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/ 01_Concept 02_Schematic 03_DesignDevelopment

Architecture Workflow Templates

A companion workbook for the
Ultimate Architecture Workflow Toolkit



INSIDE THIS WORKBOOK

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| – Architect Productivity Stack | – Workflow Audit Matrix |
| – Second Brain Framework Worksheet | – Weekly Operating System Dashboard |
| – File Naming & Folder Structure | – 30-Day Action Plan Checklist |

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GETTING STARTED

How to Use This Workbook

Three things to know before you start filling in the templates ahead.

1 What's inside

This workbook contains six fillable templates that match the systems covered in the Ultimate Architecture Workflow Toolkit article: the Productivity Stack, the Workflow Audit Matrix, the Second Brain Framework, the Weekly Operating System Dashboard, a File Naming and Folder Structure example, and a 30-Day Action Plan checklist.

2 How it pairs with the article

Each template corresponds to a section of the article. Read the relevant section first, then come back here and fill in the matching page while the ideas are still fresh. The templates are intentionally short — most take five to ten minutes to complete.

3 Suggested order

Work through the pages in order: Productivity Stack, then Workflow Audit Matrix, then the Second Brain worksheet, then the Weekly Dashboard, then the Folder Structure template, and finish with the 30-Day Action Plan. You can print this workbook, fill it in on a tablet, or copy the structures into your own notes app.

TIP — Keep it visible

Keep this workbook somewhere you will actually see it again — a printed copy on your desk or a pinned file works better than a download folder you will forget about.

TEMPLATE 1 OF 6

Architect Productivity Stack

List the tool or habit you currently use for each layer. If a row is blank, that is the layer to fix first.

LAYER	PURPOSE	YOUR CURRENT TOOLS
Capture	Catch ideas, notes and references the moment they appear	
Research	Store and tag code references, precedents and climate data	
Design	Move concepts through sketch, BIM and rendering stages	
Documentation	Record drawings, specifications and approvals	
Communication	Coordinate with clients, consultants and contractors	
Publishing	Turn finished projects into case studies and content	

REFLECTION

Which layer above has no tool or habit listed? That is the layer to prioritize in your 30-Day Action Plan.

TEMPLATE 2 OF 6

Workflow Audit Matrix

Rate each layer from 1 (barely exists) to 5 (fully systematized and consistently used). Circle your score and jot one note per row.

LAYER	SELF-AUDIT QUESTION	1	2	3	4	5
Information Capture	Do all notes and references land in one trusted place?	(1)	(2)	(3)	(4)	(5)
Research	Can you find a past code or precedent note in under two minutes?	(1)	(2)	(3)	(4)	(5)
Design Workflow	Does every project follow the same folder and naming structure?	(1)	(2)	(3)	(4)	(5)
Documentation	Are decisions and approvals recorded the same day they happen?	(1)	(2)	(3)	(4)	(5)
Communication	Do clients and consultants receive predictable, structured updates?	(1)	(2)	(3)	(4)	(5)
Publishing	Is case study material captured during the project, not after?	(1)	(2)	(3)	(4)	(5)

NOTE — Lowest score this quarter

Write the layer with your lowest score here — that is the layer to focus on for the next 30 days.

TEMPLATE 3 OF 6

Second Brain Framework Worksheet

Map your own tools and habits onto this four-step cycle. Be specific — name the actual app or folder you will use.

1**Capture**

Send every note, image and reference to one inbox, without sorting yet.

What is your one trusted inbox?

2**Tag**

During a weekly review, add project, topic and climate tags to new items.

What three tags will you use most often?

3**Organize**

Move tagged items into the right project folder or research library.

Where does organized material live?

4**Retrieve**

Search by tag, not by memory, whenever you need the information again.

How will you search — by app, folder, or tag?

TEMPLATE 4 OF 6

Weekly Operating System Dashboard

Fill in your own rhythm for the week ahead. Monday and Friday are pre-filled with the suggested rhythm from Section 10 of the article — adjust freely.

FOCUS	MON	TUE	WED	THU	FRI
Morning Focus	<i>Plan the week, review open decisions</i>				<i>Send client & consultant updates</i>
Afternoon Focus					
Capture / Review					<i>Clear capture inbox, tag research</i>

CALLOUT — Protect the Friday rhythm

This weekly system only works if Friday's review actually happens. Treat that time block like a client meeting — put it in your calendar and protect it.

TEMPLATE 5 OF 6

File Naming & Folder Structure Template

Copy this structure directly into a new project folder. The naming pattern keeps every drawing version sortable and unambiguous.

ProjectName /

```
01_Concept
02_Schematic
03_DesignDevelopment
04_ConstructionDocs
05_Admin
```

File Naming Convention

ProjectName_DrawingType_YYYY-MM-DD_V##

Worked example: Riverside-House_FloorPlan-L1_2026-06-28_V03.dwg

RULES TO FOLLOW

- Use ISO date format (YYYY-MM-DD) so files sort chronologically
- Never overwrite a file without renaming the previous version first
- Keep one "current" file per drawing type, clearly marked
- Archive, do not delete, superseded design iterations

WARNING — Avoid generic file names

File names like 'Plan_Final2' or 'Drawing_Latest' are a common source of costly construction errors when the wrong version reaches the site.

TEMPLATE 6 OF 6

30-Day Action Plan Checklist

Check off each task as you complete it. Sixteen tasks total, four per week, matching the 30-Day Action Plan in the article.

0 / 16 tasks complete

Week 1**Organize Information Capture**

- ☐ Choose one app or notebook as your single capture inbox
- ☐ Move existing scattered notes into the new inbox
- ☐ Set a recurring 15-minute weekly review on your calendar
- ☐ Create a simple tagging system: project, topic, climate zone

Week 2**Build Research Systems**

- ☐ Create folders or tags for your most-used code categories
- ☐ Start a precedent study template and fill in three past projects
- ☐ Organize one research folder by climate zone
- ☐ Test one AI research tool on a low-risk summarization task

Week 3**Create Documentation Workflows**

- ☐ Set up a stage-based folder template for your next project
- ☐ Write your file-naming convention down and apply it consistently
- ☐ Build or update your master specification document
- ☐ Start a one-line decision log for your current active project

Week 4**Build a Repeatable Operating System**

- ☐ Complete the Workflow Audit Matrix for all six layers
- ☐ Set your weekly operating rhythm using the dashboard template
- ☐ Schedule your first quarterly system review three months out
- ☐ Capture one case-study-ready moment from a current project

TIP — Spread tasks across the week

Do not try to finish a whole week's tasks in one sitting. Spread them out — one task per day keeps the momentum without overwhelming your schedule.