

# SIMPLIFY SCOPE, FEE, CLAIM, CERTIFICATE

A PLAYBOOK FOR ARCHITECTS AND PROJECT MANAGERS

*17 skills. Two chains.*

*One afternoon, one Friday.*

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N°02 • FIELD GUIDE

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A PLAYBOOK FOR ARCHITECTS AND  
PROJECT MANAGERS

# Simplify Scope, Fee, Claim, Certificate

Two chains, run end to end. Nine skills take a messy brief to a proposal you can send. Nine take a month on site to a report you can sign. Every prompt is written out, and the whole set is free.

Written and edited with Claude. Claude is a trademark of Anthropic, PBC. This guide reflects the author’s independent assessment of the tools it describes and is provided as general guidance, not professional, legal or contractual advice.

WRITTEN BY CHIANG NING

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Field guide · No. 02



FIG. · WORKS IN PROGRESS

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17 skills,  
two chains of work.

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FOREWORD

Two chains, not two piles.

Two jobs eat an architect’s unpaid hours. Winning the work, and reporting on it once you have. The first is a weekend spent turning call notes into a fee proposal. The second is the Sunday before the monthly report is due, spent reconciling a claim against a schedule of values nobody has opened since March.

Neither is a single task, which is why a single prompt never fixed them. They are chains: each step needs the output of the one before it, in the right shape. That is what a **Skill** is for. It is a small folder of written instructions Claude loads when the task calls for it, so step four already knows what step three decided.

Nine skills carry a brief to a proposal. Nine carry a month on site to a signed report. One sits in both, which is why the count here is seventeen, not eighteen. Run them in order, and remember the rule: the skill does the reconciling and the typing. **You stay the author.**



FIG. · PHYSICAL STUDY MODELS

Simplify Scope, Fee, Claim, Certificate



FIG. · CONCRETE INSERT, URBAN INFILL

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HOW IT WORKS

# Four moves, every single time.

A skill is not an app. It is a small folder of written instructions Claude loads only when the task calls for it. That is the whole idea, and why a studio can share them like templates. In a chain, each skill is handed the output of the last.

RUN A SKILL

- 01

**DROP IN THE RAW MATERIAL**  
Call notes, a claim, a programme, a folder of site photos. Whatever you already have.
- 02

**NAME THE SKILL**  
One line in plain language, or type the slash command. The skill loads its own steps.
- 03

**ANSWER THE QUESTIONS**  
It asks only what it cannot infer, then shows its working.
- 04

**CHECK AND PASS IT ON**  
The output becomes the input of the next skill in the chain.

INSTALL & INVOKE

- 01

**ADD IT ONCE**  
Drop each skill folder into your skills directory, or upload the pack.
- 02

**CALL IT BY NAME**  
Mention it in plain language, or invoke it as /skill-name.
- 03

**REUSE AND ADAPT**  
Teach it your template and your rates once. Every future run inherits them.



FIG. · INTERIOR, STAIR AND COURT  
Simplify Scope, Fee, Claim, Certificate



FIG. · TEMPORARY WORKS, ARCHIVE FIT-OUT  
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BEFORE YOU BEGIN

Before you put  
Claude to work.

- 01

**KNOW YOUR PRACTICE’S POLICY**

Confirm how your office permits Claude to be used. Another team adopting it does not mean yours is cleared.
- 02

**CONTRACT DOCUMENTS ARE CLIENT DATA**

Claims, variations and delay notices are commercially sensitive and often contested. Be deliberate about which account they go into.
- 04

**DIFFERENT SURFACES, DIFFERENT RISK**

The chat apps are lower-risk. Claude Code acts on the files on your device, and some actions cannot be undone.
- 05

**KEEP BACKUPS**

Whenever Claude works with your real project files, keep a current backup. It is the simplest protection you have.

- 03

**ASSESSMENT IS NOT CERTIFICATION**

These skills structure a position for you to take. The certificate, the determination and the signature stay with the named person.

Get the safeguards right first;  
then go as far as your  
imagination will take you.



FIG. • TIMBER-FIN FACADE

Simplify Scope, Fee, Claim, Certificate



FIG. • PHYSICAL STUDY MODELS

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# A

## The Brief

A commission arrives as call notes, an email chain and a wishlist. Two skills turn that into a brief with the gaps named, before a fee is spoken aloud.

SKILL 01

PROPOSAL

Brief Builder

/brief-maker

Paste the call notes, the email chain, the address. Get a structured brief with scope, exclusions, assumptions and open questions.

It separates what the client asked for from what you are assuming, and refuses to invent the rest. Run it before a fee number is spoken aloud.

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THE PROMPT

Here is everything I have on [project]: call notes, the email thread, the site address, the client wishlist. Turn it into a project brief: summary, stakeholders, site and context, scope, explicit exclusions, assumptions flagged as assumptions, and open questions. Invent nothing.

GIVE

The raw brain dump, however messy.

GET

A structured brief with the gaps named.

TAKES 4 MIN

REPLACES A MORNING TURNING NOTES INTO A BRIEF

OPUS 5

CHECK

Every open question is a live item. Send them to the client before you price the job.



SKILL 02

PROPOSAL

Grill Me

/grill-me

Hand it the brief. It plays the demanding senior reviewer and asks until the scope has no soft edges left.

It questions one theme at a time, restates what changed, then comes back for another round. “We will sort that later” is recorded as a live risk, not a closed item.

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THE PROMPT

You are a demanding senior reviewer. Interrogate this brief until nothing is vague: site, programme, budget, planning, consultants, client decision-making, risk. Group the questions by theme, ask only what changes the design, the fee or the risk, and finish with the highest unresolved risk.

GIVE

The brief from skill 01.

GET

Themed questions and a risk read.

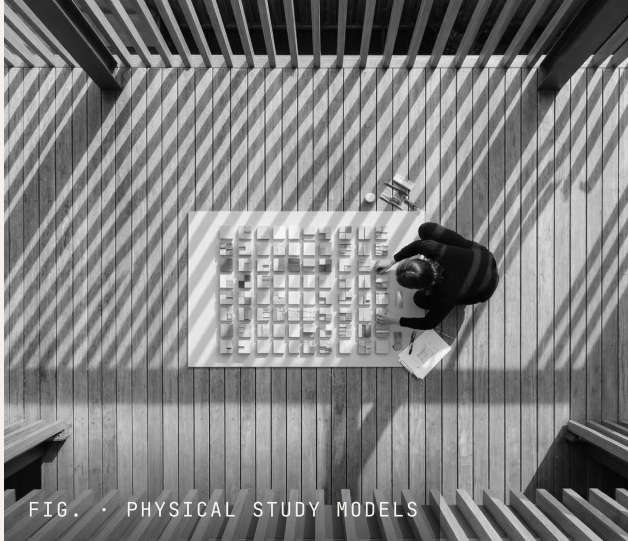
TAKES 10 MIN, IN ROUNDS

REPLACES THE REVIEW MEETING NOBODY HAD TIME TO BOOK

OPUS 5

CHECK

Answer it honestly. A brief that survives the grilling is the one you can safely price.





# Site & Options

What the site allows, and what the scheme could be. A first-pass planning read, then a set of massing directions wide enough to be worth comparing.

SKILL 03

PROPOSAL

# Site Check

/site-check

Give the address. Get zoning, overlays, height, setbacks and hazards as a first-pass read, with the place to verify every line.

It never states a control as fact. It separates what typically applies from what you must confirm, and names the clause or map to confirm it in.

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## THE PROMPT

First-pass planning read for [address], [jurisdiction]. Structure it as zone, overlays, height, setbacks, site coverage and plot ratio, parking, heritage, flood and bushfire, easements. For each: the first-pass read and exactly where I verify it. Flag anything that could stop the project.

## GIVE

An address, or a lot and plan number.

## GET

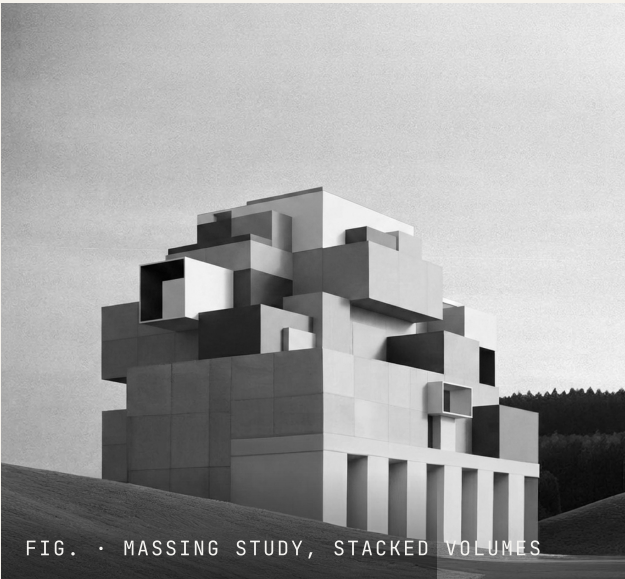
A constraints table plus red flags.

TAKES 5 MIN

REPLACES HALF A DAY OF PORTAL-HOPPING  
OPUS 5

## CHECK

A pre-check, never planning advice. The authority stays the source of truth.



SKILL 04

PROPOSAL

# Options

/massing

Feed it the brief and the constraints. Get four genuinely different massing strategies, each with its parti, efficiency and main risk.

It widens the option set before you anchor on the first idea, and structures the trade-offs so a client workshop has something real to compare. It does not choose the scheme.

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## THE PROMPT

From this brief and site-check, propose 4 genuinely different massing strategies for [project], not variations of one. For each: the parti, how it answers the site, rough net-to-gross, and its main risk. Finish with a comparison table and what to test next.

## GIVE

The brief and the site constraints.

## GET

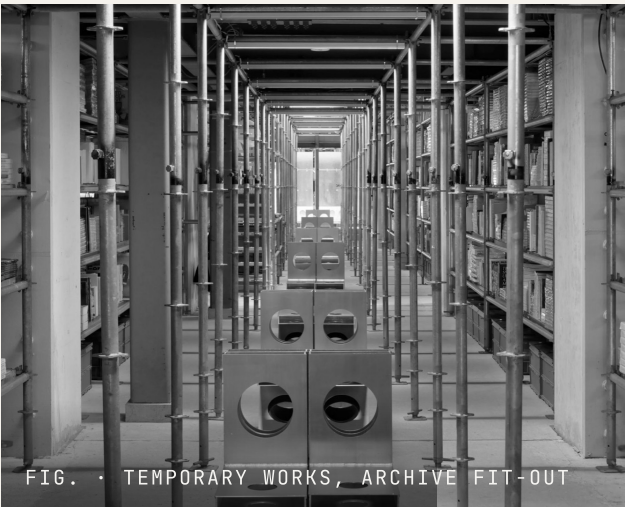
Distinct options, laid out side by side.

TAKES 6 MIN

REPLACES ARRIVING AT THE WORKSHOP WITH ONE  
IDEA  
OPUS 5

## CHECK

The site, planning and buildability calls stay with you. It widens the choice, it does not make it.





# Cost & Programme

The two numbers a client will test you on. A cost range you can argue with, and a programme with every approval gate pulled out into daylight.

SKILL 05

PROPOSAL

# Cost Sense

/qs-estimator

Feed the area schedule. Get a low, likely and high build cost with the rate and the assumption shown on every line.

It reasons elementally and prices preliminaries, contingency and escalation, so the number can be argued with rather than believed. It reports a range, never a single figure.

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## THE PROMPT

Here is the area schedule for [project] in [location]. Give an order-of-cost estimate: apply [my rates] per line, add preliminaries, contingency and escalation, and give low / likely / high. Show every assumption and exclusion, and tell me what would move the number most.

GIVE

A room schedule, or GFA by use.

GET

A cost range with the assumptions exposed.

TAKES 5 MIN

REPLACES A FEASIBILITY NUMBER GUESSED OVER COFFEE

OPUS 5

CHECK

Plus or minus 15 percent, and not a QS figure. Use your own rates or verify them locally.



FIG. · INTERIOR, STAIR AND COURT

SKILL 06

PROPOSAL

# Programme

/timeline

List the phases. Get a defensible programme with dependencies, the critical path, and every client approval gate dated.

It surfaces the approval gates as their own dated items, because late client decisions cause more slippage than slow work does. Table first, Gantt second.

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## THE PROMPT

Turn these phases into a programme for [project]: durations, dependencies and the critical path. Pull every client decision and authority approval out as its own dated gate with a lead time, and flag which durations are assumptions. Table first, then a Gantt.

GIVE

Phases, rough durations, any fixed dates.

GET

A programme with the gates exposed.

TAKES 4 MIN

REPLACES A BAR CHART YOU CANNOT DEFEND  
OPUS 5 / SONNET 5

CHECK

Localise the statutory durations before you print dates in a proposal.



FIG. · TIMBER-FIN FACADE



# D

## The Proposal

The last two moves before it goes. Your practice voice across the whole document, and a handoff so whoever runs the job starts where you finished.

SKILL 07

PROPOSAL

# Client Voice

/client-voice

Paste your own past writing. It rewrites the draft in your practice voice and strips the AI tells, without touching a fact.

It reads your register from real samples, then matches sentence length, formality and vocabulary. Facts, numbers and commitments stay exactly as approved.

THE PROMPT

Here are three samples of our own writing. Rewrite this proposal to match our voice: sentence length, formality, how we open and close. Change no facts, no numbers, no commitments. Strip the AI tells. Australian English. Tell me what you changed in tone.

GIVE

Your writing samples and the draft.

GET

The same content, in your voice.

TAKES 3 MIN

REPLACES A DOCUMENT THAT READS LIKE EVERYONE ELSE'S

OPUS 5

CHECK

Read it once for facts. A language pass should never move a number.



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SKILL 08

PROPOSAL

# Hand Off

/handoff

Close the run. Get a handoff with decisions, open items, assumptions and the single next action, so the PM starts sharp.

It separates decided from open and labels every assumption, so the receiver can challenge it rather than inherit it. It is also how a long chat survives being closed.

THE PROMPT

Write the handoff for [project] at [stage]: decisions made, with the reasoning behind the non-obvious ones; open items with an owner each; assumptions and risks labelled as such; and the single most important next action, stated first.

GIVE

The project or session state.

GET

A handoff nobody needs explained.

TAKES 3 MIN

REPLACES A VERBAL BRIEFING FORGOTTEN BY FRIDAY

OPUS 5 / SONNET 5

CHECK

Nothing assumed may be handed over as a fact. Label it, so it can be challenged.



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# The Month Assessed

The month lands as a claim, a stack of variations and a delay notice. Four skills test each one on its own terms, before any of it reaches the report.

SKILL 09

REPORT

# Claim Check

/claim-check

Drop the contractor's claim. Every claimed percentage is tested against the schedule of values, and the over-claims are flagged.

It reads the claim line by line against the agreed values, and reports the delta rather than the total. The certification stays yours.

[chiangning.net/resources](#)

## THE PROMPT

Assess this progress claim against the schedule of values and the contract. Test every claimed percentage line by line, show claimed against assessed, flag the over-claims with the evidence I would need to refuse them, and total the difference.

GIVE

The claim and the schedule of values.

GET

A line-by-line assessment and the delta.

TAKES 10 MIN

REPLACES AN EVENING WITH TWO SPREADSHEETS SIDE BY SIDE

OPUS 5

CHECK

It assesses, you certify. Walk the site before you sign the number.

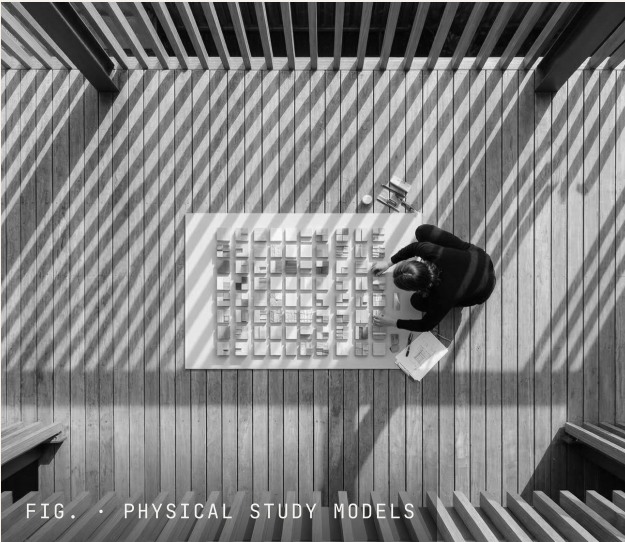


FIG. · PHYSICAL STUDY MODELS

SKILL 10

REPORT

# Variation Log

/variation-log

Feed the variation claims. Each is logged against the clause it relies on, with its cost and time impact tagged.

It ties each variation to the clause it relies on and tests whether notice was served in time, which is usually what the argument turns out to be about.

[chiangning.net/resources](#)

## THE PROMPT

Log these variations against the contract: for each, the instruction or event that triggered it, the clause relied on, the cost impact, the time impact, the status, and whether notice was given inside the contractual time bar.

GIVE

The variation claims and the contract.

GET

A register with clause, cost, time and status.

TAKES 8 MIN

REPLACES A REGISTER UPDATED FROM MEMORY

OPUS 5

CHECK

Notice timing usually decides entitlement. Confirm every date against the correspondence.

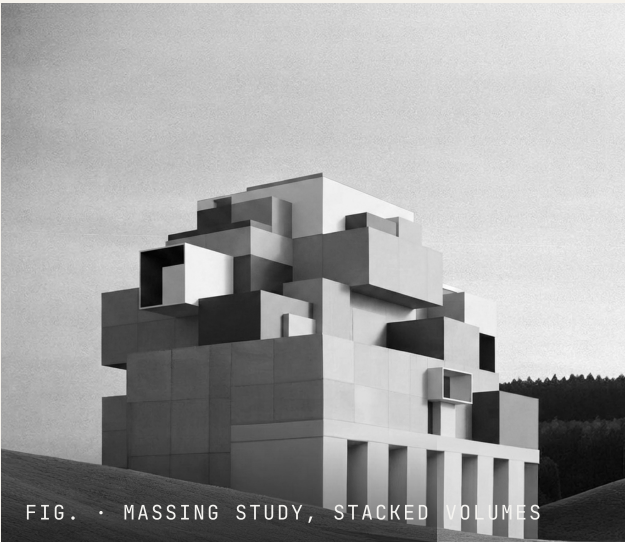


FIG. · MASSING STUDY, STACKED VOLUMES

SKILL 11

REPORT

# EOT Check

/eot-check

Test the delay notice against the programme. It asks whether the critical path was really hit, and by how many days.

It separates the days claimed from the days that actually moved practical completion, and names the concurrent delay. Most claims shrink at this step.

[chiangning.net/resources](#)

## THE PROMPT

Test this extension of time claim against the approved programme. Which of the claimed days actually sit on the critical path? Identify concurrent delay, check the notice against the contract time bar, and give an assessed EOT with your reasoning.

GIVE

The delay notice and the programme.

GET

An assessed EOT you can explain.

TAKES 10 MIN

REPLACES TAKING THE CLAIMED DAYS AT FACE VALUE

OPUS 5

CHECK

Contentious ground. Have the assessment reviewed before it becomes a determination.

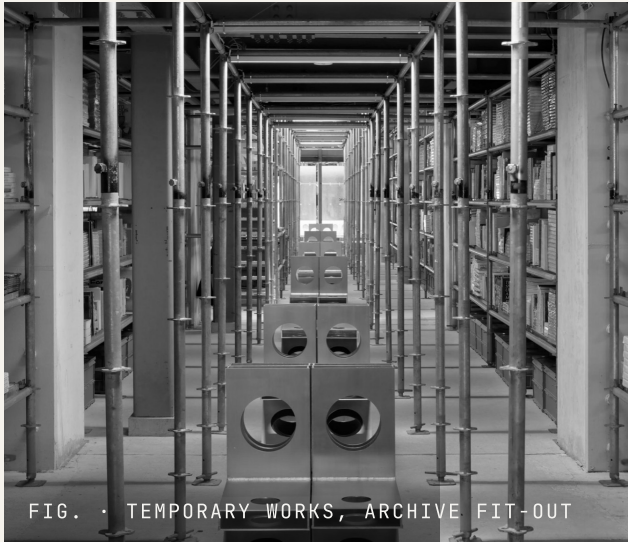


FIG. · TEMPORARY WORKS, ARCHIVE FIT-OUT

SKILL 12

REPORT

# Cost Report

/cost-report

Roll the assessed claim and the variations into budget against committed against forecast, on one page.

It reconciles the month into the three numbers a client actually asks about, and shows where the forecast moved and why. One page, or it does not get read.

[chiangning.net/resources](#)

## THE PROMPT

Build the cost report for [project] this month: budget, committed, spent to date, forecast final cost. Fold in the assessed claim and the variation register, show the movement since last month with a reason for each, and flag any forecast overrun.

GIVE

The assessed claim and the variation log.

GET

A one-page cost position, with movement.

TAKES 6 MIN

REPLACES REBUILDING THE SAME SPREADSHEET EVERY MONTH

OPUS 5

CHECK

Reconcile the totals against your accounting system before the client sees them.



FIG. · INTERIOR, STAIR AND COURT

F

# The Report Written

Programme, risks, photographs, and the document itself. Five skills that turn an assessed month into a report you can sign on a Friday afternoon.

SKILL 13

REPORT

# Programme Update

/programme-update

**Update the Gantt, mark the slippage, and forecast a completion date you can defend in the meeting.**

It works from the approved programme rather than a fresh one, so the movement stays visible. The companion to skill 06, later in the same project's life.

[chiangning.net/resources](#)

THE PROMPT

Update the programme for [project] with this month's progress: actual against planned per activity, the slippage, a recalculated critical path, and a forecast practical completion date with the reasons it moved.

GIVE

The approved programme and progress.

GET

An updated Gantt and a defensible date.

TAKES 6 MIN

REPLACES REDRAWING THE BAR CHART BY HAND

OPUS 5

CHECK

Agree percentage complete with the site team before that date goes into the report.



SKILL 14

REPORT

# Risk Log

/risk-log

**Pull every open risk, RFI and issue into one register, with an owner and a date on each line.**

It sweeps the month's correspondence into a single list and sorts by what is blocking work. Overdue items are named, not softened.

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THE PROMPT

Build this month's risk and issue register from these RFIs, minutes and emails: item, description, owner, date raised, days open, impact on cost or programme, status. Sort by what is blocking work, and list the overdue items separately.

GIVE

RFIs, minutes and correspondence.

GET

One register, sorted by what blocks work.

TAKES 6 MIN

REPLACES THREE LISTS THAT DISAGREE WITH EACH OTHER

OPUS 5 / SONNET 5

CHECK

A risk with no owner and no date is not tracked. Fill both before you issue.



SKILL 15

REPORT

# Site Log

/site-log

Upload the month’s photos. Get them captioned, sorted by trade, and written up as the story behind the numbers.

It turns a camera roll into a record: what the photo shows, which trade, which area, what it evidences. The section clients read first.

[chiangning.net/resources](#)

## THE PROMPT

Here are this month’s site photos. Caption each with the trade, the area and what it evidences, sort them by trade, and write a short progress narrative that matches the percentages in the claim assessment.

## GIVE

The month’s photos, unsorted.

## GET

A captioned, ordered site record.

TAKES 5 MIN

REPLACES A FOLDER OF UNTITLED JPEGS

OPUS 5 · VISION

## CHECK

Check each caption against the site diary. A wrong area on a photo is a wrong record.



SKILL 16

REPORT

# Report Writer

/report-writer

Assemble every section into the monthly report, in your house format and your voice, ready to sign.

It takes the outputs of the six skills before it and assembles the document, rather than starting a new one. Same template, same order, every month.

[chiangning.net/resources](#)

## THE PROMPT

Assemble the monthly report for [project] from these sections: claim assessment, variation register, EOT assessment, cost report, programme update, risk register and site log. Use our template and section order, write the executive summary last, and keep every number consistent with its source section.

## GIVE

The outputs of skills 09 to 15.

## GET

The monthly report, in your format.

TAKES 8 MIN

REPLACES A SUNDAY

OPUS 5

## CHECK

Read the executive summary back against the registers. Your signature is the last control.



SKILL 17

BOTH

# Write a Skill

/write-a-skill

**Bottle the run. It turns the workflow you just did by hand into a SKILL.md, so next time it is one command.**

The only skill standing in both chains, and the reason the count is seventeen rather than eighteen. Run it the first time you finish something you know you will repeat.

[chiangning.net/resources](#) ↗

## THE PROMPT

We just ran [the fee proposal / the monthly report] end to end. Package it as a Claude Skill: YAML frontmatter with a kebab-case name and a description saying what it does and when to use it, then What it does, When to use, Instructions, Output format, and the one mistake to avoid.

## GIVE

The workflow you just finished.

## GET

A ready-to-save SKILL.md.

## TAKES 3 MIN

REPLACES RE-EXPLAINING YOURSELF NEXT

MONTH

OPUS 5

## CHECK

A vague description will not trigger. Say plainly when the skill should load.



WORKED EXAMPLE

One afternoon,  
and one Friday.

No single skill wins a job or closes a month. A chain of them does, each one handed the output of the last. Run in order, the first chain fills an afternoon and the second fits inside a Friday.

[chiangning.net/resources](http://chiangning.net/resources)

CHAIN ONE · BRIEF TO PROPOSAL

01  
**CAPTURE · /BRIEF-MAKER → /GRILL-ME**  
Notes become a brief, then the brief is interrogated until the scope has no soft edges left.

02  
**TEST · /SITE-CHECK → /MASSING**  
What the site allows, then four schemes worth comparing against it.

03  
**PRICE · /QS-ESTIMATOR → /TIMELINE**  
A cost range you can argue with, and a programme with the approval gates dated.

04  
**SHIP · /CLIENT-VOICE → /HANDOFF**  
Your voice across the document, and a handoff so the PM starts where you stopped.

CHAIN TWO · MONTH TO REPORT

01  
**ASSESS · /CLAIM-CHECK → /VARIATION-LOG**  
Every claimed percentage tested against the values, every variation tied to its clause.

02  
**DEFEND · /EOT-CHECK → /COST-REPORT**  
The delay claim measured against the critical path, then the month priced on one page.

03  
**RECORD · /PROGRAMME-UPDATE → /RISK-LOG → /SITE-LOG**  
Slippage, open items, and the month's photographs captioned and ordered.

04  
**ISSUE · /REPORT-WRITER → /WRITE-A-SKILL**  
The report assembled in your format, then the whole run bottled for next month.



FIG. · MASSING STUDY, STACKED VOLUMES



FIG. · WORKS IN PROGRESS

THE RULE

You stay the author.

01  
IT DRAFTS, YOU DECIDE

Every output is a first draft, never a final answer. Nothing leaves the office without your name reading it first.

02  
ASK IT TO SHOW ITS WORKING

If you cannot see how it reached a number, you cannot defend it across the table. Trust the reasoning, not the confidence.

03  
KEEP THE JUDGEMENT IN HOUSE

It does the reconciling and the typing. The design call, the risk call, the certification and the client call stay yours.

FREE  
Get the skill pack.

All 17 skills, both chains, every prompt written out and ready to drop in. Take the pack, keep the weekend.

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FIG. · TEMPORARY WORKS, ARCHIVE FIT-OUT



FIG. · CONCRETE INSERT, URBAN INFILL