



## **AIA Best Practices: Residential walk-through consultation services**

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Contributed by Laura Montllor, AIA

### **Summary**

Architects can expand their range of services by offering residential walk-through consultation. Laura Montllor explains how this new revenue stream boosted her firm's marketing efforts, provided a community service opportunity, and met clients' needs.

### Capitalizing on an opportunity

A friend—a real estate agent—first suggested the idea of providing walk-through architectural advice to his customers. In our area, which has an older housing stock, many prospective homebuyers are specifically looking for homes that can be renovated or enlarged. Many hesitate to submit firm offers, however, without knowing whether a proposed renovation or addition is feasible, affordable, and permitted by zoning regulations. With our extensive knowledge of local zoning ordinances and experience in residential renovation projects, we began offering specialized walk-through consultation services with minimal preparation.

### Scope of services: clear and simple

As we walk through a house with a client who is considering buying it, we provide brief oral assessments of many elements. We evaluate the basic soundness of the structure and any potential defects. If it is a simple lot with clearly marked boundaries, we are comfortable making a preliminary assessment of the zoning limitations (principally setback requirements) for proposed additions. We suggest suitable locations for possible additions and provide rough “order of magnitude” estimates of construction costs. We point out repair and maintenance items that can be assessed by visual inspection but that might not be apparent to a layperson. We suggest dependable local contractors and provide a list of contractors with whom we have worked. We explain the relationship between an architect and a client, review the building process and explain the architect's role in it, and review building permit requirements.

Unlike a conventional home inspection, which documents only the existing physical condition and tends to focus on defects, a walk-through design consultation helps homebuyers assess the potential value of a property.

## Services as a marketing tool

A typical walk-through analysis, which we provide for a fixed fee, takes less than two hours. We make the preliminary nature of the consultation clear and let the clients know that we are available to provide a comprehensive zoning analysis, detailed feasibility studies and schematic designs, and complete architectural design services. We often have an opportunity to show clients our design portfolio and direct them to our website. From time to time, the consultation will lead to a full-scale architectural project. We provide no written reports, sketches, or architectural drawings. All communication is oral, and the preliminary nature of our professional opinion is well understood, which helps keep the risk of liability to a minimum.

For small architecture firms, maintaining a profitable ratio of billable to nonbillable time is always a challenge.

Because walk-through consultations are of such short duration, they are easy to fit into our schedule and have vastly improved our profitability. The service allows us to meet and screen potential clients and has built-in marketing value. In addition to occasionally leading to projects with the people for whom we provide the service, we meet far more people than we might otherwise—people who spread the word about our firm.

As a community service and an additional marketing opportunity, we “donate” walk-through consultation services to local charity auctions. It gives us high visibility in the community, generates goodwill, and helps market the firm with minimal effort. At silent auctions and charity fundraisers, we donate these walk-through meetings as a two-hour package.

## Building on success

We have had so much success with this new service that we began marketing it directly to real estate brokers. We show brokers and agents that an unbiased professional assessment of the feasibility of renovations is valuable information that can help them and their clients determine an appropriate offering price. We developed an inexpensive brochure that real estate agents may pass to their clients containing a few photos of our work, information about our firm, and client testimonials. Here is an excerpt:

As a new homeowner, how can you get the quality, design, and function you want and stay within your budget? In other words, is the project feasible?

Find the answers during your very first appointment. Get unbiased advice from a highly qualified professional architect.

We can help you answer questions like these:

- What floor plan would allow us the maximum use of available space?
- Do I need a building permit or can I get by without one? Will my taxes go up?
- Which local general contractors should I consider? What will it cost?
- How long will construction take?

- What about zoning requirements and limitations?

## About the contributor

Laura Montllor, AIA, from Port Washington, N.Y., is a member of the AIA Small Project Forum.

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