account manager

NEXT Weekly check. Freight elevator held for Nov 12.

CONFIRMED — Last Sep 29

TENANT SIDE — Starts Nov 2

Electric utility
Account in the practice's name

BU **Business service desk** Utility

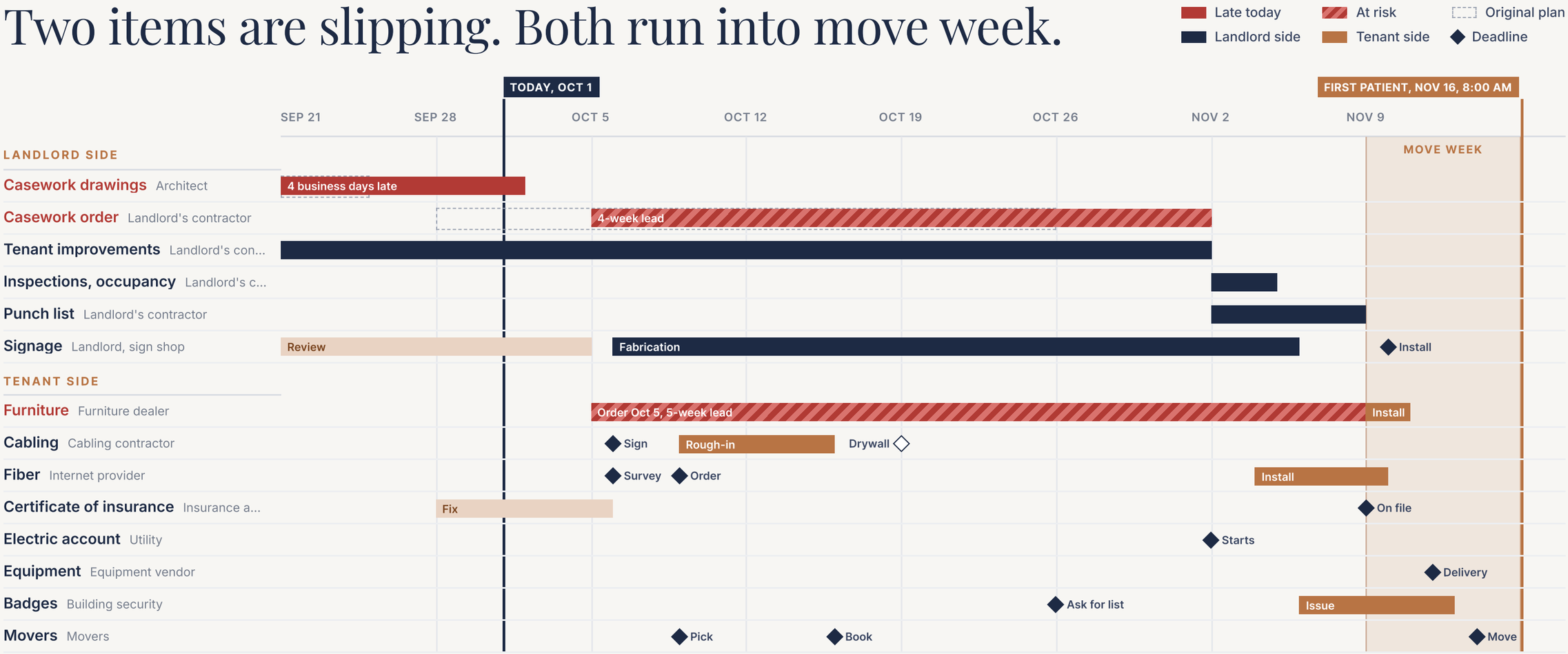
NEXT Start date confirmed. Check again the week of Oct 26.

SCHEDULED — Last Sep 29

Sample deliverable: practice, landlord, vendors, people and figures are illustrative.

02 CRITICAL PATH TO MON NOV 16

Two items are slipping. Both run into move week.



FURNITURE

The longest run that ends inside move week. An order on Oct 5 delivers Nov 9 with two business days to spare. Every day the order waits comes off that.

CASEWORK

Drawings a week late pushed the four-week order to Nov 2. That leaves four business days to install it before move access.

CABLING

Rough-in has to finish before drywall starts Oct 19. That only works if the practice signs the quote by Oct 6.

Sample deliverable: practice, landlord, vendors, people and figures are illustrative.

03 FOLLOW-UPS, SEP 28 TO OCT 1

20 touches this week. Two escalations.

Every ask carries a deadline and the reason for it. "By Oct 5, five-week lead" gets answered.

Three quiet business days, then a chase on the same thread. Two more, a call.

A date at risk reaches the broker the same day, with priced options.

SENT AND LOGGED

PICK A THREAD

Morgan Hale Oct 1
Furniture is at risk for November 16 — ESCALATED
Dana hasn't answered two emails and a call. ...

Morgan Hale Oct 1
Casework drawings late, order on hold — ESCALATED
No reply from the architect since Sep 25.

Lorna Pruitt Sep 30
Mover quotes, side by side — WITH PRACTICE
Three quotes in. One fits the elevator win...

Rick Tolliver Sep 29
Certificate of insurance, two fixes — FIXING
The landlord entity has to match the lease exactly.

Lorna Pruitt Sep 29
Cabling quote for signature — WITH PRACTICE
48 drops, checked against the plan. Sign ...

Sheila Marrow Sep 30
Signage review closes Oct 5 — WAITING
Day 7 of the landlord's 10-day review.

Sheila Marrow Sep 29
Access badges, Suite 210 — ANSWERED
Form and lead time on file. Five business days.

Jill Varner Sep 28
Fiber site survey booked — BOOKED
Survey Tuesday Oct 6, 10:00 am, at the suite.

Furniture is at risk for November 16

4 IN THREAD

Queen City Tenant Advisors · Operations Thu Sep 24, 9:12 am
TO Dana Whitfield, furniture dealer
CC Morgan Hale
THE ASK

Hi Dana,

Writing for Morgan Hale at Queen City Tenant Advisors on the Suite 210 order. The practice signed off on the layout Tuesday. Two things to place the order this week:

1. The final quote with the exam room chairs swapped to the wipeable vinyl the practice picked.
2. Your lead time from order to delivery. We are planning on five weeks.

Move-in is November 16, so we need it ordered by October 5.

Queen City Tenant Advisors · Operations Tue Sep 29, 8:40 am
Hi Dana, following up on the below. We still need the revised quote and the lead time. The order has to...

Call logged · office line Thu Oct 1, 9:05 am
Dana's line, voicemail. Left the Monday deadline and asked for a call back today.

Queen City Tenant Advisors · Operations Thu Oct 1, 11:30 am
TO Morgan Hale
ESCALATION

Morgan, the furniture dealer hasn't answered two emails and a call since September 24. The order deadline is Monday. Options:

1. **Call Dana's manager today.** It's the fastest fix if the quote just sat.
2. **Order the exam rooms from stock.** Same line in a different finish, three weeks, about $1,900 less.
3. **Rent waiting room furniture for two weeks** if the order slips. $640.

We recommend 1 today and 2 as the fallback Friday. Want us to make the call?

TEXT · TO THE FIELD

OH **Omar Haddix**
Cabling contractor

Omar, it's Queen City ops for Suite 210 at Wrenfield. The practice has your quote and signs by Tue Oct 6. Can your crew still start rough-in Fri Oct 9? Drywall starts the 19th.
Tue Sep 29, 10:22 am

Yes. Oct 9 holds if it's signed by the 6th. Two techs, six working days.
10:41 am

Perfect. We'll text you the minute it's signed.
10:43 am

Text message

15 EMAILS	3 CALLS
1 TEXTS	1 SITE MEETINGS

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04 WHAT THE PRACTICE DECIDES

Four decisions in the next eight days.

01

DECIDE BY
Fri Oct 2, noon

Furniture fallback

Order deadline Mon Oct 5. Dealer silent since Sep 24.

1	**Call Dana's manager today** We make the call today	RECOMMENDED	No cost
2	**Order exam rooms from stock** Fallback Friday: same line, other finish, 3 weeks	FALLBACK	About $1,900 less
3	**Rent waiting room furniture, 2 weeks** Only if the order slips past Nov 9		$640

DECIDES: PRACTICE, WITH MORGAN HALE

02

DECIDE BY
Tue Oct 6

Cabling quote

Rough-in Oct 9 to 16 has to beat drywall on Oct 19.

1	**Sign as quoted, 48 drops** Drop count matches the approved plan	RECOMMENDED	$13,440
2	**Hold to add drops** Added drops can go in after move-in		Risks the Oct 9 start

DECIDES: LORNA PRUITT

03

DECIDE BY
Fri Oct 9

Fiber order

Survey Oct 6. Install Nov 4 to 10, live and tested Nov 10.

1	**Order with 72-hour phone forwarding** Patients reach the practice all move weekend	RECOMMENDED	Old and new lines overlap
2	**Order without forwarding**		Phones dark Sat to Mon

DECIDES: LORNA PRUITT

04

DECIDE BY
Fri Oct 9

Movers

Freight elevator Sat Nov 14, 7:00 am to 3:00 pm only. Book by Oct 16.

A	**Two crews, 7:00 am start** Finishes inside the elevator window	RECOMMENDED	$5,950
B	**One crew of six, 9:00 am start** Likely runs past 3:00 pm		$5,200
C	**Two crews plus Sunday unpacking** Unpacking is optional		$7,600

DECIDES: LORNA PRUITT

HANDLED, NOTHING NEEDED FROM YOU

Certificate of insurance, fixed before it bounced.

- ✓ Landlord entity named exactly as in the lease, Section 11.3
- ✓ Property manager added as additional insured
- ✓ General liability $1M and $2M, umbrella $2M
- ✓ 30-day notice of cancellation wording
- ✓ Movers' certificate on file before the elevator is booked

The agent's first draft named the wrong landlord entity. It was caught on review, not by the property manager two days before the move.

CASEWORK DRAWINGS
Chased Sep 30 with the contractor copied. Call Friday at noon if they are not in.

SIGNAGE REVIEW
Day 8 of 10. Approval or comments asked for by Mon Oct 5.

BADGES
Form and lead time on file. Staff list request to Lorna Oct 26, due Nov 6.

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05 MOVE WEEK

Move week, step by step, and who confirms each one.

Mon Nov 9	**Move access opens** Certificate on file, Saturday elevator held, keys to Lorna.	PROPERTY MANAGER
Mon Nov 9	**Furniture delivered** Installed through Nov 11. At risk until it is ordered Oct 5.	FURNITURE DEALER
Tue Nov 10	**Fiber live, signs up** Lines tested. Old office phones forward for 72 hours.	INTERNET PROVIDER
Thu Nov 12	**Equipment in** Fridges logged 24 hours before vaccines arrive.	EQUIPMENT VENDOR
Fri Nov 13	**Badges and walkthrough** 22 badges active. Walkthrough with the superintendent.	BUILDING SECURITY
Sat Nov 14	**Move** Two crews from 7:00 am, elevator until 3:00 pm. Booking due Oct 16.	MOVERS
Mon Nov 16	First patient, 8:00 am	THE PRACTICE

AFTER MOVE-IN, STILL ON THE BOARD

Punch list closed
Signed off with photos within 30 days.

Old space handed back
Keys, badges and walkthrough, so the deposit comes back.

Old accounts closed
Electric, fiber and alarm, the day after the move.

Allowance paid out
Invoices and lien waivers to the landlord on time.

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