

ILLUSTRATIVE SAMPLE — NOT A REAL CLIENT

Preconstruction Audit

2,000 SF leased shell • Six planned operatories • General dentistry startup

OVERALL	CAPITAL RISK	DECISION STATUS
AMBER	Unpriced utilities + broad allowances	Do not approve yet

Executive finding

The concept appears workable, but the owner is being asked to approve a budget before several high-impact responsibilities are documented. The largest exposure is not the visible finish package; it is uncertainty around HVAC capacity, electrical service, plumbing routes, demising work, dental mechanical systems, and contractor allowances. A coordinated clarification round should happen before final lease, drawings, or contractor award.

Immediate actions

Priority	Action	Owner-side reason
1	Request a written base-building and utility responsibility matrix.	Prevents landlord/tenant gaps from surfacing as change orders.
2	Verify available HVAC tonnage, outside air, electrical service, panel capacity, water, sewer, and roof/shaft access.	Dental loads and routing can materially alter both feasibility and cost.
3	Convert major allowances into defined scope or competitively supported numbers.	An allowance is not a price; it transfers overage risk to the owner.
4	Rough-in all six operatories; evaluate equipping three or four at opening.	Preserves capacity while delaying selected equipment cash outlay.
5	Reconcile the architectural plan, equipment plan, and contractor estimate line by line.	Detects scope that is missing, duplicated, or assumed by multiple parties.

Illustrative opportunity range

This sample does not promise savings. It shows where an owner may protect capital through scope clarification, phasing, competitive pricing, or avoidance. Any dollar impact must be validated against project documents and third-party proposals.

Lever	Illustrative effect	Validation needed
Equipment phasing	Delay nonessential day-one purchases	Confirmed production plan and rough-in strategy
Allowance conversion	Reduce unknown overages	Trade scope, quantities, and comparable bids
Lease/work-letter clarification	Shift eligible base-building items or secure TI support	Broker and attorney negotiation
Plan correction before permit	Avoid redraw and field rework	Architect/engineer confirmation

1. Lease, site, and base-building review

The audit does not replace legal review. These are business and technical questions for the owner's broker, attorney, landlord, architect, and engineers.

Status	Finding	Question / next step
RED	Demising wall is referenced but responsibility and delivered condition are unclear.	Who pays for structure, finishes, acoustic treatment, fire rating, doors, and inspection corrections?
RED	HVAC is described as existing/available without load confirmation.	Provide a mechanical assessment showing capacity for six operatories, sterilization, lab, occupants, imaging, and equipment heat.
AMBER	Electrical service and panel capacity are not documented.	Confirm service size, phase, spare capacity, transformer responsibility, and dedicated equipment circuits.
AMBER	Water and sanitary connection points are shown conceptually.	Locate, size, and price connections; confirm slab trenching/core drilling and restoration.
AMBER	Roof and exterior penetrations require landlord approval.	Obtain written pathway/approval process for exhaust, compressor intake, vacuum discharge, and equipment.
GREEN	Use appears compatible with general office zoning in concept.	Licensed team still must verify zoning, use, accessibility, life safety, and local approvals.

Recommended responsibility matrix

System / item	Landlord	Tenant	Confirm before
Demising and rated assemblies	TBD	TBD	Lease execution
HVAC capacity / distribution	TBD	TBD	Final design
Electrical service / panel	TBD	TBD	Equipment plan
Water / sewer to premises	TBD	TBD	Construction pricing
Roof / shaft access	Approval	Likely cost	Permit drawings
Fire alarm / sprinkler changes	TBD	TBD	Contractor award

2. Clinical plan and workflow

Area	What works	Risk / recommendation
Operatories	Six-room shell capacity supports growth.	Equip 3–4 at opening if production/staffing supports it; fully rough-in remaining rooms.
Sterilization	Central location can serve all rooms.	Map dirty-to-clean flow, cassette staging, instrument storage, handwashing, and future volume.
Imaging	Dedicated location reduces operator conflict.	Confirm modality, shielding analysis, equipment clearances, and state/local requirements.
Lab / utility	Separated support rooms improve noise control.	Verify ventilation, drain, compressed air/vacuum equipment clearances, service access, and heat rejection.
Team flow	Rear clinical corridor can reduce front-desk traffic.	Test assistant paths, supply replenishment, doctor movement, egress, and wheelchair turns.
Storage	Millwork is distributed.	Inventory categories before ordering cabinets; avoid paying for low-value built-ins.

Room-by-room decision checklist

Room	Confirm
Each operatory	Treatment type, handedness, delivery system, suction, air/water, power/data, lighting, monitor, imaging, storage, clearances, future conversion.
Sterilization	Instrument volume, dirty/clean separation, washer/ultrasonic, sterilizers, water, ventilation, heat, storage, pass-through assumptions.
Mechanical	Compressor/vacuum sizing, redundancy, noise, service access, drain, ventilation, alarms, utilities, vendor requirements.
Imaging	CBCT/pano/intraoral strategy, shielding professional, control location, network/storage, growth plan.
Front / consult	Check-in/out, privacy, case presentation, collections conversation, accessible counter, records and package storage.

3. Budget, bid, and equipment review

The goal is not to choose the lowest number. It is to compare the same scope, reveal assumptions, and reserve cash for the items that actually open the practice.

Flag	Typical cost mechanism	Owner action
Broad HVAC allowance	Overage after design/load confirmation	Define basis, capacity, controls, balancing, permits, roof work, and commissioning.
Plumbing excluded below slab	Late trenching/core/drain costs	Obtain routes, quantities, patching, scanning, and structural conditions.
Dental equipment by owner	GC assumes vendor covers connections; vendor assumes GC does	Create a connection matrix with one named responsible party for every utility.
Cabinet package bundled	Reduced price transparency and premature customization	Separate clinical need, millwork scope, alternates, freight, install, and tax.
Permit/design fees excluded	Soft-cost surprise	Build a complete soft-cost schedule and contingency.
No escalation/lead-time plan	Rush freight, substitutions, opening delay	Identify long-lead decisions and latest safe order dates.

Illustrative day-one / phase-later logic

Category	Day one	Potentially phase later
Clinical rooms	Enough equipped rooms for staffed schedule plus recovery capacity	Chairs/delivery/monitors in unused growth rooms
Dental mechanical	Correctly sized core systems and required distribution	Optional redundancy if risk/capacity analysis supports later addition
Imaging	Modality required for actual services	Second modality or upgrades not needed at launch
Technology	Secure network, phones, workstations, backups	Nice-to-have displays, automation, or duplicate hardware
Finish / millwork	Durable, cleanable, code-compliant essentials	Decorative upgrades and low-use built-ins

4. Decision log and handoff

Owner	Decision / deliverable	Due	Status
Broker + attorney	Lease/work-letter responsibility matrix	Before lease amendment / waiver	OPEN
Architect + MEP engineers	Verified utilities, loads, routing, code, and permit path	Before final drawings	OPEN
Equipment team	Room utility/connection schedule and phased quote	Before GC final price	OPEN
General contractor	Revised bid with defined allowances/exclusions and alternates	Before award	OPEN
Owner + lender	Complete sources/uses, contingency, and opening cash reserve	Before final commitment	OPEN

What Dental Build IQ would deliver

- Marked-up finding register organized by urgency and decision deadline
- Bid/equipment reconciliation showing exclusions, overlaps, allowances, and phase-later candidates
- Questions routed to the correct professional—without replacing their work
- Owner decision log and 60-minute findings call

This sample is educational and illustrative. Actual recommendations require the complete project documents, local licensed professionals, and owner-specific clinical and financial assumptions.

Sample scope boundary

Dental Build IQ does not prepare or stamp drawings; select, direct, or supervise contractors; determine code compliance; provide engineering, architectural, legal, tax, or lending advice; or guarantee pricing, schedule, permitting, performance, or savings. The owner and retained licensed professionals remain responsible for all final decisions and documents.