



Guidelines for a Successful Relationship with Your Client

I. Listen to Your Client

Time spent with your clients in the early stages of a project is well spent. Attentiveness and careful listening will enable you to assess a number of critical elements for the success of small projects, such as potential personality driven problems or those arising from a breakdown in the decision making process.

Identify the decision makers in a family or partnership. This is essential for avoiding wasted efforts or conflict, as is clearly defining the decision making process for the client.

Take copious notes at every meeting to aid in the clarification of what the client is really saying: summarize your client's comments, requests and directives in writing and review them with the client at the end of the meeting.

II. Identify Client Priorities

The client should be the person to prioritize program elements, not the architect.

Early on, start a discussion of the importance of client priorities, particularly around schedule, scope of the project, and hoped for quality so that if budget constraints appear later, the client will have a good idea of the relationship between these issues and will be willing to make the necessary tradeoffs.

III. Cost and Buildability Issues

Inattention to budget and unbuildable designs are the chief complaints clients have about architects. Discuss potential project costs with your clients early on in the process. It is helpful to provide to them a range of costs for a project and/or a preliminary budget. Bear in mind that clients will not have any idea of cost and that it is your responsibility to guide them as well as to provide a rough idea of construction costs. Remember that architects should *always* design for the client, first and foremost and that clients have a right to know both some idea of construction cost and your fee.

The project budget is a potential area for difficulty. The architect needs to know what the budget figure given by the client really is and if there will be potential budget deficiencies or if stated budget limitations have been overstated. Is the budget firm? Is there leeway? If so, how much?

If you are unsure that the figure given for the project budget by the client is the true figure, you may want to ask, "How are you paying for this? Do you have the financing in hand?" The answers to questions of this nature may prevent future problems.

Cost estimates: sometimes it is desirable for the architect to provide cost estimates to clients. If the client is willing to bear the expense of a cost estimate, the architect may ask a contractor or estimator to provide potential figures at particular stages of the project. This may be a way to keep within a budget.

Keep yourself up to date on new and alternate construction, and know the codes to avoid submitting unbuildable plans. Consider periodically paying a contractor to review samples of your designs to improve buildability.

IV. Scope of Services

At the beginning of the relationship, clients should be educated as to the components of the design process. Then, make sure that the scope of services is clearly defined.

Discuss project timing with a client prior to starting a project: include zoning, surveying, etc. as a way to indicate scope.

You may want to present some kind of document that outlines various design services (AIA B163 can help you with its list of services). Clients need to know that if the architect doesn't provide a particular agreed upon service, someone else will have to. Develop a matrix of services required (for help with this, consult the AIA Handbook of Professional Practice) and identify who is going to deliver those services.

Be sure to indicate in your scope of services when and how you expect payment.

Spell out that after schematic, the clients will pay for new design or multiple design concepts. You might say, "Until we have reached a successful conclusion for schematic design, I will charge you \$XX an hour".

Sketching with the clients is also useful: it helps for the client to have an understanding of the design process so that he or she can buy into the process. It is also a way to indicate that there is a cost to anything beyond that activity.

V. Educate your Client

Bear in mind that it is widely perceived that architects are a luxury. Even if your client has called you, an architect, for your services, there may still be some residual misperception that manifests itself in a view that some services should be free.

Educate your client that the architect saves money; to be persuasive be specific and give examples of cost savings.

Educate your client about the realities of design—that many design decisions are code or regulation driven and may therefore present additional cost to the project but are required by law.

VI. Qualify your Clients

Be aware that there are some clients that you do not want to have under any circumstance. If you spend sufficient time with your client in the beginning of the project, red flags may come up.

A lack of a clear path in decision making, discord between couples, unreasonable expectations, a pre-selected contractor all are warning signals.

What is desirable is a good match between the personalities of owner and designer, but sometimes this can only be approximated. Watch for signs that there is a critical mismatch.

Some architects prepare a set of questions that will help to identify the potentially difficult client.

Do not be afraid to "fire" a client as a last resort.

VII. Manage Client Expectations

Managing client expectations is related to defining priorities: the architect should make every attempt to make the connection for the client between the desired outcome and possibility.

On design matters, help the client to articulate what he or she wants—use photos, clippings, anything to clarify and make concrete the client wishes.

VIII. Contracts

Always have a written contract! This will avoid many a difficult issue.

Require that the contractor have a contract with the client that requires the architect to sign off on payment; this allows for control of cost and a clear line of responsibility.

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