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# Practice Management Digest

## Advancing the Practice of Architecture

*As the Practice Management Knowledge Community our Mission is to Advance the Practice of Architecture through discovering, generating, organizing, and sharing insights, resources, and tools that enable architects to practice more effectively.*

## Features

### Letter from the Editor

*By Donald Simpson, AIA, LEED® AP*

This Edition of the PM Digest focuses on issues related to FIRM PLANNING; the things that we can do to envision a preferred future and purposeful steps to make it happen. In this issue you will find both Best Practices and Case Studies documenting initiatives by firms to plan for their future in a particular area of practice. In an effort to “Practice what we Preach”, your Practice Management Knowledge Community (PMKC) also has included the PMKC Strategic Plan for the year.

Firms are finding that Strategic Alliances are increasing important to secure and execute work. There are articles related to Alliances and Mergers & Acquisitions. This PM Digest also highlights a number of Alliances that the PMKC has been developing. [Continue Reading](#)

### Ownership Transition: When Things Don’t Work Out as Planned

*By Robert P. Smith, AIA*

It seems to me that many, if not most, ownership transition (OT) plans are initiated during “good times”. During periods of economic prosperity, there is a tendency to believe that the operating environment – both internally and externally – will remain constant over time. Regrettably, as we’ve all been reminded during the past few years, “hard times” revisit our profession with uncomfortable regularity.

Since a full-blown ownership transition plan generally requires several years to implement (often 5-10 years when multiple players are involved) the complete transition of ownership from one generation to the next is likely to overlap at least one recession. When this overlap occurs, unpleasant surprises can occur. In severe cases, the OT plan itself can collapse. [Continue Reading](#)

### Why Your Firm Needs a Strategic Plan - And how you can make it successful

## Fall Issue 2011

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*By Raymond Kogan, AIA and Cara Bobchek*

Architecture firms are good at thinking strategically about how to tackle a project; that's how you earn your fees. Think about how you take on a design assignment for a client: you listen to the client's needs, address those needs in a way that meets the schedule and budget for the project, and then design a solution that will help to achieve the client's vision. Strategic planning leverages those same analytical, organizational, and problem-solving skills that you already possess as an architect to envision, promote, and implement an exciting and successful future for your own firm. [Continue Reading](#)

### **Strategic Alliances Best Practices: Lasting, deep relationships enhance and strengthen independent Architectural practices in the globalized economy**

*By Mark Buckshon*

Can strategic alliances allow you to maintain independence and compete in a globalized environment of mega, multi-billion dollar architecture, engineering and construction (AEC) behemoths? Yes, if you look at the process from a deeper, longer-term perspective. However, success is difficult to quantify and is best measured through qualitative observations rather than absolute business development and marketing metrics. [Continue Reading](#)

### **Effective Mergers and Acquisitions**

*By Michael Landry*

Corporate development transactions (mergers, acquisitions, sales and divestitures) should be thought of as tools to accomplish strategic objectives – they aren't a strategy in and of themselves. The basic strategic decisions need to be made prior to a transaction. What is your objective? Where are you going as a company? How will you operate to achieve this objective? What will be the scope of your operations? Why should customers want to work with you? How will you differentiate yourself in the minds of your clients?

Once you've answered these questions and made the decisions that they imply, then, and only then should you ask the next question. Will this transaction help me achieve my strategic objectives? [Continue Reading](#)

### **Planning an International Practice**

*By L. Bradford Perkins*

Many firms – ours included – stumble into their first international project. It is not uncommon to react like a dog that chases a bus and, to its surprise, catches it. Then what? Most experienced firms agree that any international practice should be governed by a plan – even if it is developed after securing the first one or two projects.

The costs and risks of international practice are too great to just play it by ear. There is no standard format for a plan but there are at least six basic issues that should be addressed. These six include the following:

## [Continue Reading](#)

### **Embracing Social Responsibility at Perkins + Will**

*By Andrew Wolfram, AIA, LEED AP BD+C &*

*Mark Jolicoeur, AIA, LEED AP BD+C*

In April 2007, the leadership group of Perkins+Will convened in New Orleans for 4 days. The primary purpose in selecting New Orleans for this biannual event was to witness and understand the devastation that occurred in New Orleans as a result of Hurricane Katrina in 2005 and bring our professional resources to serve in some small yet significant ways toward recovery. As a firm already committed to environmentally sustainable design practices, this retreat confirmed our equal commitment to engage and initiate as socially responsibility professionals across social and economic strata to address critical issues of our own local communities within the broader context of such issues around the world. The experience served as the foundation to formalize a corporate plan for social responsibility within Perkins+Will. [Continue Reading](#)

### **An Evolving BD Culture Sows the Seeds of Success - Winzler & Kelly Case Study**

*By Richard Friedman*

In this case study, we find out how one firm successfully evolved from a Rainmaker to a Seller-Doer culture, and is now establishing a firm-wide business development (BD) culture.

Winzler & Kelly (Santa Rosa, CA) is a 300-person multidisciplinary engineering and environmental consulting firm serving public- and private-sector clients in the western U.S. and the Pacific Rim. During its first 50 years, Winzler & Kelly relied on a few rainmakers to bring in the majority of its new work. About 10 years ago, however, the leadership recognized that this model was impeding the firm's growth. [Continue Reading](#)

### **Positioning for Competitive Advantage**

*By L. Jack Reigle*

It goes without saying that the effects of the Great Recession have had devastating effects on the design industry, and we will likely be dealing with the macro-adjustments it has wrought for the next decade or so. Within that context, what can firms do to increase their competitive advantage and remain true to their highest aspirations to serve society and their chosen markets?

While refreshing the firm's strategy is always a useful approach, there's also the concept of positioning, which is a two-sided concept for building strength and winning work. The challenge of positioning lies within the realm of long-term planning, but requires a more deliberate thought process to implement its greatest benefits. [Continue Reading](#)

## **PMKC Strategic Plan**

*By The PMKC Advisory Group*

**Mission:** The Practice Management Knowledge Community's mission is to discover, generate, organize, and share insights, resources, and tools that enable architects to practice more effectively.

**Vision:** To serve as an essential resource for advancing the practice of architecture. [Continue Reading](#)

## ***Upcoming Events***

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### **AIA Practice Management Knowledge Community Conference at Architecture Exchange East 2011 (ArchEx)**

ArchEx, presented by the Virginia Society AIA, is the mid-Atlantic region's premier conference and expo for architects, engineers, interior designers, landscape architects and planners.

Now in its 24th year, ArchEx will be held November 2–4, 2011, in historic Richmond, Virginia. The AIA PMKC will be providing a Practice Management 'track' of programs. Please plan to join us.

Follow PM Knowledge Scholar Lira Luis on the PM homepage as she [tweets and blogs](#) Practice Management content from ArchEx2011.

## ***Webinars***

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### **November 16th – Best Practices in Competitive Intelligence**

This webinar is a collaborative effort between SMPS and PMKC. The content in this webinar is based on a White Paper funded by the SMPS Foundation. [Register today.](#)

### **December 8th – A/E Industry Consolidation**

This session will review the impact on industry consolidation trends and how design firms can best position themselves to successfully close deals in the new environment, whether they are buyers or sellers. [Register Today.](#)

Visit the PMKC [Webinar Resources](#) page to view the calendar and the list of archived webinars.

Archived PM webinars are also available on the PM [Youtube playlist](#).

## ***Editorial Calendar***

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The next Practice Management Digest Issue, to be published in the fourth quarter of 2011, will have the overall topic of Financial Management and Contracts. This include topics such as:

- Financial best practices

- Metrics and benchmarks
- Contracts and agreements
- Negotiations

If you wish to provide an article for consideration in the next *PM Digest* on one of the above topics, please contact the editor at [dsimpson@kpsgroup.com](mailto:dsimpson@kpsgroup.com) for further information.

### ***Best Practices***

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Design is serious business and you need serious advice. The AIA's Practice Management Knowledge Community has reorganized, culled, and expanded the online compendium of nearly 400 Best Practices, which now align with the Architect's Handbook of Professional Practice.

Best Practices continue to evolve, and you can contribute your own firm's best practices by e-mailing [bestpractices@aia.org](mailto:bestpractices@aia.org). To learn more, visit [www.aia.org/practicing/bestpractices](http://www.aia.org/practicing/bestpractices).

### ***Resources***

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[AIA Practice Management Knowledge Community on KnowledgeNet](#)

[AIA Practice Management Knowledge Community Best Practices](#)

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