



Practice Management Digest

News & Best Practices from the PM Knowledge Community

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Features

Be Quality

by Cyndi Laurin, PhD

This article details the steps and guiding principles for achieving organizational greatness. In response to the oft-asked question "What constitutes organizational greatness?" management expert Cyndi Laurin developed a litmus test of sorts to qualify those organizations demonstrating greatness and simply being quality.

- First, they have an extraordinary product and/or service.
- Second, all employees are treated impeccably well.
- And lastly, they must have an expansive vision that goes beyond the boundaries of the organization.

> [Read the full article](#)

Use a Personal Brand to Expand Your Corporate Success

by Ron Wolf, J. Philip Associates, Inc.

Managing your career means managing your brand. Your brand is a visceral image of why you're better, stronger, and more qualified than anyone else in the game. You will have to make choices. But take a cue from advertisers who know consumers struggle to hold more than one thought about a product at a time. What is the one thought you would like held about you? Questions to ask yourself:

- What have I done that I'm most proud of?
- Where do I add the most value?
- What do I do better than anyone else?
- When am I at my best?
- What are my values, interests, and life goals?
- What do my accomplishments have in common?
- What are my weaknesses and how do I compensate for them?
- How do I think others perceive me?

A high-impact personal brand will do more for your career than a resume ever could. Instead of representing a common commodity (i.e., marketing executive), you've launched yourself beyond the reach of the competition by letting employers and the industry know what specifically it is you do that makes a difference.

> [Read the full article](#)

Service Versus Services (The Value-Added Factor)

by Steve L. Wintner, AIA

For years architects have been looking for ways to justify their fees and hourly rates to their clients. It may just be that this "justification" posture is the obstacle to achieving their goal of higher fees. Instead, more energy could be expended in improving our communication skills, especially our listening skills. We need to take the time to understand our clients' needs and concerns and then educate them about the value-added aspects of our service. Please note the deliberate use of the word "service," instead of services.

> [Read the full article](#)

Leadership and Management: A Methodology from the Trenches

by John L. Capelli, AIA

Firms today spend a lot of time on accepted core fundamentals of project management. What I find lacking in this discourse, particularly concerning the grooming of future project managers, is the need to ensure successful

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outcomes by paying attention to the relationship of our tools, the brand promise, and the level of client sophistication.

When mentoring a rising architect into the PM position, I try to emphasize the need to become a student of leadership. This enables a young architect to simultaneously begin to understand that there is a distinction between leadership and management activities. People tend to construe being organized and efficient as leadership, yet that is not the case. Leaders, in addition to be visionaries, generate such energy that people are attracted to them. Managers write the road map to execute the vision.

> [Read the full article](#)

PODCASTS

[Click here](#) to download the following AIA Practice Management podcasts.

Ownership and Leadership Transitions

Michael Strogoff, AIA, discusses key issues architecture firms should consider when implementing an ownership and leadership transition plan. Topics include: what to look for when identifying future leaders; what prospective owners need to consider; and how to ensure that transitions are successful after you leave. Michael also provides valuable guidelines for successful mergers and acquisitions.

Train, Retain, and Transfer Project Knowledge

Cliff S. Moser, AIA, MSQA, principal, Healthcare Los Angeles Studio, RTKL Associates Inc., and Practice Management Advisory Group member explains how to train, retain, and transfer project skills and knowledge using concepts from the WWII program, Training Within Industry. Also detailed is the use of Lean Enterprise Strategies in architecture (downloadable forms available via [Read More link](#)).

News

How Can I Share My Knowledge?

[Contributions to AIA Best Practices](#) are welcome at any time and in any form. Completed articles are preferred, but ideas and knowledge are most important. If the topic is worthwhile, we will work with you to develop even the barest outline of an idea. Suggestions for topics are also welcome.

We strongly encourage submissions by practicing professionals, allied professionals, strategic partners, and industry consultants. To encourage contributions, there are no submission forms and no submission deadlines. The only criteria are that articles consist of knowledge gained from experience, immediately applicable to a task at hand.

If you have developed a practice you would like to share with your colleagues or have encountered a situation in which the knowledge of others would be of value to you, write to us at bestpractices@aia.org.

PMKC Events at the 2007 AIA Convention & Design Exposition

Are you a bit overwhelmed by your review of the 2007 AIA Convention Program? Below are the sessions that feature practice management issues.

To register for any of the sessions, please visit the [AIA Convention Web site](#).

WORKSHOP SESSIONS

WE06 Managing Clients' Expectations

Wednesday, May 2, 8:00 a.m. to 12:00 p.m.

3.75 LUs Intermediate to advanced level

Learning Objectives

- Identify and align measures of success from your clients' and your firm's perspectives
- Demonstrate effective management of clients who have unrealistic expectations or make unreasonable demands
- Identify useful techniques and tools for conducting effective client meetings, keeping clients informed, communicating with challenging personalities, interacting with a client's representative, and managing your risks

David A. Ericksen, Severson & Werson, San Francisco
Michael Strogoff, AIA, Strogoff Consulting, Mill Valley, CA

WE09 Little Workshop of Horrors: An In-Depth Analysis of Claims that Threaten Architects

Wednesday, May 2, 8:00 a.m. to 12:00 p.m.

Meets AIA/CES criteria for Health, Safety, and Welfare (HSW) issues
Recommended for Young Architects
3.75 LUs Intermediate to advanced level

Learning Objectives

- Identify problem prone legal issues and risk conditions in your projects
- Establish preventive measures within a delivery process
- Use protective risk management clauses in contracts

James B. Atkins, FAIA, HKS Architects, Dallas
Grant A. Simpson, FAIA, RTKL Associates Inc., Dallas
Hollye C. Fisk, Esq., FAIA, Fisk & Fielder, PC, Dallas
R. Craig Williams, AIA, HKS Architects Inc., Dallas

WE43 Financial Management: The Path to Profitability

Wednesday, May 2, 1:00 to 5:00 p.m.

3.75 LUs Intermediate level

Learning Objectives

- Develop an annual budget and profit plan; establish the hourly break-even rate and billing rate for all firm employees
- Establish project fees based on value-added service to the client, not just time-to-complete compensation, leading to a fee negotiating strategy that ensures a win-win outcome every time
- Set up, interpret, and evaluate financial reports (profit and loss statement and balance sheet); determine how to balance between project workload and staff size; manage overhead expenses to enhance profitability; and calculate the six financial performance indicators

Steve L. Wintner, Management Consulting Services, The Woodlands, TX

WE37 Focus on Construction Drawings: Innovative Project Delivery Methodologies

Wednesday, May 2, 1:00 to 5:00 p.m.

Meets AIA/CES criteria for Health, Safety, and Welfare (HSW) issues
Recommended for Young Architects
3.75 LUs Intermediate level

Learning Objectives

- Implement progressive documentation methodologies that improve drawing production efficiency and quality with reduced effort
- Approach and deliver projects from a strategic perspective
- Discuss the fundamentals of good construction drawing management and the importance firm processes

Michael F. Czap, AIA, RTKL Associates Inc., Dallas
Alan L. Mays, AIA, RTKL Associates Inc., Los Angeles
Grant A. Simpson, FAIA, RTKL Associates Inc., Dallas

WE41 Managing Design: An Oxymoron for the Ages?

Wednesday, May 2, 1:00 to 5:00 p.m.

3.75 LUs Intermediate to advanced level

Learning Objectives

- Determine the design management style that is right for your firm
- Improve relationships between the managers and designers of your firm
- Improve your firm's ability to create designers that are "on target" with your market area and meet design leaders representing a variety of practices and design philosophies

Steven Ehrlich, FAIA, Steven Ehrlich Architects, Culver City, CA
Andrea Cohen Gehring, FAIA, LEED AP, WWCOT, Santa Monica, CA
David Lake, FAIA, Lake|Flato Architects, San Antonio
Carl D. Roehling, FAIA, SmithGroup, Detroit

TH55 Beyond Redlines: Creating a Practice-Based QM Program
Thursday, May 3, 6:00 to 7:00 p.m.

Recommended for Young Architects
1 LU Entry to advanced level

Learning Objectives

- Summarize the history of quality science and quality management (QM) and determine how it is different from traditional quality assurance and quality control and how it focuses on all aspects of the organization
- Create and implement a QM program that is appropriate for the size and business practice of your organization
- Diffuse a QM program through the firm's value stream internally, including administrative and senior management staff and consultants, and externally, including contractors, agencies, and clients

Cliff S. Moser, AIA, LEED AP, RTKL Associates, Architects, Los Angeles

SA26 Professional Practice in the 21st Century
Saturday, May 5, 11:30 a.m. to 1:00 p.m.

1 LU Entry to advanced level

Learning Objectives

- Evaluate the integrated practice approach, which leverages knowledge through the use of new technologies and expands the value of architects throughout the project lifecycle
- Discuss this emergent change to practice, project delivery, and the required business models to accommodate the change in practice
- Identify the emerging trends in technology and marketing within the professional practice of architecture

James P. Cramer, Hon. AIA, IIDA, The Greenway Group, Atlanta
James Sawyer, AIA, Perkins Eastman Architects, PC, Brooklyn, NY

WE01 Integrated Practice: Putting It All Together
Wednesday, May 2, 7:15 a.m. to 6:15 p.m.

Up to 7.5 LUs-Entry to advanced level

Join the AIA National Integrated Practice Discussion Group and a range of industry leaders for a series of seminars, presentations, panel discussions and open forums addressing topics relevant to Integrated Practice. Attendees may pick and choose sessions between tracks as they wish during the event. Three 60 minute plenary sessions will cover topics crossing all interest groups. Please join us for this exciting event.



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Be Quality

By Cyndi Laurin, PhD

Our ancestors used survival as the basis for determining success, constantly reading the environment and responding to it, which over time led to an automatic triggering into action. It might have looked something like, "See lion...RUN!" In today's business world, we continue using the same approach—each responding to our world via external signals, and jumping into action before our interpretation of what is happening reaches our consciousness. In an organization, this becomes quite complicated as our varying perceptions of these external signals limit our ability to forge cohesive, high-performing teams.

Organizational greatness exists. I have been fortunate enough to work with some renegade organizations generating their own distinct paths to greatness. They are recognizable from the time you enter their office or facility. You can see it, feel it, hear it in the language being used, and quickly recognize that their secret to success is interwoven into the fabric of their very being. Everyone just seems to really "get it," and their financial metrics reflect greatness as well.

I am often asked, "What constitutes organizational greatness?" and have had several companies inquire to my willingness to tell their story as I did with the Fish Market. I developed a litmus test of sorts to qualify those organizations demonstrating greatness and simply being quality.

First, they have an extraordinary product and/or service. I know if that is in place, there is a solid infrastructure supporting the quality of product or service. It may include a problem-solving strategy (like TRIZ), integrated and continuous process improvement strategies, and a clearly defined performance-management plan that is aligned with every other aspect of business.

Second, all employees are treated impeccably well. It is one thing to have an extraordinary product or service, but if people within the organization are treated poorly (or there are unaccounted turnover or morale issues), it indicates symptoms of problems in the performance management realm. Happy employees tend to be an outcome of leadership creating an environment where workers are allowed to generate success and are not afraid to take risks.

And lastly, they must have an expansive vision that goes beyond the boundaries of the organization. I am not referring to community service, although I find that to be highly respectable and necessary in today's world. The type of expansive vision I am referring to tells me that all who work within the organization see themselves—and the organization itself—as part of something bigger than the products produced or the services rendered.

There are many organizations operating in mediocrity, searching for the proverbial silver bullet that will alleviate their quality woes, grow their teams, or increase market share. They create goals of grandeur without ever truly recognizing what it looks like when they get there. They start doing many activities and investing huge amounts of resources into quality initiatives and management develop programs and never have a conversation around what it means to achieve greatness.

I find most organizations are doing a great job of doing quality without recognition of what it means to simply be quality. To be quality, it is immersed and integrated into the thinking of every person affiliated with the organization, including suppliers and customers. Senior leaders and workers are not spending time and resources trying to figure out how to do it or what the next tool is they need to hire a consultant to implement—because it becomes who they are, the "what to do" to get there comes quite naturally.

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The actions and behaviors become a reflection of the collective thinking of the organization. An organization that thinks well together performs well together—and the results are simply the outcome of better thinking and behaviors aligned to that thinking.

Unfortunately, most senior leaders of organizations have not figured out that they cannot emulate the greatness of another organization by simply copying the practices or doing what the other is doing. Greatness requires delving into deeper waters to discover guiding principles within their own collective thinking that drive the actions and behaviors that allow extraordinary results. It requires new thinking that becomes the basis of the habits we automatically deploy. Quite simply, thinking about thinking results in long-term, sustainable results! Greatness is generated by every individual every day in every transaction between people and the processes they manage. I urge senior leaders to stop doing quality and start being quality from the inside out.

Cyndi Laurin, PhD, the author of Catch! A Fishmonger's Guide to Greatness and founder of Guide to Greatness LLC, lives in Arizona and can be reached at cyndi@guidetogreatness.com.



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Use a Personal Brand to Expand Your Corporate Success

by Ron Wolf, J. Philip Associates, Inc.

As a member of the management team, or maybe even because of a stint in marketing, chances are you're already something of a branding expert. As a general rule, those in the A&E world are not aware of the challenges and payoffs that come with branding a company or product and having it resonate in the minds of consumers. We find now, in an increasingly competitive labor market, some major lessons from marketing are critical to your career: have you thought of extending the same energy toward capturing—and promoting—your personal brand?

To demonstrate the power of a personal brand, think Donald Trump, Bill Gates, Oprah Winfrey, or even Paris Hilton. People have an immediate sense of knowing them. When we think Oprah, we think warmth and tears and overcoming adversity. Gates brings to mind gadgets, geeks, and philanthropy. The Donald conjures up ostentatiousness, ego, and a decisive ruthlessness. As for Paris, well, perhaps it's best we not go there...

Each of these individuals maintains a strong personal brand that's instantly recognizable. Can you say the same? If you had to look for work tomorrow, would your brand precede you? If just stating your name doesn't conjure for others impressions of leadership, accountability, innovativeness, or whatever other traits you wish to be known for, better start branding.

Experience Isn't Enough

People buy products they know, trust, and need. Companies and boards seek CEOs in much the same way. In today's fast-paced global world of executive turnover, experience alone is no longer enough of a selling point.

Curtis Moody, president of Moody-Nolan, Inc., Ohio's largest architecture/engineering firm, notes, "When you get to a certain level, there's a short list of firms. We're all qualified, we all have awards under our belt, we all have senior people, and we all have talent."

Moody goes on to state that what further differentiates firms in a client's mind is the level of passion brought to the table. The same applies to the search for a top executive. You've amassed an impressive resume and list of accomplishments, but so has everyone else you're competing with. On a level playing field, what makes you stand out?

Your Reputation is Yours to Brand

A brand is your unique promise of what makes you different. It is passion brought to the table. A powerful personal brand shapes not only how others see you, but even how you perceive yourself. But building a personal brand involves more than stating, "I'm a 'tell-it-like-it-is' leader" and posting that on a plaque outside your office. Instead, drilling down to the core of your branding strategy involves time, self-examination, accountability, as well as a solicitation of the others opinions.

Don't confuse your brand with your reputation. A well-executed personal brand will bolster and support your reputation. But reputations are malleable and, depending on company and stock performance, your reputation as a leader may be hailed one day and maligned the next. A reputation is only sometimes indicative of one's true self. A personal brand, however, will always reflect core values

"Character is like a tree and reputation its shadow. The shadow is what we think it is; the tree is the real thing."

—Abraham Lincoln

Identifying Your Personal Brand

International branding experts Bill Schley & Carl Nichols, Jr., authors of *Why Johnny Can't Brand: Rediscovering the Lost Art of the Big Idea* (Portfolio Hardcover, 2005), advise building your brand around a Dominant Selling Idea (DSI). Your DSI focuses on a single, mesmerizing "motivating difference" about you that comes to mind when someone speaks your name.

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For example, say “Volvo” and people automatically think “safe.” That’s an example of a strong DSI. Volvo automobiles may have a lot of other features going for them, but Volvo sticks with one dominant idea—our cars are safe. Other cars may be safe, but Volvo—through consistent marketing—owns the claim to being #1 in that category.

The fusion of your name and a #1 specialty in employers and employees minds builds recognition and loyalty for your work. Look to the obvious. What is it about your work and character that makes a “motivating difference?” Forget your job title. What is it about you that matters?

Let’s look at some examples of how a CFO might position himself/herself in the market:

EXAMPLE 1

Bob Smith offers over twenty years experience in managing the finances of Fortune 500 companies, including but not limited to overseeing accounting, budget, tax, and audit activities to drive business positions to improve cash flow.

Yawn. Bob may be well-qualified, but is there anything there that makes you sit up and take notice? We could insert any CFO’s name in Bob’s place with no discernable difference. Now compare with the version below.

EXAMPLE 2

John Jones is the #1 turnaround expert able to quickly identify hidden values in the assets of small to mid-size companies that have filed for bankruptcy and have been unable to restructure.

If a mid-size company is struggling and looking to restructure, both Bob and John may have the qualifications to lead them. But who do you think the company will look to —“Twenty years experience” Bob or “the #1 turnaround expert for small to mid-size companies”?

Hearing someone is the “#1 turnaround expert” ignites curiosity. We immediately form ideas about what type of traits such a high-performing turnaround expert must possess. (The catch, of course, is that you must have the credentials and personal attributes to back up your claim—see authenticity).

If you’re concerned promoting one of your traits above all others will pigeonhole you, don’t be. Promoting a specific attribute such as being “the #1 turnaround expert for small to mid-size companies” doesn’t mean your other qualities and qualifications won’t come to light, or that you might not be recruited to restructure a large company. A brand is simply what gets you noticed. Convince people you excel in one area and they’ll make the mental leap that you excel in others.

For example, not everyone who ships with Fedex cares that their package gets there “absolutely, positively overnight.” Some people just want a good, reliable service and assume if a company can get it there overnight, they can be trusted to get it there in three days as well. When you succeed in establishing yourself as #1 in a niche, employers will be motivated to then look at the whole you.

Authenticity: The Key to Brand Buy-In

Brand dissemination comes from employer/employee buy-in. You may see yourself as a collaborator or visionary but if those around you don’t see it that way, you’ll have a hard time making the brand stick.

Schley and Nichols outline an 8-week program to find and test a brand with staying power. Soliciting feedback from others is a vital part of this process. Others must see your personal brand as authentic. Feedback is essential as others may see a motivating difference in you that you didn’t identify in yourself. Listen to what others have to say, even if you’re not sure you agree with them.

And remember that your #1 trait or specialty doesn’t always have to be “good.” Maybe you are one tough bear known for running rampant over the opinions of others. But if those characteristics have allowed you to turn around floundering corporations operating with no clear sense of purpose or leadership, run with them. What matters is you’re clear on how the trait or specialty you’re proposing holds value for an organization. Questions to ask yourself include:

- What have I done that I’m most proud of?
- Where do I add the most value?
- What do I do better than anyone else?
- When am I at my best?
- What are my values, interests, and life goals?
- What do my accomplishments have in common?
- What are my weaknesses and how do I compensate for them?

- How do I think others perceive me?

When you think you have your answers, check them against people's perceptions. The goal is to generate brand awareness and loyalty. One without the other is no good.

A Brand New You

Managing your career means managing your brand. Your brand is a visceral image of why you're better, stronger, and more qualified than anyone else in the game. You will have to make choices. It's human nature to want to list every competitive advantage we have to offer. But take a cue from advertisers who know consumers struggle to hold more than one thought about a product at a time. Volvo built a reputation on the idea of safety. It's the one thought consumers' hold about them. What is the one thought you would like held about you?

A high-impact personal brand will do more for your career than a resume ever could. Instead of representing a common commodity (i.e., marketing executive), you've launched yourself beyond the reach of the competition by letting employers and the industry know what specifically it is you do that makes a difference. You've identified and promoted the "motivating difference" you bring to the table and why you—and only you—are the #1 fit for the job.

Ron Wolf of J. Philip Associates Inc. specializes in executive recruiting and organization strategy to the AEC industries. He can be reached at 310-453-7700, ron@jpa-consulting.com.





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by Steve L. Wintner, AIA

For years architects have been looking for ways to justify their fees and hourly rates to their clients. It may just be that this "justification" posture is the obstacle to achieving their goal of higher fees. Instead, more energy could be expended in improving our communication skills, especially our listening skills. We need to take the time to understand our clients' needs and concerns and then educate them about the value-added aspects of our service. Please note that I said service, not services.

David Maister, a management consultant, has written extensively on the subject of the value-added aspect of service and the distinction between it and the services provide. Understanding this distinction may help us to develop our ability to negotiate for a value-based form of compensation.

The initial step to understanding the difference between service and services is to learn that our clients' satisfaction is based on their perception and expectations in the service they receive from us and not in the services we provide for them. In his article "Quality Work Doesn't Mean Quality Service," Maister offers the following formula:

SATISFACTION = PERCEPTION – EXPECTATION

In other words, **satisfaction** will be experienced by the client when their **perception** of the value of the service we render exceeds their **expectation**.

The distinction between service and services can be described by the following:

SERVICES =	TIME SENSITIVE/ COST-BASED TASKS	=	TIME/\$\$
(Technical Activities & is expected)	(Time-card hours)		(Cost-Based Compensation)

Typically, clients have a low-level of **perception** and appreciation for the complexity and value of the services we provide. Their **expectation** is for their professional consultants to be technically competent.

SERVICE (\$\$)	=	NON-TIME-SENSITIVE ACTIVITIES	=	VALUE
(Non-Technical Based & is not expected) Compensation)		(Listening, Being Responsive, Communicating, Concerned)		(Value-

On the other hand, clients have a high-level of **perception** and **appreciation** for these **non-technical activities** that add value to them and their projects.

Clients do not expect, but perceive great value, and hence satisfaction, from these non-technical activities, when they are provided.

Most of our clients are better able to perceive and appreciate the value of the "soft" items that might be provided in the project delivery process, more than the complexity of the services we include in our proposals and contracts. These "soft" items are called service.

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Understanding this distinction allows us to include the value we bring to a project in the determination and negotiation of the final fee.

Paul Segal, FAIA, says, "appropriate compensation comes from the negotiation of an arrangement, not a fee. This includes educating our clients on the interdependence of time, quality, and cost." Examples of this would be arrangements for additional compensation if: 1) The bid documents are completed in advance of the scheduled deadline. This early delivery contributes to the possibility of the project being available for occupancy sooner than anticipated and an earlier start of cash flow for the client. 2) The building leases-up faster than the scheduled pro-forma. 3) The project is completed for less than the budgeted cost due to your innovative design, time-saving details, and the design team's effectiveness in their interaction with the construction team. 4) A shorter time between design and occupancy could save our clients thousands of dollars in interest on the construction loan. These are just a few of the possibilities of the types of service that can be provided that make a difference with our clients and ways to attain a value-based form of compensation for our future projects.

Again referencing David Maister's article: "Clients don't care how much you know, until they know how much you care." Think about that the next time you're with your clients. Show them that you do care by asking questions about their goals, needs, and concerns relative to their project. Learn to listen more than talk. Do you think it's an indication that we should listen twice as much as we talk because we have two ears and only one mouth? Just a thought to ponder.

Communication involves more than speaking. In fact, Bert Decker, in his book *The Art of Communication* says that studies have shown that the most important forms of communication do not involve speaking. Body language and tone of voice are more important in the process of communicating an idea, or message, than the actual words spoken. Only 7 percent of what is being said is attributed to how the message is received and believed. One of the most powerful forms of communicating involves effective listening.

Effective listening is a way to indicate to the person speaking that we have not only heard their words, but are indeed able to indicate to them that we also are in touch with what they are feeling, needing, and expressing, regardless of whether we agree with them or not. We can learn to be empathic without agreeing. Feed back to them, by paraphrasing, what we heard them say. If we are accurate, they will confirm and they will know that we have cared enough to really "hear" what they were saying. If we are not feeding back accurately, they will let us know. This process is not as easy as it sounds. It will require a true commitment to master this process. Once mastered the results and rewards will certainly be gratifying.

Our clients hire us with the expectation that we, above all of our competitors, have the skills and ability to understand and translate their needs and concerns into appropriate, cost-effective, quality solutions. To be successful in this process, and thereby impact our ability to shift from cost-based compensation to a value based form of compensation, will require focusing on the integration of our ability to serve our clients while delivering our design services. Remember, value-based compensation is a win-win environment for us and our clients.

Steve L. Wintner, AIA, founder and principal of Management Consulting Services, which serves a national clientele, can be reached at 713-784-0290, www.managementconsultingservices.com. He is the co-author, along with Michael Tardif, Assoc. AIA, of Financial Management for Design Professionals, The Path To Profitability.



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Leadership and Management: A Methodology from the Trenches

By John L. Capelli, AIA

Firms today spend a lot of time on accepted core fundamentals of project management. What I find lacking in this discourse, particularly concerning the grooming of future project managers, is how to ensure successful outcomes by paying attention to the relationship of our tools, the brand promise, and the level of client sophistication.

Brand Promise and Methodology

The PM and the firm needs to have a methodology for the management of project scope and delivery. The reason for stating this is that the role of the PM varies by market, and one should tailor their approach to meet the demands of the corresponding market segment. For example, in the healthcare practice the driver in the selection process tends to be healthcare expertise with management and delivery seen as transparent to the client. In the federal government it is not unusual (excluding the Design Excellence Program) for one's ability to manage, schedule, control, and deliver the work to take a greater presence and prominence. The point being, in any scenario good project management is required regardless of how its implementation and prominence are dictated by the market.

Elaborating on this premise, some client's desire detailed written reports on the status and performance of the work whereas others may wish to have a monthly executive lunch discussion on the project. Both are acceptable forms of communication; however most importantly the PM needs to establish a comfort zone that works for him and his client.

Planning

No one would dispute that a successful outcome is linked to the right mix of proper planning and the right talent. Focusing on planning, I have found certain simple tools to develop a plan that becomes a "flexible framework" for delivery. The proposal serves as the work plan, the flexible framework noted above. Here we define the project understanding, scope, deliverables and fee. These documents should be updated and modified on a reasonable basis throughout the life of the project. Small projects may only need to be updated at the end of a phase; whereas, larger projects could be anywhere from weekly to biweekly.

As part of one's planning its important to simply state the purpose of each phase, explaining to your future PMs the purpose of each phase in English, not "AIA Speak":

- Programming and Schematic Design: Define the cost, size, and basic arrangement.
- Design Development: Information Exchange: Foundation of construction documents
- Construction Documents: Finish the job
- Bidding and Negotiation: Getting what's on the drawings
- Construction Administration: Service the job while managing the most risk
- Construction Closeout: Finish the job

Minutes, agendas, action item lists, and drawing lists become part of the work plan and communication system. Minutes should document decisions, and action items should not become a transcription of a conversation. Agenda's issued in advance establish the desired outcomes and expectations.

I have found that sophisticated MS Project or Primavera schedules, though valuable, are not the most appropriate communication vehicle for the client. Instead use a simple milestone schedule inclusive of a delay section integrated within the minutes.

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When developing a Critical Path/Gantt Bar Chart schedule, the focus should be on information exchanges and milestone decisions. After developing this in a program such as MS Project, I have found that exporting it into a milestone list is effective for creating an understanding of what needs to be done next at the team level.

Lastly, it is critical for the PM to review all materials and actions from the perspective of the client. I would like to elaborate on one aspect of this approach: cost management.

In today's tight construction market, controlling costs have become a differentiator. Often the architect sees the cost estimator or construction manager as the owner of the cost. The reality is that this is a PM role with design to cost performance as a management activity. By paying attention to the size of the project, the scope and the makeup of the estimate, the PM becomes the "owner" of the estimate, with the estimators as the producers of the data. Then the PM, in monitoring and directing the team for design to cost performance, is adding value by assisting in achieving the desired outcomes sought by his client.

The reason for keeping this last point here in planning is the pressure for design to cost performance in today's marketplace. The ability to plan and schedule the necessary information exchange and requisite time to conduct the estimate inclusive of quality control reviews is a planning skill set that can be taught yet for some reason is left out of today's PM training programs.

Defining the Project Manager

When one looks up the technical definition of a project manager you may find something to the effect of: "Manages project resources in a manner which provides a high level of client satisfaction and achieve the firm's goals of quality design and service, cost management, and timely delivery."

A more practical definition is project management is a combination of leadership and management on the scale of a small business. I have always liked this better as this definition is a simple yet clear expression of our role and opportunities.

When mentoring a rising architect into the PM position, I try to emphasize the need to become a student of leadership. This enables a young architect to simultaneously begin to understand that there is a distinction between leadership and management activities. People have a tendency to construe being organized and efficient as leadership, yet that is not the case. Leaders, in addition to be visionaries, generate such energy that people are attracted to them. Managers write the road map to execute the vision.

Conclusion

In closing, whether implementing a PM training program or grooming a future PM, you must ensure that there is a clear philosophy with respect to project management at your firm. This philosophy is then placed as the foundation for certain fundamentals. Using these fundamentals will ensure the success of each and every project that you are part of. This approach will work whether you are delivering projects as small as 5,000 gsf or as big as 500,000 gsf... because, a successful project is not an accident, but a flexibly planned activity.

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