

CLIENT INTAKE + PROJECT QUALIFICATION

Benton Marine Project Review

Complete what you know. This information helps Benton understand the project, identify immediate concerns, and recommend the right level of review.

SUBMISSION NOTICE

Submission does not create a consulting agreement. Services begin only after scope, fees, and written terms are accepted by both parties.

01**CONTACT INFORMATION**

PRIMARY CONTACT NAME *

COMPANY / ORGANIZATION

TITLE / ROLE

EMAIL ADDRESS *

MOBILE PHONE *

OFFICE PHONE

PREFERRED CONTACT METHOD

☐ Email☐ Phone☐ Text**02****PROJECT IDENTIFICATION**

PROJECT NAME *

PROJECT OWNER

PROJECT ADDRESS / WATERBODY *

CITY / COUNTY / STATE *

GPS COORDINATES

PARCEL OR PERMIT REFERENCE

PROJECT ENGINEER

CURRENT CONTRACTOR

03

PROJECT PROFILE

PROJECT TYPE - SELECT ALL THAT APPLY

- | | |
|--|--|
| ☐ Marina | ☐ Commercial dock |
| ☐ Residential dock | ☐ Fixed pier |
| ☐ Floating dock | ☐ Seawall / bulkhead |
| ☐ Sheet pile | ☐ Timber pile |
| ☐ Concrete pile | ☐ Steel / composite pile |
| ☐ Boat lift | ☐ Travel-lift / forklift facility |
| ☐ Dredging | ☐ Rock punching |
| ☐ Riprap / revetment | ☐ Marine concrete |
| ☐ Demolition | ☐ Hurricane repair |
| ☐ Shoreline stabilization | ☐ Other |

CURRENT PROJECT STAGE - SELECT ONE

- | | |
|--|--|
| ☐ Initial planning | ☐ Budgeting |
| ☐ Design / engineering | ☐ Permitting |
| ☐ Bid preparation | ☐ Bidding |
| ☐ Contractor selection | ☐ Preconstruction |
| ☐ Active construction | ☐ Closeout / dispute |

ESTIMATED PROJECT VALUE - SELECT ONE

- | | |
|---|---|
| ☐ Under \$100,000 | ☐ \$100,000-\$500,000 |
| ☐ \$500,000-\$1 million | ☐ \$1-\$5 million |
| ☐ \$5-\$10 million | ☐ Over \$10 million |
| ☐ Unknown / not established | |

BRIEF PROJECT DESCRIPTION

04

REQUESTED REVIEW

SELECT THE QUESTIONS OR DOCUMENTS YOU WANT BENTON TO EXAMINE

- | | |
|---|--|
| ☐ Plans / specifications | ☐ Bid documents |
| ☐ Contractor proposal | ☐ Cost estimate |
| ☐ Scope completeness | ☐ Constructability |
| ☐ Site / water access | ☐ Equipment and staging |
| ☐ Pile installation | ☐ Rock conditions |
| ☐ Dredging quantities | ☐ Disposal / beneficial use |
| ☐ Material quantities | ☐ Budget exposure |
| ☐ Engineering coordination | ☐ Permitting dependencies |
| ☐ Contractor comparison | ☐ Change-order review |
| ☐ Schedule / sequencing | ☐ General consultation |

CURRENT CONCERNS AND DECISIONS *

KNOWN CONSTRAINTS OR CONFIDENTIAL SENSITIVITIES

WHO WILL MAKE THE NEXT DECISION?

WHAT HAPPENS IF THE DECISION IS DELAYED?

05

DOCUMENTS AND SCHEDULE

AVAILABLE DOCUMENTS - SELECT ALL THAT APPLY

- | | |
|--|--|
| ☐ Drawings / PDF plans | ☐ Specifications |
| ☐ Proposal / bid tabulation | ☐ Cost estimate |
| ☐ Schedule | ☐ Geotechnical report |
| ☐ Survey / bathymetry | ☐ Permits / agency comments |
| ☐ Site photographs | ☐ Drone images |
| ☐ Existing-condition report | ☐ Inspection report |
| ☐ Environmental testing | ☐ Other |

DESIRED CONSTRUCTION START

DESIRED COMPLETION

BID / PROPOSAL DEADLINE

PERMIT / AGENCY DEADLINE

DECISION DEADLINE

REQUESTED REVIEW DATE

CRITICAL SCHEDULE NOTES

HAS ANOTHER PROFESSIONAL REVIEWED THIS PROJECT?

☐ Yes ☐ No ☐ Unknown

PRIOR REVIEW AND UNRESOLVED DIFFERENCES

06

SERVICE PREFERENCE AND RESOURCES

DESIRED SERVICE - SELECT ONE

- ☐ Initial Project Consultation
- ☐ Project Document Review
- ☐ Comprehensive Preconstruction Review
- ☐ Ongoing Project Advisory
- ☐ Not sure - please recommend

HOW DID YOU HEAR ABOUT BENTON?

- | | |
|---|---|
| ☐ Referral | ☐ Existing client |
| ☐ Engineer / contractor | ☐ Marina / industry contact |
| ☐ YouTube / Dock Talk | ☐ LinkedIn |
| ☐ Facebook | ☐ Google / website |
| ☐ ChatGPT / AI search | ☐ Other |

OPTIONAL BENTON RESOURCES

- ☐ Marine construction articles
- ☐ Project-planning checklists
- ☐ YouTube / Dock Talk updates
- ☐ BME / Bid Tracker beta opportunities
- ☐ Webinar or workshop invitations
- ☐ I agree to receive the selected resources and may unsubscribe at any time.

ADDITIONAL INFORMATION

07

AUTHORIZATION

I certify that the information provided is accurate to the best of my knowledge. I understand that submitting this form does not create a consulting agreement, professional engineering relationship, or obligation for Benton Consulting & Management to accept the engagement. Professional services begin only after both parties approve the scope, fees, and written terms.

AUTHORIZED NAME *

TITLE / ROLE

TYPED OR HANDWRITTEN SIGNATURE *

DATE *

DOCUMENT DELIVERY

Send the completed form to roy@bentonconsultingandmanagement.com. For plans, large files, or confidential project documents, request secure upload instructions before sending.

CONTACT

239-823-6075 / roy@bentonconsultingandmanagement.com / bentonconsultingandmanagement.com

OUR COMMITMENT

Leave it better than you found it. We help clients make informed decisions before expensive problems occur and prepare the project for what comes next.

08

INTERNAL QUALIFICATION

Benton use only - remove this page from client copies when appropriate.

LEAD NUMBER

DATE RECEIVED

REVIEWED BY

LEAD SOURCE

ESTIMATED OPPORTUNITY

RECOMMENDED SERVICE

PROPOSAL DUE

FOLLOW-UP DATE

RAPID RISK SCREEN

- ☐ Scope or documents are incomplete
- ☐ Deadline is within 30 days
- ☐ Access / staging appears constrained
- ☐ Piles / rock / dredging / disposal uncertain
- ☐ Proposals are difficult to compare
- ☐ Budget appears inconsistent with scope
- ☐ Responsibilities are unclear
- ☐ Active construction or dispute exists
- ☐ Decision-maker is engaged
- ☐ Consulting budget is present

PRIORITY - SELECT ONE

☐ High ☐ Medium ☐ Low ☐ Refer / decline

QUALIFICATION NOTES AND NEXT ACTION

FIELD NOTES AND SKETCH GRID

PROJECT

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