



BIM outsourcing scope checklist.

A practical briefing tool for architecture, engineering, construction, VDC and modular-building teams.

05-MINUTE PROJECT SNAPSHOT

PROJECT / TYPE	LOCATION / TIME ZONE
APPROX. AREA	CURRENT STAGE
PRIMARY REQUIRED OUTCOME	
FIRST REVIEW / FINAL ISSUE	DECISION OWNER
REPRESENTATIVE INPUT / SAMPLE OUTPUT	

DEFINE / MOBILIZE / PRODUCE / COORDINATE / CHECK / ISSUE

Start with why the information exists.

A reliable scope describes intended uses, deliverables and responsibility - not just a blanket LOD number.



01

Project identity

Type, location, approximate area, building use and current project stage.



02

Intended use

Design, coordination, permits, construction, fabrication, quantities, sequencing, handover or operations.



03

Disciplines

Architecture, structure, MEP, civil, specialist systems and which party owns each source model.



04

Required outputs

Native models, federated models, sheets, schedules, reports, RFIs, quantities, exports or asset data.



05

Definition level

Geometry, information, tolerance and acceptance criteria by element or package.



06

Responsibility

Design authority, coordination decisions, professional approvals, RFIs and final issue ownership.



07

Exclusions

Site verification, inaccessible conditions, design changes, fabrication approval, cost advice or other boundaries.



08

Success criteria

What must be true for the package to be accepted at each milestone.

Make the working rules visible before production starts.

01 Source information

- ☐ Current models and drawing registers
- ☐ CAD, PDFs, scans or point clouds
- ☐ Specifications, schedules and approved changes
- ☐ Sample deliverable or reference package

02 Standards + coordinates

- ☐ Template, families and shared parameters
- ☐ Naming, worksets and browser structure
- ☐ Survey, project base and shared coordinates
- ☐ Classification and information requirements

03 Technology + exchange

- ☐ Revit and authoring-tool versions
- ☐ BIM 360 / CDE access and permissions
- ☐ Exchange formats and export settings
- ☐ Hardware, plugin or API dependencies

04 Communication + change

- ☐ Primary contact and escalation route
- ☐ Meeting cadence and time-zone overlap
- ☐ RFI, issue and decision workflow
- ☐ Revision cut-offs and change authorization

Define how work becomes issue-ready.



01

Programme

Start date, milestones, reviews, issue dates, dependencies and client response assumptions.



02

Model health

Warnings, links, worksets, coordinates, file size, families, views and agreed audit thresholds.



03

Geometry + information

Element coverage, clearances, parameters, classification, schedules and model-purpose checks.



04

Coordination

Federation cadence, clash rules, tolerances, priorities, issue statuses and approved-resolution route.



05

Documentation

Sheet list, annotations, details, schedules, revision data and printing/export acceptance checks.



06

Commercial + revisions

Pricing basis, included reviews, dependencies, delay effects and change authorization.



07

Security + access

NDA, permissions, approved storage, retention, deletion and incident contacts.



08

Handover

File naming, versions, native and exchange files, reports, unresolved issues and assumption register.

Ready to scope the project?

Send the project type, location, deliverables, software, target stage or LOD and timeline.

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