



## **AIA Best Practices: The client whisperer**

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Every client has a story to tell. All you have to do is listen.

Contributed by Cara Bobchek

### **Summary**

Clients of design firms tell us that what they want most from architects is for them to listen. But how often do you listen to your clients outside of a project engagement? How often do you take a step back and think about your client's purpose, vision, and mission, and how yours might align? How do clients perceive your performance? What is your reputation in the marketplace, and what might clients be telling others about you? What business and industry trends are your clients tracking? Client research, in the form of a marketplace survey, is an effective way to find out.

### **Introduction**

Many architects struggle to find time to extend their relationships with clients when they aren't actively engaged in a commission. Perhaps they've lost touch with a past client who didn't select them for the next job; or they've invested in communicating with a prospective client, even making the short list now and then, but never landing the project. They may have a good working relationship with individual clients, without being confident that they have the "whole story."

All clients have a story to tell, and they're eager to tell it. In our management consulting practice, we've talked to hundreds of clients of design firms through marketplace surveys, and as a result of what the sponsoring design firm has learned from each one, they have rectified problem areas, built on strengths, and created future strategies for success.

### **Structuring client research: The marketplace survey**

You can design a research survey that probes client perceptions and priorities:

- your past performance on projects
- your firm's reputation in the marketplace
- other architecture firms that are leaders in your markets—in other words, your competitors
- factors that clients consider important when retaining an architecture firm

- forces affecting the clients' business

When analyzing the collected responses to your survey questions, note patterns in where they tend to converge and where they diverge. Remember to read between the lines. For example, a 150-person architecture firm with offices in three major cities was pleased to earn a fairly solid average rating of 4 (on a scale of 1–6, where 6 is the highest) on the effectiveness of their project managers and project-related communications. Digging more deeply, they found that while some ratings were as high as 5.5 and 6, a number of ratings were much lower, in the 2–3.5 range.

Further investigation revealed that the lowest ratings were clustered among clients of the firm's busiest office. As a result, the firm leaders provided additional project management training to members of that office and also appointed a deputy office manager to support the current local leader.

## It's not about you

As much as you will want a “report card” on your firm's performance—so that you can address shortcomings as well as capitalize on what you're doing well—you should also view the marketplace survey as an opportunity to listen to your clients' own stories. Your clients are as passionate about their work as you are about yours, and they love to talk about it. Be sure to ask about their world:

- the client's purpose, mission, and vision for the future
- challenges and concerns
- trends they're tracking
- ways in which their business—or their industry as a whole—is changing

Through a series of client-centered questions in a recent survey, a midsize architecture firm in the Northwest learned that facility managers, key decision-makers in a targeted niche of the healthcare market, favored one particular publication to keep abreast of happenings in their industry. The architecture firm placed a series of articles regarding new approaches to sustainability—a topic that their research verified was of continued interest to clients—in this publication, raising their visibility as thought leaders within the target market.

## Targeting clients for research

In client research, it's just as important whom you ask as what you ask. Therefore, compile a contact list representative of the spectrum of your firm's practice:

- **current clients**, including those with whom you're performing well as well as any with whom your relationship might be rocky
- **former clients**, so that you can learn why they are not “current” clients

- **prospective clients**, to learn how they perceive your firm—and how to enhance that perception to convert them into “current clients”
- **partner firms**, such as mechanical/electrical engineers, because they often are in a position to influence client decisions

As many firms do, you might learn something unexpected, even from your “best” client. For example, one upper Midwestern architecture firm with a specialty in civic buildings recently completed a project with a growing municipality in a neighboring state, garnering rave reviews from the client and stakeholders. Following on that success, the firm invested considerable resources into preparing proposals for additional projects, to no avail. Through a third-party survey, they learned that although the client considered them “the best,” local politics forbade the municipality from ever again selecting an out-of-state firm. The client hadn’t had the heart to tell the firm directly that it was disqualified from future work.

Based on the survey, the firm chose to keep in touch with the client through its newsletter and occasional personal email, rather than continuing to send project-specific proposals.

## Tips for effective client research

If you’re convinced that your firm would benefit from client research, consider the following:

- **Include the right number of participants.** Depending on the size of your firm, a survey of from 15 to 50 will be sufficient to give you the big picture.
- **Promise (and deliver) anonymity.** Although some clients surveyed in the past have assured us that they would readily report the same perceptions to the subject architecture firm in person, the incidence of findings that surprise the architecture firms indicate to us that they would not.
- **Employ a third-party researcher.** As strong as your relationships with your clients may be, there are important things that your clients will tell a third party that they simply will not tell you—and oftentimes, these are positive things!
- **Work the phones.** With the survey tools available today, online is tempting. Nevertheless, your researcher and clients will have a more interesting, thorough, and satisfying conversation over the phone. Consider also that a phone call, rather than a video meeting, allows the clients being interviewed the space to collect their thoughts and provide candid feedback. You’ll find that almost every client on your contact list will be eager to participate; we’ve rarely encountered one who won’t.
- **Manage the time.** Design your survey to limit the interview to about 15 minutes. This translates to about 10–12 questions of varying formats. We’ve found that many clients will engage in the conversation for much longer—some for as long as 45 minutes.

## Next steps

Finally, be sure to thank your clients for participating in your survey. Share with them the highlights of what you learned from the research—and, more importantly, what you intend to do about it. Your next steps may be small ones or giant leaps, but as long as you base them on your clients’ story, you can be confident that they are strategically aligned with what the marketplace needs from your firm.

## About the contributor

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