



BROAD REACH
CONSTRUCTION

THE COMMERCIAL OFFICE BUILD-OUT PLANNING GUIDE

A practical guide for owners, tenants, and
property managers planning a fit-out
or tenant improvement



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OWNER PLANNING GUIDE

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OWNER PLANNING GUIDE

Plan the Office You Need

This guide helps owners, office tenants, landlords, and property managers prepare for a commercial office build-out or tenant improvement. It follows the decisions that shape a project: defining needs, coordinating the team, understanding existing conditions, establishing a scope and budget, and planning the path to occupancy.

An office fit-out or build-out prepares or changes space for office use. A tenant improvement adapts space for its occupant and can involve offices or other commercial uses. A leased office project may be both. This guide focuses on office interiors in existing buildings.

Use it before requesting proposals and revisit it as the design develops. You do not need finished drawings to start a planning conversation, but clear priorities make that conversation more useful.

How to use this guide

- Identify the decisions and constraints that apply to your space.
- Complete the two-page planning worksheet with your team.
- Use the schedule checklist to record open items and responsibilities.
- Bring the worksheet, available drawings, and landlord requirements to your project-planning discussion.

Planning tip

Good planning connects the business opening date to the design, approvals, procurement, construction, and handoff needed to reach it.

OWNER PLANNING GUIDE

Define the Project

Begin with what the office must accomplish on opening day. A vacant suite build-out, a renovation, a layout reconfiguration, and an occupied tenant improvement have different constraints. A vacant suite is not necessarily a blank slate: its structure, utilities, base-building systems, and landlord requirements still shape the work.

Questions to settle early

- How many people must the space accommodate now, and what growth is anticipated?
- Which private offices, meeting rooms, reception areas, support spaces, and storage areas are essential?
- What IT, audiovisual, security, and building-system requirements must be ready at occupancy?
- Will employees or neighboring tenants remain in the building during construction?
- What is the target occupancy date, and how flexible is it?
- Which features are essential for opening day, and which could be phased later?

Involve end users, IT staff, and facilities representatives. Record requirements and assumptions in a shared log, then review them as the scope develops. Name the person authorized to resolve conflicting priorities.

Planning tip

Define opening-day success in writing. Clear needs and constraints reduce avoidable redesign and late changes.

OWNER PLANNING GUIDE

Assemble the Project Team

A build-out needs clear decision authority as well as technical expertise. Some organizations may perform several roles; the responsibility still needs to be explicit.

Owner or tenant decision-maker

Defines business needs, confirms the budget and priorities, and authorizes scope changes and commitments.

Landlord and property manager

Clarify lease deliverables, building standards, access rules, shutdown procedures, and approval requirements.

Architect and engineers

Develop and coordinate the design, prepare required documents, and address applicable building-system and code requirements within their scope.

Construction manager

Coordinates planning, cost information, schedules, procurement, reporting, and field oversight according to the agreed contract and delivery structure.

General contractor and trade partners

Plan and execute the contracted construction work, coordinate trades, and manage site activities and construction quality.

IT, furniture, AV, and facilities teams

Coordinate owner-supplied equipment, installations, training, and operational readiness with the construction schedule.

Record who approves designs, changes, spending, and schedule adjustments. Establish a regular meeting rhythm and a shared decision log.

OWNER PLANNING GUIDE

Review the Lease and Existing Space

Review the lease, work letter, building standards, and existing conditions together. A work letter may describe landlord-delivered work, tenant improvement allowances, approved expenses, responsibilities, and the condition of the space at handoff. Confirm the meaning of unclear terms with the appropriate lease advisers.

Confirm before finalizing the scope

- What does the landlord deliver, and by what date?
- Which improvements are tenant-funded, landlord-funded, or subject to an allowance?
- Which contractors, materials, work hours, access routes, and approvals does the building require?
- What drawings, system records, or prior permits are available?
- Who coordinates changes to shared systems outside the suite?
- Are there restoration obligations at the end of the lease?

Walk the site with the relevant project professionals. Compare the actual space with available drawings and landlord commitments. Document discrepancies with photographs and notes. Review HVAC, electrical capacity, plumbing, fire protection, and communications infrastructure for the intended use.

Planning tip

Never rely on the drawing alone. Confirm existing conditions before committing to the scope, budget, and construction sequence.

OWNER PLANNING GUIDE

Build a Realistic Scope

The scope should describe what is included, what is excluded, and what information remains unresolved. Connect each requirement to the opening-day needs established by the owner or tenant.

- Layout: workstations, private offices, meeting rooms, reception, circulation, and storage.
- Interior work: demolition, partitions, doors, ceilings, flooring, finishes, and acoustics.
- Building systems: HVAC, electrical distribution, lighting, plumbing, fire protection, and controls as applicable.
- Technology: data pathways, server spaces, AV, security, and owner-supplied equipment interfaces.
- Accessibility and life safety: requirements evaluated by the responsible design professionals and reviewing authorities.
- Operations: deliveries, access, phasing, temporary protection, and any planned shutdowns.

List assumptions about existing conditions and responsibilities. Clarify whether furniture, signage, equipment, low-voltage work, and relocation are included in the construction proposal or provided separately.

Specialized facilities may need a different planning approach. Medical spaces, for example, can introduce requirements beyond a conventional office fit-out. Identify specialty uses early and involve the appropriate specialists.

Planning tip

A useful scope identifies both the deliverables and the boundaries. Review it when designs or business needs change.

OWNER PLANNING GUIDE

Establish the Budget

Build a complete project budget rather than treating the construction proposal as the entire cost. Identify each allowance, exclusion, assumption, and owner-supplied item. Review the budget as scope and pricing become clearer.

Construction

Demolition, trade work, finishes, site supervision, temporary protection, logistics, and other contracted construction costs.

Design and professional services

Architectural and engineering work, surveys, testing, and specialist services required by the project.

Approvals and fees

Permits, inspections, and applicable review or building charges.

Furniture, equipment, and technology

Furniture, AV, IT, security, equipment, installation, and supporting infrastructure.

Move-in and operational readiness

Relocation, cleaning, staff preparation, and other costs needed to begin operations.

Contingency and unresolved scope

Allowances for identified uncertainty, established with the project team and reviewed as risks are resolved.

Do not apply a fixed contingency percentage without evaluating the project.

Existing-condition uncertainty, design maturity, occupied work, material lead times, and owner changes can affect the reserve required. Agree how it will be tracked and authorized.

OWNER PLANNING GUIDE

Plan Backward From Occupancy

Work backward from the target occupancy date to identify milestones, dependencies, and the latest practical decision dates. Keep the target separate from the forecast: a desired move-in date is not yet a validated construction schedule.

- Confirm the scope, design responsibilities, and decision dates.
- Coordinate landlord review and required permit submissions.
- Identify long-lead equipment and materials, approvals, and procurement responsibilities.
- Sequence construction, utility coordination, inspections, and appropriate systems testing.
- Allow time for corrections, closeout, furniture and IT installations, and operational readiness.
- Confirm the approvals required for the intended occupancy before move-in.

Distinguish planning and procurement from fieldwork that requires permits. Some activities may overlap where authorized and practical; others depend on approvals or completion of prior work. Review those dependencies with the responsible project professionals.

Include realistic review allowances and identify schedule risks. Assign an owner to each open milestone, then update the forecast when decisions, deliveries, or existing conditions change.

Planning tip

A credible schedule shows what must happen, who is responsible, and what the next activity depends on.

OWNER PLANNING GUIDE

Coordinate Permits and Building Approvals

The approval path depends on the jurisdiction, existing building, use, and scope. Coordinate the design team, local reviewing authorities, landlord, and property manager early. Avoid assuming that landlord approval replaces a permit, or that a permit replaces building-management consent.

- Design professionals prepare required documents and coordinate responses to review comments.
- The reviewing authorities determine applicable submission, inspection, and occupancy requirements.
- The landlord reviews work against lease obligations and building standards.
- Property management coordinates access, deliveries, shutdowns, and building procedures.
- The designated project coordinator tracks submissions, comments, responsibilities, and outstanding decisions.

Maintain an approval log with the submission date, current status, responsible party, next action, and expected milestone. Build review and response time into the schedule. Confirm requirements with the applicable authority rather than carrying assumptions from another city or project.

Planning tip

For North Carolina projects, verify the requirements for the specific location and scope. Charlotte, Raleigh, and other markets should not be treated as one approval process.

OWNER PLANNING GUIDE

Work in an Occupied Building

Occupied and multi-tenant work requires a plan for people and operations as well as construction. Develop it with the owner, tenant, property manager, and responsible project team before fieldwork begins.

- Separate construction routes, work areas, deliveries, and waste removal from occupied areas where needed.
- Coordinate noisy work, planned shutdowns, access restrictions, and after-hours activities.
- Select appropriate dust-control, containment, and ventilation measures for the work and building conditions.
- Maintain required egress and coordinate any temporary changes to life-safety arrangements through the appropriate procedures and approvals.
- Notify affected occupants before disruptive work and provide a clear contact for questions.
- Review the phasing plan as site conditions or business needs change.

Do not assume every office project requires the same containment equipment or shutdown process. The controls should follow the actual work, risks, building requirements, and applicable standards. Planned system interruptions require coordination and suitable protection measures.

Planning tip

Communication is part of the construction plan. Give occupants clear information about what changes, when it changes, and whom to contact.

OWNER PLANNING GUIDE

Choose a Delivery and Management Approach

Construction management, general contracting, and design-build describe different roles or contract arrangements. They are not always mutually exclusive. The agreed contracts determine who holds the trade contracts, carries construction risk, manages the design, and authorizes changes.

Construction management

CM can provide early planning, cost and schedule input, procurement coordination, reporting, and construction oversight. Its responsibilities differ between advisory arrangements and structures where the construction manager also holds construction contracts or assumes construction risk.

General contracting

A general contractor manages the contracted construction work and trade coordination. Selection may be based on competitive bids, qualifications, negotiation, or a combination. Early contractor participation is possible when the project arrangement supports it.

Design-build

Design-build places design and construction responsibility within one contracted delivery team. Owner input remains important: establish requirements, design review points, approval authority, and reporting expectations before work advances.

Choose around the project

Compare scope maturity, existing-condition uncertainty, schedule, owner resources, procurement needs, and accountability. Broad Reach approaches office projects through construction management practices that connect cost, schedule, coordination, and field oversight to the owner's objectives.

OWNER PLANNING GUIDE

Manage Changes and Quality

Establish a written process for changes before they arise. Identify who may request a change, who evaluates its effects, and who may authorize the commitment. Handle urgent site or safety conditions through the agreed escalation procedures.

- Record the requested change and its reason.
- Evaluate effects on scope, cost, procurement, schedule, and occupied operations.
- Document the authorized decision before proceeding where required by the contract.
- Update the budget, drawings, schedule, and affected parties.
- Track unresolved questions and decisions that could affect upcoming work.

Use meeting records, decision logs, progress reporting, and regular field reviews to keep information current. Inspect work at appropriate stages, especially before components are concealed or later activities depend on them.

Record deficiencies, the responsible party, corrective actions, and verification. Begin tracking completion items during construction rather than waiting until the final walkthrough.

Planning tip

Every change should have a visible effect on the project records. Clear documentation helps owners understand the decision and its consequences.

OWNER PLANNING GUIDE

Prepare for Turnover

Turnover connects construction completion to a usable office. Plan the handoff early so documentation, owner installations, training, and approvals do not become last-minute obstacles.

- Confirm the inspections and approvals required for the intended occupancy.
- Create a punch list with responsible parties and completion dates.
- Complete appropriate testing, commissioning, and verification for each building system.
- Collect agreed record drawings, warranties, manuals, and other closeout documents.
- Coordinate furniture, IT, security, cleaning, and relocation with the construction handoff.
- Train the relevant facilities staff and users on systems within the agreed scope.
- Provide warranty contacts and a clear process for reporting post-occupancy issues.

Manage outstanding items and payment milestones according to the contract. Confirm who accepts the work and who retains the closeout records. Distinguish readiness to occupy from final completion of every contractual obligation.

Planning tip

Prepare the people as thoroughly as the space. A documented handoff supports daily operations after the construction team leaves.

PROJECT TOOLS | COMPLETE WITH YOUR TEAM

Project Planning Worksheet - Part 1

Record what you know. Mark unresolved items for discussion; finished drawings are not required to begin planning.

Project address and owner / tenant contact

Approximate square footage and intended use

Existing condition and available drawings

Target occupancy date and flexibility

Opening-day priorities and future needs

Budget range and known allowances

PROJECT TOOLS | COMPLETE WITH YOUR TEAM

Project Planning Worksheet - Part 2

Record what you know. Mark unresolved items for discussion; finished drawings are not required to begin planning.

Building-system changes and specialty requirements

Landlord deliverables, approvals, and building rules

Occupied operations, access, and shutdown constraints

Owner-supplied furniture, IT, AV, and equipment

Decision-maker, project team, and responsibilities

Open questions, assumptions, and next steps

PROJECT TOOLS | BEFORE APPROVING THE SCHEDULE

Schedule Review Checklist

Check each item reviewed. Record unresolved items below with a responsible person and target date. A schedule may be developed while approvals are outstanding, provided the dependencies and assumptions are visible.

- ☐ Scope, assumptions, and exclusions are understood.
- ☐ Design decisions and owner approval dates are identified.
- ☐ Outstanding permits and landlord approvals have assigned owners and realistic allowances.
- ☐ Long-lead items have procurement dates, responsibilities, and delivery assumptions.
- ☐ Landlord-delivered work and shared-system dependencies are included.
- ☐ Occupied-work restrictions and shutdown coordination are included.
- ☐ Inspection, testing, correction, and occupancy milestones are included.
- ☐ Furniture, IT, move-in, closeout, and training are coordinated.

Open item / responsible person / target date

YOUR NEXT STEP

Discuss Your Office Project With Broad Reach

Planning an office build-out, fit-out, or tenant improvement? Bring your completed worksheet, available drawings, landlord requirements, and target occupancy date to a conversation with Broad Reach Construction.

We can discuss your current stage, identify information still needed, and outline the next planning steps for scope, budget, schedule, and construction coordination.

Call (984) 332-3927

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Charlotte office

4108 Park Rd, Suite 215
Charlotte, NC
Opening October 1, 2026

Planning tip

Start with the information available today. Identifying missing details early helps the project team make better planning decisions.

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