



Name: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

# GOALS WORKSHEET

We have developed this form to gather the information we need to create a plan that will best suit your personal, family and financial needs. Please answer the questions below and include any additional information that you feel is pertinent. The more information that you can give us; the better we will understand your project goals. Please provide as much information as possible and send it back to us or have it ready when you meet with our designer – as we use it for a reference guide during your design consultation.

## OUR GOAL

- Summarize in one or two sentences your goal or focus for this landscape project and what is the timeframe in which you hope to have the entire project completed.

## FINANCE & PROJECT BUDGET

What are your intentions with this project on a financial level? Please take some time to discuss, with all decision makers, your budget for this project. Once we have a budget, we will be able to begin the design process. If you would like to phase your project over multiple years, please describe your intentions.

- Would you prefer to have us design your project to include all of your ideas, without using a budget as our guide?  Yes  No
- Do you want us to design your project around a budget? If so, please select one below.

- None
- Less than \$5,000
- \$5,000 to \$10,000
- \$10,000 to \$15,000
- \$15,000 to \$20,000
- \$20,000 to \$30,000 (Average)
- \$30,000 to \$50,000
- \$50,000 to \$75,000
- \$75,000 to \$100,000
- \$100,000 Plus

- If you are working with a building contractor on your new home, have they provided you with a landscaping budget?  Yes  No If so, what is the amount? \$\_\_\_\_\_ (Keep in mind, landscaping budgets that are included by building contractors usually allow just enough money to install lawn and irrigation.)
- May we exceed this contractor's budget?  Yes  No
- If you are working with a Building Contractor on your new home, have they included budgets for other exterior projects such as patios, driveways, lighting and site grading?  Yes  No
- Would you like us to include these projects as part of your landscaping budget?  Yes  No

## PROJECT COORDINATION

(Pick one category below that best fits what you are looking for from our company)

- We are handy and are willing to install the landscape ourselves but need a great design.
- We are a little handy, but need a great design and some help installing the landscape.
- We are busy and want great ideas and a great company to install them.
  - Have you ever worked with a landscaping contractor before?  Yes  No  
Who? \_\_\_\_\_
  - If necessary would you like us to verify and attain any permits needed for structural or landscaping purposes?  Yes  No

### “DESIGNING SPACES AND INSTALLING NEW SPACES”

- Please Check ✓ all the items you want us to include in the Design
- Please Double Check ✓✓ all the items you want us to Install

- |   |  |  |
|---|--|--|
| <input type="checkbox"/> Patio                        | <input type="checkbox"/> Outdoor Kitchen/Bar     | <input type="checkbox"/> Irrigation System   |
| <input type="checkbox"/> Sitting Wall                 | <input type="checkbox"/> Fountain                | <input type="checkbox"/> Pond & Waterfall    |
| <input type="checkbox"/> Decks                        | <input type="checkbox"/> Fire Pit/ Fire Place    | <input type="checkbox"/> Perennial Garden    |
| <input type="checkbox"/> Driveway                     | <input type="checkbox"/> Swimming Pool           | <input type="checkbox"/> Vegetable Garden    |
| <input type="checkbox"/> Walkways/Paths               | <input type="checkbox"/> Hot Tub                 | <input type="checkbox"/> Herb Garden         |
| <input type="checkbox"/> Foundation/Privacy Plantings | <input type="checkbox"/> Potting or Storage Shed | <input type="checkbox"/> Cut Flower Garden   |
| <input type="checkbox"/> Arbors, Pergolas or Gazebo   | <input type="checkbox"/> Play Set/Swings         | <input type="checkbox"/> Annual Garden       |
| <input type="checkbox"/> Decorative or Privacy Fence  | <input type="checkbox"/> Low Voltage Lighting    | <input type="checkbox"/> Container Gardening |

## THINGS TO CONSIDER

(Check all that Apply)

- You will be able to drive on our yard/ lawn with a bobcat or truck
- You can drive on our driveway with trucks and equipment
- We will need additional topsoil for contouring of land
- We have existing drainage issues or concerns
- We would prefer a formal design style
- We would prefer an informal/natural style
- We have a spot on site to dispose of old rock, soil, debris, and etc.
- We have difficult neighbors
- We want disrupted lawn repaired
- We have an existing irrigation system (How do you want repairs coordinated)
- We have problems with pests such as deer and rabbits
- We have invisible dog fencing
- We are planning on adding a garage, deck, porch or addition to our home
- We will use a professional maintenance service to maintain the landscape
- We are open to doing our own yard maintenance
- We like to entertain outdoors
- We have allergies
- We have children that will use the yard

VISIT THE **PLANT GUIDE** ON OUR WEBSITE TO SEARCH PLANTS AND TO CREATE YOUR OWN PLANT LIST

## TREES

Are There Any Trees You Dislike? \_\_\_\_\_

Are There Any Trees You Would Like? \_\_\_\_\_

Do You Want Any Fruit Trees?  Yes  No What Kind? \_\_\_\_\_

## SHRUBS

Are There Any Shrubs you Dislike? \_\_\_\_\_

Are There Shrubs You Like? \_\_\_\_\_

## PERENNIALS

(Flowers That Return Every Year)

Are There Any Varieties That You Dislike? \_\_\_\_\_

Are There Any Varieties You Like? \_\_\_\_\_

## ANNUALS

(Flowers That Need To Be Replaced Every Year)

Do You Want Any Areas Incorporated In Yours Plans For Planting Annual Flowers?  Yes  No

## LAWN

Would You Prefer  Large Open Lawn Spaces Or  Minimal Mowing?

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## SITE PREPARATIONS

- Do You Want/ Need Retaining Walls?  Yes  No
- What Kind Would You Prefer?  Natural Stone  Concrete Blocks
- Do You Prefer Rock Or Wood Mulch?  Rock  Wood  Rubber Mulch
- Would You Prefer To Have Your Yard Seeded Or Sodded?  
 Seeded  Sodded
- Do you have easy access to your back yard?  Yes  No

## TIMELINE

We want to complete your project in time for your special event. Please ask your designer about our current scheduling situation. If, upon request for a certain completion time, we are currently scheduled beyond your event date, please let us know your urgency as we may be able to make arrangements with other customers to accommodate your project. We will do this only under necessary conditions, and we will try our best to accommodate your project timeline.

Please indicate below when your project installation could begin and when it **MUST** be completed and why those dates are important.

UPCOMING EVENTS (if any): \_\_\_\_\_ DESIRED START DATE : \_\_\_\_\_

REQUIRED COMPLETION DATE (if any): \_\_\_\_\_

## SUMMARY

As a company, we love to visualize your ideal landscape plan and bring it to life. Are there any other concerns or needs that we did not address?

## WE'LL SEE YOU SOON!

Please have the following information available for your on-site consultation

(The more information you can provide us, the more time we can spend creating your design):

- House Plans  Plot Plans  Septic Layout  All Decision Makers
- Pictures/Magazine Clippings of desired features and ideas  This Completed Form

**THANK YOU!** Your input brings us one step closer to creating a beautiful landscape design that will meet all of your needs! Our goal is to make your surroundings, your signature.