

The Client Interview: A Sample Questionnaire

Contributed by Frank Stasiowski, FAIA

Excerpted from *Architect's Essentials to Winning Proposals*

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SUMMARY

Author Frank Stasiowski offers questions to ask a client before writing a proposal. These questions will shed light on the details of project and illuminate the client's intentions.

PREPROPOSAL MEETINGS

Sometimes clients schedule formal meetings for all firms interested in submitting a proposal on a project. During this meeting it is important to gather information and ask questions and, above all, listen. Do not discuss or offer your proposal strategy at this meeting; it's premature.

If the client doesn't schedule a formal meeting, consider offering to arrange an informal one. This is a good opportunity to build a better relationship with the client, learn more details about the project, and perhaps "read between the lines" of the request for proposals (RFP).

Ask open-ended questions. Learn everything you can about the project, the client's experience with previous projects, and the client's expectations for this one.

The following are sample questions, organized into categories. Not all questions, or the form of the questions, will be appropriate in every instance. Use the sample questions to stimulate your thinking and broaden the scope of information you might seek to acquire in a client interview.

Determining Client Need

- What led you to our firm?
- How can we help you?
- How would you define the scope of this project in general terms?
- What is our overriding goal for this project?
- What problems or obstacles to achieving this goal have you already identified?
- Where does this project fit into your organization's long-range planning?

Project History

- How did the project originate?
- Who developed the idea?
- Is the idea similar to someone else's?
- Who in your organization is supportive of the idea?
- Who in your organization questions, or questioned, the need for the project?
- Is there any opposition, either internally or externally?
- Will land acquisition be required?
- Are there utility conflicts or concerns?
- Are there environmental issues or concerns?
- What organizations or groups are involved or have an interest in the project?
- What is the source of funding for the project?
- What is the source of funding for professional fees?
- What is the status of the funding?
- Are there any aesthetic considerations, concerns, or limitations?
- Has anyone been pre-selected to provide any services?
- To whom will the design team be accountable?
- What permits and/or regulatory agency approvals are likely to be required?
- What is the anticipated or desired project schedule?

Role of the Client Representative

- How did you become involved in the project?
- How do you feel about the project?
- Have you played a similar role in past projects?

- What is your current role?
- What will your role be after the design team is selected and the project gets underway?
- Will a rating system be used to evaluate competing firms and proposals?
- Is a copy of the rating system available to us?
- Are there Minority or Disadvantaged Business Enterprises (MBEs or DBEs) with whom you have worked in the past or whom you would recommend?
- Who will decide who gets the contract?

Client Expectations

- Have you worked with other consultants before?
- How do you feel about them?
- Did you experience problems with other consultants, and, if so, what type?
- Do you have a particular type of firm in mind?
- How will the proposals be evaluated?
- Do you consider this a bid process?
- What kind of fee structure do you prefer?
- What are your preferences in terms of invoicing?
- What is the time frame for awarding the contract?
- What is the estimated dollar amount involved?
- How did you determine this value?

Your Response to the Client

- To whom should the proposal be addressed?
- How many copies would you like to receive?
- To whom should the proposal be delivered?
- By what date do you wish to receive the proposal?

RESOURCES

More Best Practices

The following AIA Best Practices provide additional information related to this topic

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| 05.04.02 | Effective Marketing Presentations from a Client Point of View |
| 06.02.01 | The Go/No-Go Decision from a Risk Management Perspective |

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| 06.02.02 | Ten Things You Should Know About Potential Clients |
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For More Information on This Topic



This article is excerpted and adapted from *Architect's Essentials of Winning Proposals*, by Frank Stasiowski, FAIA. Written by a leading expert in the field, this valuable resource presents a complete, organized approach to writing, designing, and presenting proposals that grab clients' attention, stand out from the crowd, and win contracts.

See also "Seeking the Project" by Howard J. Wolff, *The Architect's Handbook of Professional Practice*, 13th edition, Chapter 7, page 155.

See also the 14th edition of the *Handbook*, which can be ordered from the AIA Bookstore by calling 800-242-3837 (option 4) or by email at bookstore@aia.org.



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