
October 1.1978
lemermeyer architect inc


nothing will stop me now

REALIZATION

LACK OF BUSINESS SKILLS

- LONG HOURS
- MARGINAL INCOME
- STRUGGLES WITH CLIENTS
- DIFFICULTIES WITH TEAM
- GENERAL FRUSTRATIONS
- REPEATING MISTAKES

TO PROUD TO ADMIT THE MISTAKE

OF GOING INTO BUSINESS WITHOUT THE NECESSARY SKILLS

&

DIDN'T KNOW

HOW TO FIX THE PROBLEM?

QUIT
WHAT YOU'RE
DOING
OR
GET HELP

ON-LINE PROGRAM

LEARNED BUSINESS SKILLS APPLIED DIRECT TO THE BUSINESS

BUSINESS DOWN INTO UNDERSTANDABLE – CENTERS OF ATTENTION

- LEADERSHIP
- MANAGEMENT
- FINANCIAL
- MARKETING
- BUSINESS DEVELOMENT
- CLIENT FULFILLMENT

&

ALL ASPECTS OF THE OFFICE WERE SYSTEMATIZED

WHAT IS A SYSTEM?

A WRITTEN ACCOUNT OF INDIVIDUAL TASKS IS TO BE COMPLETED IN ACCORDANCE WITH ACHIEVING THE COMPANIES VISION.

THESE TASKS ARE REPEATABLE TASKS TO BE DONE EXACTLY THE SAME IN AN EFFECTIVE AND EFFICIENT MANNER.

5 TO 10 SYSTEMS IN EACH CENTER OF ATTENTION

60 – 70 SYSTEMS IN A TYPICAL SMALL OFFICE

BENEFITS OF SYSTEMS

- ALL TEAM MEMBER DO THINGS IN THE SAME MANNER
- USING SYSTEMS SAVES TIME
- USING SYSTEMS AVOIDS MISTAKES
- SYSTEM ARE A GREAT TEACHING TOOLS
- SYSTEM ARE A MANAGEMENT TOOL
- SYSTEMS CAN MEASURE PROGRESS
- SYSTEMS ELIMINATE FRUSTRATIONS

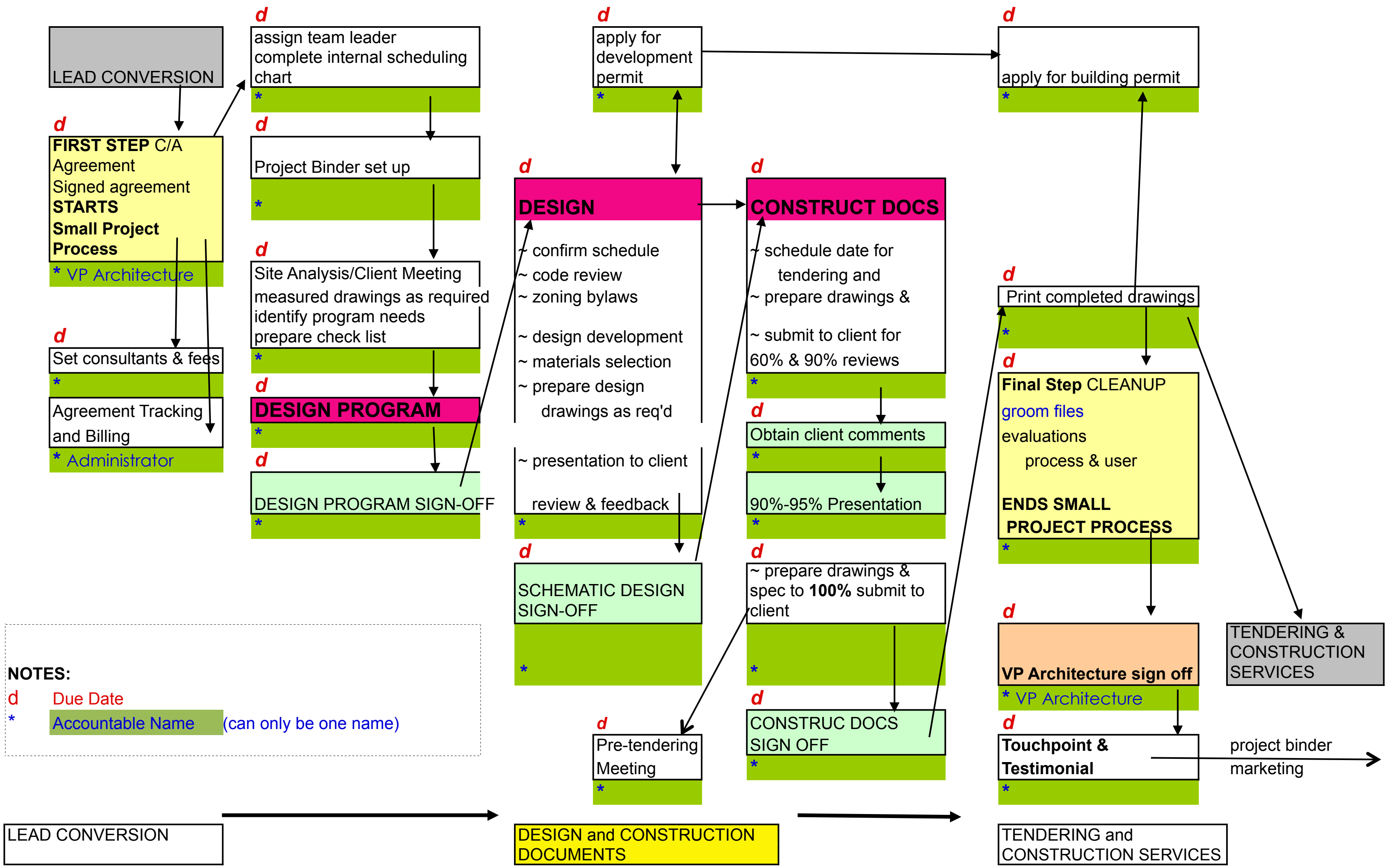
EXAMPLES OF SYSTEMS

- SMALL PROJECTS PROCESS
- TOUCH POINT SYSTEM

ENTRE ARCHITECT TO FORWARD TO ANY ONE INTERESTED LIVE TEMPLATES OF THESE TWO SYSTEMS FOR YOU TO MODIFY TO SUIT YOUR PRACTICE

SMALL PROJECT PROCESS

Project Name & number
(Date Chart Created)
(Date chart updated)



SMALL PROJECTS PROCESS

***to create a clear guideline of steps to follow during the Design & Construction Documents Process for a smooth, efficient process and satisfied client result**
***to avoid frustration by those involved in the process**
***to improve quality of the work**
***to improve efficiency > & profit for 007 Architecture**

The following steps to be reviewed at the outset of the **SMALL PROJECTS PROCESS**. Each step is assigned to the person responsible c/w a time line. Small projects defined as projects with fee less than $50,000
Each step in the process **must be reported to the VP ARCHITECTURE, weekly**, for comment and input.
Prior to all presentations to Client the work must be reviewed & approved by VP ARCHITECTURE.
Use Schematic Design Process – Design Development Process – Construction Documents Process as a back up reference.

CLIENT/ARCHITECT (C/A) AGREEMENT
C/A agreement is prepared and executed by **VP ARCHITECTURE** or other as specified.
- prepare C/A agreement for review with the client – face to face
- review Scope-of-the-work Changes Process with client
- review every article in detail & explain the intent – inclusions & exclusions
- permit time for questions or for client to consider details of agreement
- retain copy for discussions
- once all client queries have be answered, sign & date the contract
- the executed 'original' copy of the agreement goes to the AGREEMENT TRACKING in office administration
- depending upon the scale of the project prepare one of the following agreements for Client review
  RAIC document #7 large projects $50,000 to $300,000 in fees
  In house letter agreement document small projects $50,000 & less in fees

SET CONSULTANTS & FEES
Consultant Agreements to be in place before any work has begun.
VP Architecture to provide Consultant Agreements to team leader for information.
Make adjustments if required for any reason arising out of work completed or scope change.
- structural, mechanical, electrical, etc.
- special consultants as project requires.

AGREEMENT TRACKING & BILLING
OFFICE ADMIMISTRATOR is responsible for tracking Consultant and Client/Architect Agreements. Completion of the steps in the process are communicated to the Office Administrator, throughout the process, so a bills can be sent expeditiously according to client/architect agreement (See MONEY SYSTEM FOR BILLING PROCESS).

ASSIGN TEAM LEADER
Team Leader and required assistants are appointed by VP ARCHITECTURE at an in house meeting. assistants to be assigned by VP Architecture & team leader as required when team leader & assistants are assigned. Chart completed and approved by the VP Architecture before any work starts on the project. Team leader gives an approved copy of the chart to every accountable name on the chart, a copy to the client and the original to Office Administrator.

PROJECT BINDER

To be set up with correct name & project number at desk of Team Leader – including:

- contacts names & numbers (calling cards on front cover of file)
- client information
- meeting notes
- bylaws and building code analysis
- site information
- design development drawings & “sign off” (include any subject to conditions)

* keep file current through-out the project – groom file weekly

SITE ANALYSIS / CLIENT MEETING

- prepare Check List of questions and info required in initial client meeting
- bring all necessary tools for site measurements, photography, etc
- meet with client to confirm program needs – record information gathered
  ask question > drill deeper
- discuss construction budget and schedule
- confirm all client information - soils reports, topography plans etc
- record client responses, observations, statements, needs, etc
- prepare meeting notes along with date, attendance, questions asked - within 48 hours of meeting
- send one copy to client and one copy to design file
- complete all interior & exterior site measurements required to confirm “as-built” conditions

ON AN EXISTING BUILDING:

- site analysis includes finding any existing drawings & creating MEASURED DRAWINGS as required to complete the design work. These MEASURED DRAWINGS should be the basis of the design & construction documents. Project leader to assess what is required to suit the project.

- analyze & diagram all factors having impact on site & project
  - eg. weather – wind, sun, temperature / traffic patterns – pedestrian, vehicular, sight lines, relationship with adjacent buildings, etc
- review applicable by laws & building codes

DESIGN PROGRAM

- detail description of all elements to be included in the design c/w diagrams
- based on questions & answers of client and site observations
- description to include
  sizes, relationships, detail requirements, intended purpose, special needs
- outline project budget into major elements – construction, furnishings, fees, etc.
- outline design development and construction documents schedule
- present Design Program to client for review, comment and input
- revise as required and have client 'sign off' Design Program in a letter

CLIENT SIGN OFF

DESIGN PROGRAM is to be 'signed off' by the client or client's rep with approval in writing. This is done by way of a letter or client initials on drawings. The design file is updated in the binder.

sample wording for sign-off of DESIGN PROGRAM

'this DESIGN PROGRAM is the basis of our design. It is an accurate verbal description of the project pre-design. We will proceed with SCHEMATIC DESIGN upon your concurrence in writing'

DESIGN & CONSTRUCTION DOCUMENTS

DESIGN

- once the Design Program and Site Analysis are completed, the Team Leader can proceed with this aspect of the work
- Team Leader to ask for input from VP Arch on agreed schedule throughout the process
- provide drawings, models, graphics as required
- complete code analysis, building classification, fire separations etc
- provide project cost estimate and project schedule
- meet with consultants to review requirements and scheduling
- select systems to be used – structural, mechanical and electrical
- select all materials to be used on the project inside & out (along with samples)
- apply for Development Permit
- update and maintain Project File at all time

sample wording for sign-off of DESIGN DOCUMENTS

We require your acknowledgement that the DESIGN DEVELOPMENT has met the objectives outline in the Design Program. After 'sign off' we will proceed with CONSTRUCTION DOCUMENTS. Any fundamental changes to the design due to the Client shall be deemed an extra to the work and charged at per diem rates.

APPLY FOR DEVELOPMENT PERMIT

CONSTRUCTION DOCUMENTS

- meet with the consultants to present approved Design drawings
  - prepare for meeting with planned Agenda and list of questions - record minutes and file
  - confirm building systems, schedule and 60%, 90% & 100% submission date or other dates as agreed to at the start of the project.
  - confirm drawing standards – titles, sheet size, specs and spec format
  - confirm that each Consultant's Agreement is in place
- all drawings are to be set up as per Drawing System Manual
- at all times during Construction Documents maintain **Check Set**
- complete all drawings and specifications
- coordinate with consultants through-out the process
- select and confirm all materials
- prepare color board for client approval
- one week prior to completion date – call for pre-tender meeting

NOTE: confirm client sign off process & % completions at initial meeting with client and enter it into the details of the Project Chart.

OBTAIN CLIENT COMMENTS AND ACKNOWLEDGEMENT OF 60% COMPLETE & 90% COMPLETE

CONSTRUCTION DOCUMENTS are reviewed by the client at this point and input noted.
Or CONSTRUCTION DOCUMENTS reviews, other than 60% and 90%, are scheduled at project start up.

90%-95% CLIENT PRESENTATION MEETING

all disciplines to present their design to the client at this presentation meeting

PREPARE DRAWINGS & SPEC TO 100% COMPLETE & SUBMIT FOR CLIENT SIGN-OFF

CONSTRUCTION DOCUMENTS are to be 'signed off' by the client or client's rep with approval in writing. This is done by way of a letter or client initials on drawings.

We require your acknowledgement that the CONSTRUCTION DOCUMENTS have met the objectives outline in the Design Program. After 'sign off' we will proceed with TENDERING & PRICING. Any fundamental changes to the design due to the Client shall be deemed an extra to the work and charged according to an Impact Assessment.

PRE-TENDER MEETING (refer to attached PRE-TENDER MEETING AGENDA FORM in TENDERING SYSTEM.
One week prior to the date for completion of the construction documents phase, the Production Manager (PM) meets with the Construction Services Manager (CSM) to coordinate the sign-off of the Construction Documentation phase and transition to the Tendering phase.

APPLY FOR BUILDING PERMIT

- Upon completion and printing of the CONSTRUCTION DOCUMENTS including consultants drawings make APPLICATION FOR BUILDING PERMIT to the authorities having jurisdiction.
- Normally the Contractor will pay for the Building Permit when the Documents have been checked and are ready for issuance.
- Request, at the time of Building Permit application, an approximate time line required for drawings checking.
- Make certain the authorities having jurisdiction have all your contact information and indicate if there are any questions to call you for clarification.
- All drawings to be stamped with Architect's Seal.

PRINT COMPLETED DRAWINGS & SPECS (See Out Printing Process)

- set date of printing and clearly communicate to consultants.
- decide on printing method, by who and communicate to consultants.
- before printing drawings get the clients approval and set a TENDER DATE.
- The Production Manager will provide the Construction Services Manager with one complete "print ready" set of final drawings and specifications, including architectural, structural, mechanical and electrical.

CLEANUP, GROOM FILES EVALUATIONS, PROCESS & USER (FINAL STEP)
The system and the users will be evaluated upon completion of the process. See the VP Architecture for user evaluation. See the system manager for system evaluation. This step must be complete before VP Architecture will sign off the project.
Upon completion of the small project process, when the final drawings are done, it is necessary to perform a clean up of the various files and drawings on the system. This is to ensure, all files are efficiently stored, and easily retrieved for future use. The following list notes all the items included for completing the Small Project Process and bringing it to a tidy conclusion.

1. **Groom Construction Document on Digital File System.**
   Restore Digital File order, and purge unneeded data. Review with 007 company policy
   on proper file order.
   By TEAM LEADER.

2. **Groom Construction Files** (Binder), as above.
   By, TEAM LEADER.

3. **Groom Flat Files**
   Update drawings & remove outdated drawings.
   By, TEAM LEADER TO ASSIGN

4. Ti**dy & Organize Personal Space**.

5. **Update Drawing System Manual.**
Take newly created drawings, details & symbols and install in Detail Library as required.
By, TEAM LEADER

6. **Tidy Model Space**
Restore order to model building shelf, & list remaining supplies.
By, TEAM LEADER TO ASSIGN

7. Copy & Paste Final Design Drawings to **Graphic Archive**.
By, JUNIOR DESIGN ASSOCIATE

8. **Construction Document System Evaluation Meeting**.
To discuss Construction Documents Process with all participants.
Headed by, SYSTEMS MANAGER, and attended by ALL

9. **Update Construction Documents Process**.
Update items, as per meeting discussion (above). Produce schedule to complete items.
By, TEAM LEADER TO ASSIGN TASKS

10. **Review Completed Construction Drawings** as a teaching opportunity
By VP OF ARCHITECTURE w/ TEAM LEADER & MEMBERS

VP ARCHITECTURE SIGN OFF
This benchmark must be authorized & approved by VP ARCHITECTURE before the TENDERING PROCESS can begin. At completion of CONSTRUCTION DOCUMENT PROCESS and sign off, there should be only minor known issues that may be addressed by way of an addendum.

TOUCHPOINT & TESTIMONIALS
Upon completion of this Phase of the work a questionnaire is given to the client with a copy to Marketing Department & a copy to Project Binder.
TOUCHPOINT & TESTIMONIAL QUESTIONNAIRE & SYSTEM are found under MARKETING

TENDERING & CONSTRUCTION SERVICES – see Tendering and Construction Services Processes

End of process

SMALL PROJECT PROCESS USER EVALUATION	
PROJECT:	DATE OF EVALUATION:
NAME OF THE EVALUATED:	

PROJECT CONSTRUCTION VALUE

ON TIME YES or NO if not WHY

STANDARDS

- **Team leader will report to VP ARCHITECTURE at each step in the process**
- Must reflect requirements of the design program = users needs
- Must demonstrate how the design budget will be met
- Must reflect the design philosophy of the Firm.
- Must maintain schedule
- Must follow the DRAWING SYSTEMS MANUAL
- Each team member is responsible for their own error free work throughout the process

EVALUATION OF THE SYSTEM USERS at completion of each project – by VP Architecture
The completed Evaluation to be passed onto the SYSTEMS MANAGER c/w CHART (original)

Evaluation Criteria

+10 excellent
all steps in the process have been assigned & time line set
deadline has been met **ahead** of schedule
client has indicated satisfaction with process & timing
team leader & participants throughout are clear on the process

+5 good
all steps in the process have been assigned & time lines set
deadline has been met **as per** schedule
client has indicated satisfaction with process & timing
team leader & participants throughout are clear on the process

0 fair
some of the steps in the process have been assigned & time lines set
deadline met but loose ends not tied up
client has commented on some lack of timing on the process
team leader & participants indicate some lack of clarity with the process

-5 improvement required
assignment of the steps & timelines is adhoc
deadline has not been met - original deadline missed by less than 10 days
client has complained about some of the timing in the process
team leader & participants require additional clarification with the process

-10 unacceptable
few of the process steps have been assigned along with timelines
deadline has not been met - original deadline missed by more than 10 days
client has indicated general dissatisfaction with the timing of the process
team leader & participants are confused about the process

SYSTEM EFFECTIVENESS EVAUATION by Systems Manager & users

1. Is system effective? Is it a clear guideline?
2. does it help maintain schedule?
3. does it help with client satisfaction – how?
4. list problems encountered with system
5. suggestions for improving system

RECORD OF USER EVALUATIONS

SYSTEM

USER	PROJECT NAME	ROLE	START	COMPLETE	% of project VALUE	SCORE	NOTES

TOUCH POINT & TESTIMONIAL SYSTEM WHAT A CLIENT WANTS

To record and tabulate all comments by clients about anything relevant to our work, our actions & anything we do to help our clients.

The **negative** feedback will help us to 'shape-up'.
The **positive** comments will reinforce what we do & encourage us to serve the client better.
While completing our service, we make clients time with us a **memorable & pleasant** experience.

We use the feedback at **TOUCH-POINT & TESTIMONIALS** to reinforce our 'selling proposition' to the next client and/or for the next project.

TOUCH-POINT – each time you meet – opportunity for feedback
TESTIMONIAL – a statement that your client makes about our service

WHAT DO CLIENTS REALLY WANT

- Clients needs fulfilled
- Value for money spent
- Price & Cost are not as important (higher profit potential)
- Service (unmet need)
  - Example Starbucks
  - Packaged salads X 7 of unpackaged
- Ambiance make the time together pleasant
- What service can we provide that they will buy
- Added value

How do you **really know** what a client wants? By asking!

Generally, what services do we provide?

- programming
- schematic design
- design development
- construction documents
- construction services
- evaluations of existing situation

If we do a good job on the above, have we served our client? Maybe?

How can we serve the client if we don't know them. How do we know them?

- Sometimes, clients don't know exactly how to describe their needs.
- To extract their needs is a skill developed over the years with practice.

Even though we give similar service to clients, each client has different needs and expectation. A big mistake is to assume the each client has the same needs. The difference may be subtle but important to the client being served. Being able to distinguish the differences will determine the client's satisfaction with their Architects – service providers

By asking:

Asking the right questions.
Designing questions to ask.
Listening & recording the answers
Re-asking the questions.
Confirming the recorded answers – ask "Is this what you meant"

Three types of client you interface with:

1. The decision maker
2. Person reporting to the decision maker
3. Many headed client

statement(We are always trying to improve our services) **questions V**

What did you expect of our service?
How would you rate our service to date?
What can we do to improve our service?
What questions do you have about our service?

Will you give us a testimonial on our services?

These questions may spawn additional questions – Pay attention.
Record the answers

Questions may be asked at each and every touch point:

Appropriateness of the timing of the questions.
Post meeting, coffee, lunch, etc
Face to face is best – answers + body language.

We may discover a number of things:

- we may be doing something wrong & easily corrected.
- we may be able to discover an added service that we can charge for
- we may be able to identify a value-added service for little cost to us.
- We show our interest in their work, organization, their challenges and thereby strengthen the relationship.

Practice (role play) asking the client questions

Describe a situation when meeting with a client.
And ask the appropriate questions.

End of system

TOUCH POINT/TESTIMONIAL QUESTIONNAIRE DATE

PROJECT

PHASE________________________

describe project/work

RESPONDENT'S NAME TITLE

QUESTIONS posed & recorded by____________________________

Rate our service compared to your expectations?

unacceptable | below expectation | ordinary | above ordinary | extraordinary

Overall, all aspects of service to date?

unacceptable | below expectation | ordinary | above ordinary | extraordinary

What can we do to improve our service?

SCHEDULE • INFORMATION • COSTS • MEETINGS • SKILLS • FRIENDLINESS • HELPFULNESS • ATTENTION TO DETAIL

What questions do you have about our service?

SCHEDULE • INFORMATION • COSTS • MEETINGS • SKILLS • FRIENDLINESS • HELPFULNESS • ATTENTION TO DETAIL

What quotable comment can you give us about our services?

SCHEDULE • INFORMATION • COSTS • MEETINGS • SKILLS • FRIENDLINESS • HELPFULNESS • ATTENTION TO DETAIL

What comments will you give others about us? TESTIMONIAL

These questions may spawn additional questions – pay attention to answers and record the answers and add useful to NOTES. THANK YOU attach notes and observations as required

Would you recommend us? to whom?

responses one copy to MARKETING mailbox one copy to PROJECT BINDER

Do you:

Struggle to deliver your services that positions you a market leader?

Struggle to make your team and company achieve the success you'd like?

Struggle to fit the pieces of your business together that works?

MENTORING PROGRAM MAY BE FOR YOU

Motivate your clients and your team

Learn to write and use systems

Acquire skills in budgeting & essential financial reporting

Become the go to architect in your Market

Learn client getting strategy

Complete work in shorter time
with fewer errors
and happier clients

ON-LINE PROGRAM

• WITH A COACH • OVER ONE YEAR

QUESTIONS

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