



AIA Best Practices:

Plan for success: Project management techniques

Contributed by the AIA Knowledge Resources Staff

Summary

Comprehensive project management is vital for success, and its key elements include careful planning, clear definition of goals and timetables, and constant communication. That is the view of Christopher Martersteck, AIA, of Cannon Design and PSMJ Resources, who presented his criteria for project management at the AIA Future of Professional Practice conference, held in Washington, D.C., Dec. 2–4 2007.

Set a platform for success

The success of an architecture project relies on sophisticated and comprehensive project management, according to Martersteck. You can improve the management process at the front end by thinking critically and planning the process: “A successful project involves managing the process and the people involved in the process.” To do this, Martersteck suggests a preliminary project management meeting with all parties involved. Use this meeting to gather and set a clear strategy for the project’s direction and implementation.

Project management planning

At the first project management meeting, it is important to create a management plan that fits the project and those involved. The plan should involve the client’s vision and goals for the project. It should also set metrics for success, scheduling guides, and a dialogue for finance decisions.

Vision and Goals. These help to define the scope and try to distill the client’s goal for the project into clarified statements. Try to answer the question: “What are the objectives of this project?” Once the objectives are defined, prioritize them and keep in mind the project’s scope during this process.

Metrics for Success. Setting metrics may sound complex, but it is an easy exercise that can help everyone involved to gauge project performance over time. Try to quantify elements that can be attributed to the project’s success, like program square footage requirements, schedule goals, and budget expectations.

Schedule. It is helpful to create a milestone chart that reflects the project’s scheduling goals. The chart should show the sequence of events and include meeting dates. It also is important to identify permitting and construction duration.

Finances. Martersteck believes open communication during the first meeting about fee establishment and invoice procedures creates a solid foundation for trust between the client and architect from the beginning of the project.

Project management communication

The project management plan can offer a clear direction, but it is only as successful as the communication between each party during the project. Remember that teamwork is extremely important for an integrative process and clients are your friends, so include them whenever necessary.

Team Support. Buy-in from the entire team is important. For each member to follow through with communication plans, they must believe in the purpose of the project and understand the importance of open communication.

Frequent Communication. Communication does not need to be in person all the time; you can use a file transfer protocol (FTP) site, a project directory, or a shared project binder. Include clients on all project emails to create open communication. And remember that picking up the phone and talking to clients is necessary, too. Routine conference calls and on-site meetings are integral to effective communication.

Status Reports. Biweekly or monthly status reports are an easy tool to connect with clients. They create value and competitive advantage. Status reports help the team focus on deliverables. They do not need to be long; a half-page report that lists recent achievements and next steps is sufficient.

Client Care. Meet with clients outside of the office, perhaps for lunch. This can help build and maintain the client–architect relationship.

About the contributor

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