

Talk Their Language — Present Workplans From Your Client's Perspective

by Michael Strogoff, AIA

How do you . . . communicate effectively that your work plan is based on client benefit.

Summary: When asked to submit a workplan as part of a proposal or to itemize projected person-hours to support proposed fees, few design professionals craft this information with their clients' viewpoint in mind. Instead, most design professionals develop workplans and task lists as though they were talking to other design professionals. They describe tasks in one of three ways: in technical terms (e.g., "conduct a dynamic seismic analysis"), as simple tasks with no apparent client benefits ("develop interior building details") or as deliverables ("submit revised space summary"). These types of descriptions do little to persuade clients to select your firm or reach agreement on proposed fees.

To turn workplans and task lists into convincing marketing and negotiating tools, design professionals must present tasks from a client's perspective. Rather than simply stating "Develop revised opinion of probable construction costs" (see example 1 on page 7), start by creating different categories that describe the goal of each set of tasks, and then list the major tasks within each category (see example 2). Phrase each task description so that an owner understands the benefits he or she will likely receive by paying for that task. For example, "Client worksession to identify possible bid alternates, funding increment and cost reduction strategies" is far more compelling than "Document bid alternates." Also, identify tasks that necessitate the owner's involvement, such as "Conduct value-engineering session with owner, user representatives and key engineering consultants." This enables clients to better understand the process and how, when and to what extent their involvement or input is required.

A client-focused workplan also:

- **Leads to more realistic projected hours and higher fees.** By itemizing activities in greater detail as part of their selling tactics, design professionals foresee more of the tasks needed to complete their services and deliver a superior project. As a result, they also include hours more commensurate with the actual effort required, which usually translates into higher fees.
- **Educates an owner about the design and delivery process.** For example, a task such as "Identify possible construction phasing alternatives and their impact on the project schedule and construction costs" might prompt a discussion with an owner about the different levels of effort associated with various phasing options. This might, in turn, lead to an early agreement on a simplified phasing strategy, thereby reducing the A/E team's efforts, or convince the owner to pay higher fees because he or she understands the additional effort associated with more complex phasing.
- **Makes an owner aware of the implications of scope reductions.** Linking a design professional's tasks to owner benefits forces owners to consider the disadvantages of eliminating that task. For example, an owner will think twice before agreeing to eliminate a 4 hour task such as "Analyze anticipated market conditions and their likely impact on bid prices, and identify appropriate contingencies" whereas the same owner might not hesitate to ask for a 4 hour reduction on a task simply labeled "Revise schematic design cost estimate to bring construction costs within budget." At the least, linking tasks to benefits encourages an owner to make a deliberate choice before agreeing to scope and fee reductions.

- **Facilitates effective project management and aligns assumptions.** A complete and well-thought out task list serves as an essential part of a roadmap for implementing a project. Project participants — owner, design professionals, consultants and other stakeholders — better understand their respective responsibilities and less activities fall through the cracks. And by identifying tasks on the critical path and specifying timelines for those tasks, the owner and the design professional can more effectively manage the project schedule.

Workplan From an A/E Team's Perspective

• Develop exterior elevations	32 hours
• Develop building sections	24 hours
• Interior building details	48 hours
• Revise site plan	8 hours
• Develop revised opinion of probable construction costs	12 hours
• Document bid alternates	6 hours
• Value-engineering session	6 hours
• Submit DD plans to agencies	4 hours

Workplan From a Client's Perspective

Construction Cost Management Activities

• Itemize changes from schematic design opinion of probable costs	2 hours
• Obtain input from local contractors and subcontractors	4 hours
• Analyze anticipated market conditions and their likely impact on bid prices, identify appropriate contingencies	2 hours
• Develop revised opinion of probable construction costs, review with Owner	6 hours
• Develop cost reduction opportunities including scope changes, building systems & construction phasing	6 hours
• Compare costs against other facilities	2 hours
• Client worksession to identify possible bid alternates, funding increment and cost reduction strategies	4 hours
• Conduct value-engineering session with owner, user representatives and key engineering consultants	6 hours
• Analyze cost/benefit of VE options, recommend options to incorporate	4 hours
Subtotal - Cost Management Activities:	38 hours

Constructability and Code Review

• Conduct preliminary plan check meetings with approving agencies	4 hours
• Discuss possible variances with Owner	4 hours

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