



Practice Management Digest

News & Best Practices from the PM Knowledge Community

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Features

Investing Nonbillable Time

By Mel Lester

Our industry views billable time as revenue and nonbillable time as cost. Although you need to increase your utilization, most managers do not maximize the value of nonbillable time. More than a simple cost; rather, these hours are a valuable investment opportunity.

Avoiding the Nightmare Interview

By Joanne G. Linowes

You know the story. You come in second (or third) for a great job for which you put together the precise presentation team to win the interview. It is your worst nightmare. Winning now requires a complex blend of political savvy coupled with bulls-eye content, psychology of audience appeal, people skills, and influential strategies. Find out how to improve on what works.

Being Different—and Profiting From It!

By Scott Braley, FAIA, FRSA

Our industry may quickly become a buyer's market. Differentiating your firm from the competition—ethically and effectively—can mean all the difference when it comes to getting more and better work, fostering mutual respect, and securing fees that reflect your real value.

Fast-Track to Must-Have Status

By Charles Nelson, AIA, FRAIA

This workshop at the AIA Knowledge Community Fall Conference & New York Chapter Conference held October 27–29, 2005, focused on how talented younger professionals can leap frog ahead in a practice. Such talents bring with them special management issues—such as how practice leaders can keep their young talent, instead of watching them rocket off to better futures elsewhere.

Small Design-Oriented Firms: The Real Innovators (and Winners)

By Phyllis Dubinsky

In the world of architectural design, small design-oriented firms can lead the market in a variety of areas without having to compromise and succumb to the larger firms. Although going it on your own is sometimes daunting when you consider the resources available at the larger firms, there are alternatives.

Using RFIs to Calculate External Failure Costs

By Cliff Moser, AIA, MSQA

To establish a successful cost of quality (COQ) program, a firm needs to develop program that is measurable, comprehensive, and designed to operate within its existing cost accounting system. This article explores how to use requests for information (RFIs) as a collection and measurement tool for assessing a project external failure costs and how to use that information to develop a COQ program.

Managing is Designing? Exploring the Reinvention of Management

This conversation among GK VanPatter, Fred Collopy, and Richard J. Boland Jr. on the importance of design in management appeared in the 2005 *NextD Journal*, Issue 8.

Reclaiming the Day: Timesaver Tactics for Architects

By Charles Nelson, AIA, FRAIA

A summary of a workshop Reclaiming the Day: Timesaver Tactics for Architects at the AIA Knowledge Community Fall Conference & New York Chapter Conference, October 27–29, 2005, at the Center for Architecture in New York.

Leadership Skills for Today

By Tom Larsen, AIA

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Architects have traditionally defined leadership as to whether the architect a great designer. However, to lead in today's environment, architects need to develop external leadership skills—leading from the client's perspective. To engage in this client-oriented approach, architects need to develop and practice seven behaviors and skills to effectively lead their organizations.

Image Advantage: Creating a Powerful Firm Identity

By Nancy Egan and Cathy Edgerly

Addressing the issue of firm identity begins with the most basic question, "Who are you?" An honest, thoughtful response requires a focused, sometimes uncomfortable examination of the true purpose and values of the firm.

Why the Future Won't Need Today's Design Firms

What's next for successful architecture, and design practices? We will explore this question more deeply in the upcoming months in *DesignIntelligence*. This much is known: the best firms always move forward.

News

Letter From the Editor

By Amy Yurko, AIA

The PMKC annual fall conference, Getting to Great, was presented jointly by the AIA PMKC and the AIA New York chapter. It was a breakthrough event, presenting powerful lessons in leadership development, marketing, and management skills

Call for Volunteers

Add your expertise to the Practice Management Knowledge Community by volunteering for its Best Practices Subcommittee.

News, Links, and Resources

Resources

Handbook on Project Delivery and Update Now Available

In response to the overwhelming need for information about today's complex and innovative project delivery methods, the American Institute of Architects, California Council (AIACC) has developed a comprehensive guide for architects, their clients, and contractors, to assist in important building-related decision making.



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Investing Nonbillable Time

By Mel Lester

Our industry views billable time as revenue and nonbillable time as cost. So naturally we aim to maximize billable time, or utilization, while minimizing nonbillable time. In fact, in architecture, perhaps no performance metric demands more management attention than utilization. But is this sometimes maniacal focus warranted?

Of course, you need to increase your utilization—that is straightforward economics—but I think most managers miss the boat concerning nonbillable time. These hours are not simply a cost; rather, they are a valuable investment opportunity.

Consider the facts: Average utilization among technical consulting and design firms is about 60 percent. That means about 40 percent of the average firm's time is nonbillable. So of 260 workdays for the average employee, about 104 days are nonbillable (surprising to think of it that way, isn't it?). Of those 104 days, the typical employee in our business has about 35 days for vacation, holiday, and sick leave. Probably no more than 70 percent of those days are actually taken, so let's assume only 25 days away from work.

Now imagine a firm of 100 employees. That translates to about 7,900 days of nonbillable work! (You can do the math for your own firm: No. of employees x 79 = No. of nonbillable days per year.) That begs the question: What are you doing with all that time?

Although most firms closely manage and monitor billable time, they apply little discipline to deriving optimal benefit from nonbillable time. That's an unfortunate misuse of your most valuable resource! Keep in mind the spectrum of critical activities that involve spending nonbillable time—corporate initiatives, operations management, business development, accounting, human resources, strategic planning, etc. As consultant David Maister notes, "What you do with your billable time determines your current income, but what you do with your nonbillable time determines your future."

Managing Investment Time

You should seriously consider how your firm can better invest some of its nonbillable time. Perhaps you need a more effective business development process. Or maybe you should have deeper follow-through on your strategic plan action items. Or you may need to improve your project delivery process. Undoubtedly, your firm's future depends on how well you invest nonbillable time on these kinds of activities. The following are a few suggestions for better managing what Maister calls investment time:

Define your strategic priorities. Perhaps you've already accomplished this through your strategic planning process. A common mistake firms make is they try to tackle too many initiatives at once, in part because they fail to estimate the time required to complete the desired actions. Some of you will remember my planning advice: "Don't plan what you won't do." Another way to state it: "Don't plan to do more than you're willing to commit the time to." It's better to pick only one or two initiatives that you can execute successfully than to try to address everything that seems to merit your attention.

Develop an action plan for each initiative. Another common planning mistake is failing to develop an adequate action plan. You need to define the required tasks in enough detail to define your resource needs, as well as to enable you to track progress toward your goals.

Estimate the level of effort. You should make a preliminary estimate to determine the appropriate number of strategic initiatives. Then for each action plan, you should create a more detailed estimate to define resource needs. You would never plan a project without projecting your work force

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requirements. So you need to take the same approach with internal, nonbillable "projects." When you've defined how much each initiative requires, you may need to scale back your action plans to fit the available time.

Budget nonbillable time. For each person you assign responsibility to an initiative, you should allocate each staff member the time required to do his or her part. In other words, treat nonbillable projects just like client projects. Be realistic about availability. In my experience, firms typically anoint people for an internal initiative but disregard how much time they can actually devote to it. Unless some of your employees don't have enough to do already (which is another problem!), I recommend a simple rule: Don't assign new responsibilities to people without offloading an equivalent amount of their current responsibilities. Neglecting this common-sense strategy is a main reason that corporate initiatives fall short.

Track nonbillable time utilization and hold people accountable. Just as we assign project numbers and job codes for billable work, I recommend doing the same for critical nonbillable initiatives. Likewise, we should track utilization for these assignments. If someone isn't spending the allocated time, they need to be held accountable. Here's the key: You have to give nonbillable initiatives the same priority as project work. Otherwise, you tend to constantly put them off to do project work (or other routine activities).

Although these strategies will help, to effectively invest nonbillable time, most firms will need to develop a different mindset. You will have to alter your traditional view of nonbillable time—that it is less valuable than project work. Approaching it with the same disciplined strategy that you use billable time will certainly help change that perception. Many of the most successful firms are already doing this. Is it time for your firm to start maximizing the unrealized value of all that nonbillable time?

Mel Lester of [The Business Edge](#) is a management consultant and trainer who specializes in helping technical consulting and design firms improve business performance by applying best management practices.



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Avoiding the Nightmare Interview

By Joanne G. Linowes

Picture this: You learn about a great prospective job and write a compelling proposal. You get shortlisted. You put together the precise presentation team to win the job. You create a perfect presentation with meaningful graphics and visuals. You deliver the shortlist interview presentation flawlessly. You await the selection results. You come in second. Or third. Almost every time. It is your worst nightmare.

What is Happening?

Today's presentations require advanced thinking as to what will appeal to selection committees. With more sophisticated decision makers, the rules that formerly worked for successful presentations are being rewritten. Firms bounce from technique to technique, hoping to find the sure-strategy that works—some flirt with the concept that shortlist interviews should incorporate elements of theater; some stick to the material in the proposal; some do not venture from the successful approaches of their firm's yesteryear. No surefire, guaranteed formula exists because presentations that win are an art form, not a science, and are influenced by the human touch and personal style.

Winning now requires a complex blend of political savvy coupled with bulls-eye content, psychology of audience appeal, people skills, and influential strategies. To save yourself from the nightmare interview, we can improve on the two most common perceptions of what works.

1. Use Visuals

Design professionals do not need to be encouraged to use visuals. Using appropriate visuals well is what makes the difference. Instead of falling into the PowerPoint™ trap, instead of trotting out the same photos of your firm's pride-projects-of-the-past, consider the entire range of visuals available to you—from simple to super. Simple is using an easel with flipchart pad and markers. Used well, this approach engages the selection committee like no other medium. PowerPoint is today's valuable and trusty tool. However, presentors often use it as merely as an outline for speaking. Ho hum—not exactly the selection committee's most memorable event. Let PowerPoint showcase your skills and organize the committee's listening abilities: use computer animation, bullet points for each presenter's segment, and one-at-a-time photos and renderings that clearly send the singular message you choose—put fewer items on the screen at one time and deliver greater impact! Save the super items, such as models, until the end so you can encourage interaction and control the transition into the Q&A.

As a team, decide when to use which and what purpose each serves. Visuals do much more than illustrate past work examples or tomorrow's proposed solutions—visuals have the compelling ability to create audience rapport, reflect your corporate persona, and demonstrate competence and confidence of the presenter.

2. Target your presentation to the selection committee and the project-specific issues.

Easier said than done! Your targeting is only as good as your information gathering. Within your limited time constraints, find a way to learn not only the standard things—the issues, what they think they want, how the project fits into the whole plan, but also how the owner and selectors feel about the project and what they expect from the design firm they seek to engage.

Reconnaissance for targeting your presentation begins before you begin preparing the presentation. Find out what the proposal preparers have learned. Check out what the end users think. Find out who the real decision maker is and if that person is even on the selection committee. When looking for clues as to how the owners/selectors think and what issues are motivating this project, what should you do—should you go back and re-read your

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proposal? Is this conducting reconnaissance? No! This is the fatal flaw. Instead, go back and re-read the RFP/RFQ. The proposal reflects your thinking.

Another aspect of targeting is critical for success. Targeting also means delivering with a range of presentation styles to keep the entire selection committee engaged at 100 percent attention, 100 percent of the time. Although you do need to communicate a sense of team and demonstrate overall flow, you will want to incorporate a range of presentation techniques and personalities. Different roles on a project demand differing personality types. Consider how this concept applies to your firm and the specific project, then create a presentation plan that addresses key issues, demonstrates key personnel who are the best for the job, and keeps the interview lively.

To prevent the nightmare of coming in second yet again, explore every cliché and assumption that guides how you plan, prepare, and practice your shortlist interviews. Challenge your approaches. New thinking will help you achieve the goal of making the impression that counts!

*Joanne G. Linowes, founding principal of **Linowes Executive Development International (LXDi)**, is a presentation coach and communications specialist exclusive to the design and building professions. She coaches shortlist interview teams to win, conducts in-house training programs in presentations for business development and community relations, and designs reputation-building campaigns.*



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Being Different—and Profiting From It!

By Scott Braley, FAIA, FRSA

You know the frustration—you're right for the job, yet the client says he or she can't see much difference between you and your competitors. Worse, someone says price will have to be considered—and will likely become the deciding factor.

Differentiating your firm from the competition—ethically and effectively—can mean all the difference when it comes to getting more and better work, fostering mutual respect, and securing fees that reflect your real value.

Though difficult for some of us to accept, architecture has a high percentage of what marketers and consumers know as “commodity” firms and services—those that have reached a stage of wide acceptance among consumers (i.e., potential clients), a degree of consistency among and across firms that now appears as “sameness,” and a fairly consistent level and expectation of quality regardless of provider. With the onset of these and other similar characteristics, we might/must admit that our industry may quickly become a buyer's market.

When the market favors the buyer, firms must differentiate themselves from the competition; they must stand out. Successful firms that want to stay that way must focus on differentiation.

To get our arms around differentiation, a potentially complex concept and set of strategies, it helps to understand the stages of differentiation, as well as the ways in which firms can and should differentiate.

There are five stages of strategic differentiation. We like to identify them as:

Strategic Marketing Judo—differentiation by not being different. In this stage, you strategically rely on the fact that your competitors will work hard to appear different and stand out from the pack. Thus, while all other firms are changing their appearance and approach to a given opportunity, you make no effort to change or be different. Thus, as others move and change, you will stand out (be differentiated) by definition by the mere fact that you remain true to your history and proven approach. Consistency and evidence-based success is your hallmark.

Strategic Highlighting—differentiation by drawing attention to key strengths. At this stage, you specifically draw attention to key strengths of your firm, your team, or your approach. (Remember, highlighting means just that—you cannot highlight every aspect.) Perhaps you draw attention to a key aspect of your understanding of the client's needs or project situation. While you appear to be (and are) generally competent and capable, as do all “commodity” competitors, you stand out because of your key strengths.

Strategic Masking—differentiation by changing outward or surface appearance. In this stage or strategy, you change how you appear to the client. Your firm or your approach may change very little, but you present the characteristics of your firm in an entirely different manner; you appear in an entirely different light, as it were. This strategy includes covering and screening the less desirable aspects of your firm or approach by neutralizing or diminishing their importance in a given project situation. For example, you can mask a relatively high fee by pointing out that your fee, as such a small percentage of the overall project investment, should not be a deciding factor. (Note: When we use “masking” as a concept marketing term—we do not, nor would we ever suggest you take, any action or practice that is in any way unethical or unprofessional.)

Strategic Toning Up—differentiation by improving the substance of key elements. At this strategic stage, you make fundamental changes in the

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substance of your firm, your team, and your approach. You differentiate yourself from the competition by actually changing key characteristics or aspects of your firm, team, or approach. These incremental and selective changes can be designed as temporary or long-term/permanent. A simple example is firm location—you may propose to set up a temporary project office as a way to better serve a client, thus standing out from competitors whose offices are in more remote locations.

Strategic Transformation—differentiation by a fundamental makeover. In this stage, you concentrate on fundamental differentiation by making changes of genuine substance that span the full gamut of your firm, your team, and your approach. Firms usually achieve this ultimate stage after progressing through, or experimenting with, the toning up stage. In this strategic approach to differentiation, your firm will make changes in its core and in the essential characteristics that define your firm and/or the services that you offer. You appear different because you are substantially different.

These stages are not necessarily progressive—that is, a firm does not always move from one stage to another and stay in that differentiated mode. Rather, key leaders and marketers will select the best stage of differentiation to use—selected and designed specifically to fit the needs of each client situation.

As you consider the stages of differentiation available to you, we suggest that you combine these with the three overarching areas of differentiation. In so doing, you can create a form of strategic differentiation matrix, which will guide your decisions for specific clients and projects. We suggest the following three key areas of differentiation.

Image and promotion—How do you appear to the client; how do you deliver your marketing message?

Behavior and level of service—What actions do you take; what is the level of service you provide?

Capability and results—What is your core capability and competency, how competent is your team, how well will you perform, and what results will you deliver?

Differentiation may very well be the key to success in many of your current and targeted future markets. These ideas are designed to help get the juices flowing and help you frame your approach to being successful in highly competitive and “commodity” markets. Our goal is to help you stand out from the competition in a practical, ethical, and effective manner. Go ahead, be different—you and your clients will like the results!

*Scott Braley, FAIA, FRSA, is founder of **Braley Consulting & Training**, an Atlanta-based practice that provides consulting, training, facilitation, and assessment services throughout the A/E/C industry.*



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Fast-Track to Must-Have Status

By Charles Nelson, AIA, FRAIA

This article summarizes a workshop, Fast-Track to Must-Have Status, at the AIA Knowledge Community Fall Conference & New York Chapter Conference held October 27–29, 2005, at the Center for Architecture in New York City. The conference theme, Getting to Great, used the best-selling book, *Good to Great*, by Jim Collins, as the starting point for a rich collection of practice management discussions. This seminar focused on how younger professionals can leap frog ahead to become the most valued team member in the practice if they desire. Perhaps an appropriate subtitle to this seminar would be Unleash Your Inner Eagle, an idea that emerged in the AIA 2003 Practice Management Fall Conference—interpreted here by Melbourne architect Michael Lindell.

Of course, this topic is important not only to younger architects who want to lead the pack, but also to the leaders of the practices that employ them. Practice leaders need young people who have the skills and drive to become the best that they can be.

These talents bring with them another issue—how practice leaders can keep these people, instead of watch them rocket off to better futures elsewhere.

Collins' Five-Level Hierarchy

Level 5

Executive—Builds enduring greatness through a paradoxical blend of personal humility and professional will.

Level 4

Effective Leader—Catalyzes commitment to and vigorous pursuit of a clear and compelling vision, stimulating higher performance standards.

Level 3

Competent Manager—Organizes people and resources toward the effective and efficient pursuit of pre-determined objectives.

Level 2

Contributing Team Member—Contributes individual capabilities to the achievement of group objectives and works effectively with others in a group setting.

Level 1

Highly Capable Individual—Makes productive contributions through talent, knowledge, skills, and good work habits.

As Collins notes in his book, Level 5 people are very rare. The majority of architects and other design professionals I have worked with are somewhere between L 2.5 and L 3.5, based on the above descriptions. Whatever level a person is at, both that person, and the practice employing that person, have a powerful common goal in him or her achieving the next-higher level. As the facilitator for this workshop, I first presented a small group of slides from PSMJ Resources' two-day Project Management Bootcamp® program on time management and communication, as a way of focusing the workshop on these issues. The presentation included the results of two interviews with the managing partners of two Melbourne design practices. I asked them what qualities they valued. The following are their responses:

First Practice Leader

"Leave a trail"

Elegant and restrained analysis of the problem

What is the design approach?

How did you reach the design solution?

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Capacity to listen
With this capacity, comes empathy

Communication elegance
Be able to communicate the essence of an idea

All the rest can be learned!

Second Practice Leader

People skills—empathy
Talk, walk, be liked--Optimize skill sets
The larger the organization, the greater the opportunity for varying skills, and the more important they are
Have good business skills, a "go into battle" attitude
Good design skills, good teacher

Strategic thinking—like chess
Long-view positioning—5+ years
Succession—think about how the practice grows and changes

The remainder of the workshop consisted of the following exercises, and produced the results indicated. The small group of six participants split into two groups of three.

Brainstorming the Fast-Track Skills Needed

Each group worked to identify the key skills needed in their practices, resulting in a list of 13 items. This list was then voted on by a show of hands as to which were the most important. The results (ranked in order of votes) were:

- 6 Communication—the ability to effectively and efficiently convey information
- 5 Problem-solving and problem-prevention
- 5 Time management
- 5 Ability to prioritise and evaluate
- 4 Use and leverage resources—delegate—don't waste others' time
- 4 Good listener
- 3 Teaching and mentoring
- 3 Analytical
- 3 Business savvy
- 2 Ability to deal with adversity
- 2 Multi-tasking abilities
- 1 Design skills
- 0 Technical know-how

How do People Gain These Skills?

The top four items then became our focus for the rest of the workshop. Each groups selected two of the top four, and workshopped methods to gain these skill. At the end of this exercise, each group selected from their list what they considered to be the best remedies, as follows. The group selecting communication and problem-solving/prevention skills combined them into one.

Communications and Problem Solving/ Prevention Skills Time Management Ability to Prioritize and Evaluate

Job shadowing—learning by watching someone who knows
Weekly meetings focusing on pitfalls, previews of actions, knowledge sharing
Yearly performance reviews, focusing on teaching points from them
Project debriefs
Time management training—Learn it!
Use the Stephen Covey 4-quadrant method
Time your daily activities and review results
OHIO (only handle it once)
To-do lists—find one that works for you
Be realistic
Experience and failure. (No short cuts here. Important that the practice culture permits failure without blame)
Setting agendas
Improve communication skills
Research issues

The introduction and presentation took one-half the time, and the workshop exercises half. The lessons from these discussions—and the priorities—come directly from the participants, making them more memorable.

Charles Nelson is a past chair of the AIA Practice Management Knowledge Community Advisory Group, has established the Melbourne office of PSMJ Resources, and is PSMJ Resources' project management trainer in the Asia-Pacific region. Information about PSMJ's project management Bootcamps can be found at www.psmj.com.





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Small Design-Oriented Firms: The Real Innovators (and Winners)

By Phyllis Dubinsky

In the world of architectural design, it is a feeding frenzy. Needing more and more work to fuel the engine, large firms continue to acquire smaller ones to gain market share and penetrate new markets. But increasingly, these seemingly insatiable hosts are using acquisitions as a means of snaring the elusive star design quality. Unfortunately, once captured, the smaller, more nimble and innovative design firm usually becomes buried in the bureaucracy of their new host. And often it is a recipe for disaster. I contend that small design-oriented firms can lead the market in a variety of areas without having to compromise and succumb to the larger firms. But don't forget your humble roots. Many of you started in large firms in the first place. You learned your craft and then moved on for all the same reasons you appreciate your independence today. Although going it on your own is sometimes daunting when you consider the resources available at the larger firms, there are alternatives. It helps to consider the independent film company model, which is running circles around large film studios.

The Model

The independent film company model, often a virtual company model (a concept simplified here for the purposes of this article), basically brings creative, agile, and frequently edgy stories together with the actors, directors, producers, and supporting players who are willing to take a chance with them. It is necessary to have a collaborative group of creative minds from the various disciplines who will put the whole project together and who understand the value of a stark edge and working together to maintain quality. The company lasts for the duration of the film (or project). Do they work together again? Only when it's right or if they start to create a special brand (think Scorsese and DeNiro—especially early on). Consider the independent films that now more frequently get word of mouth, create a buzz, build a loyal and knowledgeable following, and push the creative edge—films like *Sideways*, *Crash*, and *Brokeback Mountain*. The larger studios cannot afford (from a return-on-investment standpoint) these types of cutting edge films, nor do they have the resources to develop them. Although profitable for the independent, such films cannot fill the belly of the larger studios. Small design-oriented firms can, should, and do form these small virtual companies/teams to create a great project.

The Steps

Know Your Strengths

You are good/great designers; believe in yourself without being arrogant. If you have designed a worthy building type, make it known; for example, all the directors of college libraries should be aware of that incredibly innovative library you just designed.

Understand and Pick the Clients You Want

The clients who care about great design—and these days there are more and more who do— will want to work with you. They seek the voice and vision of the innovator and will settle for nothing less than great design. Find them, seek them out, and let them know you exist. Even the smallest project can bring great recognition and future opportunity.

Educate and Partner with Your Clients

This is a no-brainer. The more your client (and by that I mean the user, not a firm that may represent them) understands your vision, the better off you are. The relationship should be a supportive partnership, not one that is adversarial. The success of the New York Times building project is, in part, the result of a client who became so educated in building processes, the architect's vision, and sustainability issues, that they were able to push the design team and the contractor to achieve great results (See *Harvard Business Review*,

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October 2005).

Find the Best and the Brightest Firms to Support Your Efforts

Network and partner with programmers, engineers, and other specialists who know their craft and have contacts in areas you may not. And that also means larger firms that may support the documentation effort. This is critical. Remember it is your vision; find the firms that will support it and that buy into it. A large firm that has a depth of resources can be very helpful; just make sure it is the right large firm and that they will work with you as your partner. Interview them as you would any other consultant. Challenge each other and demand the best while you strive for a cohesive effort. The client will appreciate it too. The difference between this and teaming for a project is that you, as the visionary, must stay in control but be respectful of your partners in this virtual firm. They are your partners, not your adversaries.

Make it Known

Spread the word—published, spoken, and more. You are the visionary, but support your virtual company. Acknowledge the value of your partners in the press; they will do the same for you.

Support Each Other's Innovation

When small, agile firms get together they can act as a think tank. Their experience may be very deep, but they have not been limited by corporate constraints. Challenge each other to be the best of the best...it will be worth it.

Note: Special thanks to Al Grazioli.

Phyllis Dubinsky, principal of PDK Market Strategies, specializes in strategic market planning, especially with small firms that emphasize the branding of design. In addition to her practice, Phyllis teaches a graduate course at SCI-Arc in marketing and design intelligence.



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Using RFIs to Calculate External Failure Costs

By Cliff Moser, AIA, MSQA

To establish a successful cost of quality (COQ) program, an organization must first develop a program that is measurable, comprehensive, and designed to operate within its existing cost accounting system, according to Campanella in his book, *Principles of Quality Costs*. He identifies and calculates quality costs as prevention costs, appraisal costs, internal failure costs, and external failure costs (Campanella 1999). For the design firm, prevention costs are for staff training and education. Appraisal costs align with checking drawings and other contract documents before their delivery to internal and external customers. Internal failure costs are the costs associated with delivery or process failures such as incomplete or uncoordinated consultant drawings. External failure costs are costs incurred after delivery of the product or service. In the design firm, these costs include those associated with poor or unsafe design, incomplete and uncoordinated construction drawings, poorly delineated scope of work, and poor administration performance. External failure costs for the design firm are generally measured in contractor change orders, schedule delays, and owner litigation.

This article will explore how to use requests for information (RFIs) as a collection and measurement tool for assessing a project external failure costs and how to use that information to develop a COQ program.

What is an RFI?

For a typical construction project, the owner will hold separate contracts with the design firm and contractor. Using this type of contract means that all communication between contractor and design firm must be conveyed through the owner. As a practical matter, direct communication between the design firm and contractor is allowed but formalized. One of these communication tools is the RFI. In outlining the purpose and requirements for generating an RFI, the American Institute of Architects (AIA) provides the following guidelines. In section 3.2 of A201 the General Conditions for Construction (1997), the RFI process is described as:

"Before starting each portion of the Work, the Contractor shall carefully study and compare the various Drawings and other Contract Documents relative to that portion of the Work, as well as the information furnished by the Owner... These obligations are for the purpose of facilitating construction by the Contractor and are not for the purpose of discovering error, omissions, or inconsistencies in the Contract Documents; however, any errors, inconsistencies or omissions discovered by the Contractor shall be reported promptly to the Architect as a Request for Information in such form as the Architect may require." (AIA 1997)

Other guidelines, such as those developed by the University of California Facilities Managers, delineate further the procedures for using RFIs. In section 10012, titled Information & Procedure Instructions (RFI), the Contractor is instructed to submit an RFI for the following conditions:

- (a) Contractor discovers an unforeseen condition or circumstance that is not described in the Contract Documents.
- (b) Contractor discovers an apparent conflict or discrepancy between portions of the Contract Documents that appears to be inconsistent or is not reasonably inferred from the intent of the Contract Documents.
- (c) Contractor discovers what appears to be an omission from the Contract Documents that cannot be reasonably inferred from the intent of the Contract Documents. ...the contractor is to include, as the minimum 1) the drawing sheet number, 2) detail number if applicable, 3) specification section, 4) Contractor's recommended correction to the noted issue, and 5) whether there is a potential cost or schedule impact. (UCOP, 1996)

Thus, for the purposes of developing a COQ program for the design firm, an RFI could function as a useful survey tool, for it compels the customer

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(contractor) to identify the scope and scale of the external failure, to suggest a proposed solution, and to identify the cost impact.

Establishing the Metric

As outlined above, an RFI is written to notify the design firm when the contractor:

- discovers an unforeseen condition or circumstance
- discovers an omission or
- discovers a conflict or discrepancy.

Additionally, the design firm will require the contractor to use an RFI to:

- confirm information provided with an earlier RFI in a similar condition, and to
- confirm information provided in another manner, say, meeting minutes, a site visit or correspondence.

To ensure that the RFI metric is relevant to the design firm's existing accounting system, the COQ calculation should measure the time required for the design firm to review and respond to an RFI. Therefore, the metric should be based on the number of LH required to process the RFI based on its subject matter. To establish a LH metric, RFIs were sorted into the following categories.

Type 1: Graphic/Confirming RFI--This is identified by combining items 4 and 5 from the list above and constitutes a minor communication RFI. This is the most straightforward type of an RFI to process typically identifying or confirming information on the drawings and was determined to take approximately one to two hours LH for a full-time equivalent employee (FTE). Thus, a Type 1 RFI receives a 1-hour point.

Type 2: Coordination/Missing Information RFI--This metric is created by combining items 2 and 3 from the list above. Processing a Type 2 RFI is more complicated; it takes approximately three to seven LH FTEs. Thus, this type of RFI receives a 5-hour point.

Type 3: Code/Contract Information RFI--Beginning with item 1 from above and adding code-related issues and project scope errors and omissions, a Type 3 RFI is the most serious and complicated of RFIs to process, taking approximately eight or more LHs of FTEs. Therefore, for calculation, this type of RFI would receive a 10-hour point.

To establish its effectiveness as a measurement, this ranking was superimposed over two completed projects. To make the measurement useful from a COQ standpoint, the assessment should compare the RFI uncovered external costs to the project's actual costs. Design firms typically allot 20 percent to 32 percent of the project fee for use in the construction administration (CA) Phase. This is the phase in which RFIs are generated and processed. However, the document quality issues that generate RFIs are created during the earlier phases of the project. For example, a Type 1: Graphic/Confirming RFI might be a result of graphic (illegible information) issues created during the construction document (CD) phase. A Type 2: Coordination/Missing Information RFI would result from deficiencies during the CD and the design development (DD) phase. Type 3: Code/Contract Information RFIs are a result of serious issues created very early in the design and documentation process, during the Schematic Design (SD) or DD phase.

Historical Project Review

This article measures RFIs in two projects. Each project was considered successful by the firm because the project covered its profit requirement and had no significant schedule delays, minimal change orders, and no post-project litigation.

The first project was a new high school. Review of the actual labor hours and the assessed RFI counts uncovered the following conditions: **Table 1** shows Phase 0: Programming, Phase 1: SD, Phase 2: DD, Phase 3: CD, Phase 4: Bid and Negotiation (BN), and Phase 5: CA. The calculation RFI metric showed RFI LHs of 2,536 hours. However, 40 percent of this amount was attributed to consultant hours, in terms of engineering review and processing of their portion of the RFIs. Therefore, 60 percent of the identified RFI LHs are attributable to the design team. The firm's identified RFI external cost was 1,522 LHs, or 62 percent of the 2,440 budgeted LHs for the CA phase, as

shown in [Table 2](#). Thus, the external quality costs calculated using RFIs shows that 1,522 LHs were spent processing RFIs. This amount is 62 percent of the 2,440 LHs projected for the CA phase of this project.

The next project reviewed was a new laboratory construction. The RFI metrics show a pattern similar to the school project (see [Table 3](#) and [Table 4](#)). Design team RFI LHs again were 60 percent of the total fee, so the 5,252 LHs is netted down to 3,151 or 59% of total projected LH.

Analysis

Both projects show a net approximate 60 percent rate of RFI processing LHs to actual LHs. In addition to processing RFIs, the design team's scope of work during construction administration (CA) includes site visits, submittal review, processing pay applications, and so on. After a review of other projects, the firm should determine if 60 percent is a reasonable percentage of CA LHs for processing RFIs. As part of a quality improvement program the firm may seek to establish a lower target for future projects and outline methods for achieving the lower rate. A consultant metric could be developed from the RFIs attributed to their 40 percent or other identified portion of the work.

Another approach involves examining the more problematic RFIs in the Type 2 and Type 3 categories. As stated earlier, these RFIs may point to serious development issues during the early document process phases. One target for a quality improvement program could be to reduce the quantity of Type 2 and 3 RFIs by providing additional prevention costs during the earlier (SD and DD) phases of the project. One opportunity for improvement would be to allocate additional QA/QC time for use by the design team. In the lab example above, only 16 hours of QA/QC time (most likely appraisal time) was allotted for the entire scope of the project. If some of the raw labor hours shown under Arch I/II/III were reallocated into prevention costs during the scope of the project, measurement for quality improvement would be easier to identify.

Using RFI metrics to uncover and calculate project external failure costs can be an effective way to discover deficiencies in the construction document delivery process. How the information is used, either by

- 1) creating lower targets for Type 2 and Type 3 RFIs, or
- 2) reallocating external project costs during the CA phase into preventive costs during the SD, DD, and CD phases, will determine how the project team and design firm develop a quality management program.

Summary

Using RFI metrics can help project teams and firms understand the principles of quality costs. It costs more to fix drawing problems during construction than during production. With RFI costing, the firm can calculate these costs and establish systems for better appraisal and prevention models. Prevention costs produce the best investment; this is the core of quality costing. Most firms see the worth in spending more money on appraisal checking and coordination but refuse to recognize the value of a proactive prevention program based on integrated drafting training and quality assurance at the staff level. Identifying how much it truly costs to correct drawing errors (in staff LHs during CA) may encourage firms to change their approach.

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Managing is Designing? Exploring the Reinvention of Management

This conversation among GK VanPatter, Fred Collopy, and Richard J. Boland Jr. on the importance of design in management appeared in the 2005 *NextD Journal*, Issue 8.

GK VanPatter is CoFounder of NextDesign Leadership Institute and Partner in the innovation acceleration consultancy Humantific in New York. He specializes in the creation of strategies, tools, and organizations that enhance adaptability and innovation. He was an early advocate of extending designs' reach into the realms of business transformation, strategy development, knowledge creation, and organizational innovation. *NextD Journal* explores how the concept of design leadership is being rethought and reinvented as a response to the massive changes underway in the marketplace.

Fred Collopy, PhD is Chair, Information Systems Department at Weatherhead School of Management in Case Western Reserve University and Co-Editor of *Managing as Designing*.

Richard J. Boland Jr., PhD is Professor of Information Systems at Weatherhead School of Management in Case Western Reserve University and Co-Editor of *Managing as Designing*.

GK VanPatter: Welcome, Richard and Fred. I am delighted that we could get together for this conversation. I have been observing your Managing as Designing initiative at Case Western Reserve University Graduate School of Management and find developments fascinating. It makes for a great story from several perspectives. Many of our readers have likely heard about your activities there. For those who might not be aware, can you give us a brief overview of this initiative? How did your journey into design thinking begin?

Fred Collopy: Managing as Designing is a research program that aims to answer the questions, how can ideas from design inform and improve management? And, how can designing complement analyzing and deciding as core managerial skills?

Dick and I discussed the importance of design in management when we first met in 1988. But we have never had an opportunity to actually do anything about it until Dick's involvement in this design process that produced this building made it impossible to resist. As that process got under way, Dick's thinking, and many of our conversations, began to center on design issues. We found ourselves articulating many of the resulting ideas as principles and wondered if they were valid. Things such as "rely upon multiple models" or "don't fall in love with your first idea." We wondered more generally what role design thinking should play in management and what great designers could teach great managers. That led to the idea of bringing them together, which we did in June 2002. We invited architects, artists, musicians, choreographers, and product and software designers to join managers and management theorists to talk about these things. We decided early on to take a design approach to that meeting. Rather than call for papers, we asked people to produce short, provocative pieces, and to assume the attitude that these were rough drafts that would serve as the basis for conversations. It was a very productive session, and many of the participants expressed appreciation for the unusual opportunity to cross boundaries and think beyond the usual constraints of academic discourse.

Richard Boland: The journey began for me during my doctoral studies. My thesis was on the design of computer applications and how the pattern of communication between the system designers and the intended users affected the design of the system. The findings were that different protocols of communicating created different "problem spaces" for the designers, and that it was not so much a question of who had the "best" design, as it was a

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question of which problem space a designer used to structure their exploration. Questions of communication and design have fascinated me ever since. A key inspiration for both of us is the work of Herbert Simon, and his *Sciences of the Artificial*, which called for a revision of the curriculum in management schools based on design thinking. More immediately, I chaired the faculty committee that worked with Frank Gehry in the design of the Peter B. Lewis Building for our school and became reenergized about the power of and need for design thinking in management.

GK VanPatter: I can see many things to connect into here. Since you are both interested in the role of design in management and Richard in particular is interested in the impact of protocols and patterns of communications, I would like to suggest something unusual here before we go further. I suggest that the three of us do our own problem solving preference profiles and share the results with each other. *NextD* and our alliance partner Basadur Center for Research in Applied Creativity will provide the preference tool and the explanation. Our sponsor UnderstandingLab will visually map the profile results that we will then imbed in this conversation. I think you will find this to be a useful exercise that will inform our further conversation here. I will send you a couple of passwords so you can do your profiles online. Let me know if this is agreeable to you.

Fred Collopy: Sure.

Richard Boland: Sounds interesting.

Profile Results

GK VanPatter: OK, super. I hope you found that exercise useful. What I see here is that the three of us have very different profiles. No big surprise there. It is interesting to note that you two are engaged in the same discipline, but have very different profiles. (This is not unusual.) Fred and I are engaged in very different kinds of work but have similar profiles. This exercise tells me that you likely approach the Design as Management initiative in very different ways. This hopefully will help us construct this conversation. What I would like to do is move on now and come back to this as we proceed. Let me connect back to some of what you made reference to earlier.

Fred mentioned that through this initiative you are seeking to address two questions:

1. How can ideas from design inform and improve management?
2. How can designing complement analyzing and deciding as core managerial skills?

Having watched the DVD documentary presentation that you sent to me entitled *Managing as Designing* I understand that several years ago Case Western University hired Frank Gehry to design the new School of Management building there on your campus. I understand that you both observed and participated in that process as part of the client team.

From observing the documentary I am guessing that somewhere along the way you decided to try to utilize the Frank Gehry experience to help inform and answer your two questions above. Evidently you found numerous aspects to be very different from what is typically taught in graduate management schools today. Can you first tell us something about what you saw along the way in that design journey? What did you find to be most relevant to your two research questions? What surprised you?

Fred Collopy: Given changes in the administration of the university and the school that took place over the horizon of the project, Dick was effectively the client for much of the process. I was merely the client's friend and occasional therapist. I'd meet him for drinks and hear about how things were going. Usually when there were problems. But as we talked, I did pick up on some recurring themes. One of those was related to Dick's surprise at how much things would change from meeting to meeting. I also got to hear Jim Glymph (one of Frank's partners) give a talk at IBM's Watson Research Lab while the building was under design, and was struck by how his perceptions of the school were shaping the design.

One of the things that permeated the design of the building was a sense of the partnerships that define the place: between the faculty and students, and between the faculty and staff. Unlike most business school designs, which place the classrooms on a couple of floors at the bottom of the building, the classrooms are distributed throughout the Lewis building. One of the

classrooms is organized as an oval and another is designed to facilitate the formation of breakout groups. Both designs highlight the importance of discussion to learning. And rather than locating department chairs in the spacious corner offices, the department administrators were placed there, where they serve as magnets for department interaction and information sharing. All of these things capture values of the faculty that existed long before Frank showed up here.

Frank's processes were good at identifying them and then transforming the values into physical designs. One of the things that we saw along the way was the importance of keeping things liquid as long as possible. We didn't have that language until the workshop, but it was an idea that kept coming up. Things changed very much. The site definition, the relationship to other institutions in the area, the administrators that had to be satisfied – all were in flux throughout the design process. Something that surprised me was the way in which an idea generated in the earliest discussions survived to find a way into the building, with no additional discussion that I was aware of at all. That was nearly miraculous to me, because in management, innovative ideas often get either talked to death or dropped on the floor if they are not discussed and reinforced. Here, there were ideas that came up once, were seen as good, got into the designer's minds and showed up in the finished building without any further discussion or consideration by us. That was cool to see.

Richard Boland: One thing that struck me about working with Frank Gehry was the way he and his partners would present a model of the building and say, "This is not what we are doing." And it took a long time for me to get what they meant. They were working on ideas, but not the way management typically does, and not the way that we teach in management schools. In management practice and education there is an initial exploration of alternative approaches to solving the problem at hand, but once an approach is selected, the process becomes one of refining the solution. So when we would view a model of their design, we expected that it was a similar process. The model they presented was unfinished, but the finishing of it was going to be a process of resolving the multiple details that were suggested by the model.

We didn't expect that the next model would be quite different, and so we didn't understand the deep meaning of his admonition that "This is not what we are doing." The models were tools for thinking, not representations of a partially developed design. In comparison to what we see in management, or even in the highest levels of government, our leaders do not think as openly and flexibly about the solutions to problems we face. To use the federal government as an example, and considering large-scale designs such as Homeland Security, Social Security, tax reform or Medicare, it is as if our leaders do "the first damn thing that pops in their head". Working with Frank Gehry (and I am sure this would be the same with any great designer) put into stark relief the limited intelligence we bring to management problems.

A few other things that were quite striking about the design approach of Frank Gehry was his relentless commitment to functionality in the broadest sense. By that I mean he expected that we as clients would be asking for what was familiar to us, that we would not have opened ourselves up to new possibilities for organizing or for teaching and learning.

He worked with the faculty and students to challenge their complacency and push their thinking beyond their normal boundaries. That is how we ended up with classroom designs unlike anything we were familiar with. And it turns out that the most challenging ideas he got us to consider, such as the oval shaped classroom, have become the most sought-after teaching spaces. What Fred said before about the way that ideas raised in early meetings never got lost, is another aspect of that commitment to functionality. In fact, I can't think of a single program element mentioned in the many meetings with faculty and students that is not reflected in the design of the building. And many of the requests were contradictory, but rather than say "You can have it one way or the other, but not both", as I would expect in a management setting, they took the contradictions as a design challenge and worked at it until a creative solution was found.

GK VanPatter: Help us understand the broader context of this activity and why you came to find it important. Our readers are very familiar with the challenges facing graduate design education today, but probably less aware of the challenges facing graduate management education. If you look back over the last 10 years of graduate management education, what is it that you see there as the central dynamic? What is it that brought you to this moment

where you were in search of something outside of yourselves?

Fred Collopy: Well, management education has taken very seriously the need to produce students who can do analysis and make decisions. We are good at that, and students really do leave with a set of skills that most did not arrive with. And these skills are relevant to many of the tasks that managers face, particularly in situations where there are identifiable constraints on the manager's activities. But the world is changing, and the boundaries are no longer so well defined. For example, who is responsible for the disposal of an empty cartridge that contains a toxic residue? There are any number of ways of seeing this. The traditional view would be that the customer purchased it and, as its owner, has assumed that responsibility. But some companies are drawing the boundaries around that transaction in new ways. They are designing mechanisms to participate in the disposal (or recycling) of the products they produce. This is partly a reflection of their willingness to see their own system differently, to see it as part of some larger systems. When you do that, you enter the realm of design, because as systems are nested within one another, traditional methods of analysis and understanding are inadequate. Without clear boundaries defining the limits of your analysis, what function do you optimize? Without fairly simple objectives, how do you measure your success? Designers know, and a design way of thinking reinforces, that for most interesting problems no single solution is the right solution. Another solution might provide a different set of benefits, problems, and tensions that are in some sense better. Another solution might shift the way of thinking about the problem altogether.

Managers are growing ever more comfortable with this new world. I don't want to suggest that we are swimming against the current here. Managers and management professors are aware that the world demands people who can see beyond the next quarter's numbers and beyond their own organization's narrow interests. But most of the tools we give them have a century of assumptions built into them. These assumptions tend to favor a decision-making paradigm. It is time to provide another set of tools that support a designing paradigm. Not to replace all that we have accomplished, but to augment it.

Richard Boland: Over the last 10 years, business has seen that the design of products and services are critical to their success. They have seen that collaboration across organizational boundaries is essential and that the familiar ways of doing business are just not good enough. In business schools, on the other hand, we see a growing emphasis on financial analysis and financial engineering--a narrowing of student vision and an effort to have one way of seeing business and its value displace all other ways.

Along with that shrinking scope of attention in business schools to a smaller range of issues centered on finance, there is a parallel growth in emphasis on analytic techniques in other disciplines. This is fine in moderation, but has a debilitating effect when taken as a whole over time. By this I mean that in order to introduce analytic techniques and build skills in using them to make decisions among alternative courses of action, business schools focus more and more on stereotypical alternatives open to the decision maker. Coming up with a new alternative course of action, which is not readily modeled by existing decision-making techniques, is suppressed. Students are trained to see alternatives that fit into their models and that can be analyzed by their decision techniques. The result is a failure of imagination and a tendency to reproduce the past.

So it is the failure of our business schools to create a truly educated person that we are reacting to when we reach out to design and design thinking. The truly educated person brings the full range of human experience to their engagement with the world. They are open to critical thinking and to exploring new relations and domains. We believe that a growing emphasis on design can provide an antidote to the overly constrained view of reality that business schools present their students. For a given situation, design opens up questions of "what is functional?", "what is it we are trying to achieve?", and "why are we defining the situation in this way?" that a business student tends to accept as given.

GK VanPatter: Understood. Yes I am familiar with the forces of decision making and judgment. In doing InnovationLab work we often find large corporate organizations trying, with good intentions, to get to innovation by increasing the amount and quality of their decision making. Of course that is not possible. Decision making is a form of convergence. They do that because of their own corporate cognitive profile, but let's come back to this.

I want to ask you about the process that you saw when you worked with Frank Gehry and how it may or may not connect to how folks from multiple disciplines are learning innovation skills elsewhere. I saw in your DVD documentary that you had, in the context of your workshop (which occurred after the building was constructed), analyzed your experience and from that created a little organizing architecture of five overview principles or learnings.

- Multiple Models
- Thrownness
- Collaboration
- Liquid-Crystal
- Legacy

In creating the architecture, you seem to be engaged in a form of de- abstraction or sense making. You seem to be striving to make the experience repeatable, to transfer the learnings from the experience to a different realm not connected to building design by synthesizing and codifying the principles. It would seem that you might be driving towards suggesting that skill-building for managers could occur around the principles. Correct me if I am wrong.

What I am driving at here is the degree to which the design process and its basic principles were being made visible to you, understandable to you as it was in progress. Was there a visible process present? Did Frank and his team ever draw you a picture of the process that they were using? Did they have the principles codified enough to be able to explain them? Or was this something that you took it upon yourself to do afterwards?

Fred Collopy: The basic idea of searching for principles that are more generally applicable is one that always interests me. This whole project is in some sense motivated by the question "What can great designers (of all sorts) teach organizational leaders about doing great design?" The very question invites generalization from one realm to another. So, in a sense all of the process and artifacts are about that kind of generalization. Of course, there is a danger in that. There is always the possibility that in transporting ideas from one domain to another, their vitality will be lost or they will be misapplied. That's why a program of empirical research is called for. And the work that Dick, Kalle, and Youngjin are doing in the construction industry is a good example of such field-based research. We're also doing work around developing representations and interfaces that invite managers to think more like designers. But these things are in an early stage.

I have also looked at other designers in an effort to better understand the principles that can be derived from their practices. Maya Lin, another great architect and designer, has explored the elements of her design process in her book *Boundaries*. Her work reinforces the ideas that it is important to use multiple models and to accept the condition of thrownness. It adds the idea of an intuitive gesture. She talks about creating a balance between analytical study and, "in the end, a purely intuitive gesture." And both Lin and Joe Paradiso of the MIT Media Lab provided insight into the importance of another design principle, the importance of "thinking with our hands." So, there are many principles emerging beyond the five that you see on the video. This is part of our ongoing effort to articulate a vocabulary that will help managers to engage in design thinking.

Richard Boland: Actually, the five themes in the DVD came from the workshop discussions. We had two very talented filmmakers, Tom Ball and Brian Neff from Telos Productions in Cleveland, interview the participants and capture their reflections during and immediately after the workshop. The DVD is an edited compilation of the ideas that emerged in those interviews. Some of those design themes came from Frank Gehry directly, most importantly from his discussion of trying to keep a project in a liquid state in the face of so much pressure to crystallize it. The theme of multiple models came from observing Frank Gehry's design process during the construction of Weatherhead's Lewis Building and from the description of his design method he gave during the workshop. The theme of collaboration was introduced by Lucy Suchman, who is Professor of Sociology at Lancaster University. It was her way of highlighting the distributed nature of the design process, from her own research and from Frank Gehry's presentation. Thrownness, which recognizes the complex set of conditions and forces already existing in any architectural or organizational design situation, was introduced in the workshop by Karl Weick, Rensis Likert Professor of Organizational Psychology at Michigan, and is based on Heidegger's philosophy of being in the world. The importance of legacy and a manager's need for an awareness of the legacy of design they create was raised by Sandra Dawson, director of the Judge

Institute of Management Studies at the University of Cambridge. It was based on her own reactions to Frank Gehry's talk at the workshop and on her work with Boards of Directors in the UK.

The DVD is available free from our Web site at design.case.edu, and its content is quite different from the *Managing as Designing* book (Stanford University Press, 2004) which has 37 chapters on various design themes contributed by workshop participants after the event. Some chapters from the book are also available from the Web site.

As for Frank Gehry's design process, he was remarkably open about it during our building project. In fact, his openness has continued over the last three years by cooperating with us on a National Science Foundation project to explore the innovations in technologies, work practices and organization strategies and structures that accompany his design practice. We, along with Professors Kalle Lyytinen and Youngjin Yoo from our department, are studying a number of his completed and ongoing projects and are tracing the innovations that flow from his design methods into the contractors, construction companies, and engineers on his projects. Papers from that study are under review at research journals and are available at its project site <http://infosys.case.edu/path>.

GK VanPatter: OK, I am seeing numerous threads floating through our conversation. Many of them are rather difficult to grab hold of and ground. There are some formidable issues here and, frankly, I am not quite sure how to approach them all in this forum. I am trying to think in mid-air about the best way to connect the dots across this landscape. Above all, I can see that you are seeking to help a new future arrive for business managers. This gets a little tricky. Let me try this: I'm guessing you must know that architecture is looked upon as one of the early models for the kind of collaboration and teamwork that is going on increasingly in organizations today.

I am also guessing that you know a lot has happened in the marketplace in the last 25 years in terms of the evolution of the expertise and where that kind of best-practice knowledge now resides. I spent many years in the architecture business so I know how the dynamics typically work there, and the state and focus of the tools. It was in the quest to find more adaptable innovation tools that I embarked, many years ago, on a journey outside that business.

I'm also guessing that you are aware that there are many ways to practice design today. The celebrity/master as designer/leader is only one model. Let's not forget that many designers are business managers and leaders too. Since that traditional celebrity/master model does not scale particularly well, it is one that many design business leaders have long since moved away from. Now, Frank Gehry is among the most famous architects on the planet, but if we separate the celebrity, the person, from the model for a moment and just look at the model itself, some interesting things to think about come into focus.

If we look at the types of challenges in the model, the operational dynamics of the model, the degree to which the dynamics are codified and then juxtapose all of that with the apparent urgency of the innovation and adaptation challenges facing your community, this is where I get a little confused by your initiative.

Other than the fact that Frank was physically there working on the design of your new building, I'm not sure why you would choose this model to be the focus of your study. Certainly connecting any academic study to a high-profile celebrity would likely translate into increased attention. And hanging out with Frank would be interesting, but the model fit seems a little odd.

If the objective is to help business managers learn innovation skills, to be able to do more than make decisions, why not choose a model that more closely syncs with the dynamics of how organizations are organizing for work and innovation today? Why not find a model where the challenges being addressed are closer in size, type, and fuzziness to those which managers and organizations face today? Why not find a model that was further along in the codification cycle so you could begin teaching such skills to managers sooner rather than later? Why start from square one with a model that is in the very early stages of codification and has only tangential connection to the dynamics that organizations and managers face right now?

Richard Boland: Our conversation with you was initiated around the *Managing*

as *Designing* DVD, which documented the first workshop held in our school's new building, and featured its architect, Frank Gehry. But there were other designers and artists who participated in the workshop and contributed to the book. During the workshop, the "great man" image of design was debunked, which is why the DVD emphasizes the necessity of collaboration. We agree with you that Frank Gehry is not the best model for business managers as designers, and that is why we are working with IDEO, Samsung, IBM, the Cleveland Institute of Art, and other groups on concrete changes to our curriculum. Let me summarize just a few of those efforts.

First, we are working with IDEO to develop a new course in our MBA curriculum based on techniques from their design practice. They have adapted their industrial product design method for managers as a guide in addressing organization design problems, and we will be teaching that as a course, with their participation, beginning this fall. We have just completed a program in which our Executive MBAs have a two-week international business experience, which included a visit with Samsung Design Center and presentations on their methods for making design the central element in their corporate strategy.

Lee Green, head of the worldwide corporate design initiative for IBM, has been kind enough to be a guest in our classes, helping students to understand how they approach the problem of organization design from the customer perspective. And we have joint classes with the Cleveland Institute of Art, co-taught by faculty from each school, in which business and design students work together in teams to develop a new business plan. In addition, to our book *Managing as Designing*, Betty Vandenbosch, who is a member of our faculty, has developed a wonderful framework for applying a design approach to business problems, which we also use in some of our courses. (*Designing Solutions for Your Business Problems*, Jossey Bass, 2003). But we don't see any silver bullet out there, and we believe that the most powerful practices for managing as designing have yet to be created.

The important point for us is not about presenting the "correct" approach to design for managers, but is about transforming the management school curriculum so that we begin training future managers to think of themselves as designers first and foremost. It is the question of their self-image and sense of identity that is the major leverage point for us. If we can begin changing managers' expectations to include a belief that design is one of the centrally important responsibilities they will face, we will have gone a long way toward our final goal. We try to expose our students to a variety of design methods, with an emphasis on their need to develop and enrich their own personal design attitude.

To us, the role of the university in professional education is not to impart techniques, but to stimulate a deep curiosity about important issues and begin students on a life long journey of self-education and reflection on their practice. If it becomes commonplace for managers to see themselves as designers, and to approach management problems as design problems, we will have achieved our goal. The mental framework they adopt to guide their design thinking and the organizational practices they develop to make a design attitude a reality in their workplace is intentionally left as an open issue for them to experiment with.

Fred Collopy: Your concerns were actually shared by many of the participants in the workshop. Lucy Suchman was very direct in challenging what you refer to as the "celebrity/master" model of designing. Karl Weick's introduction of Heidegger's thrownness certainly positioned anyone who engages in design as part of larger systems.

And Kalle Lyytinen argued that "creating illusions of one idea of design is dangerous: it hides important differences in many interventions into the future world." So, while I would not dignify our thinking on this topic as being sufficiently refined as to constitute a model of design or of managing as designing, I think that the ideas we are playing with are richer and more varied than your question suggests.

As for looking to the models that organizations currently use, the point of our work is to bring in new models. Our supposition is that the current models, even those used in some of the best organizations are inadequate to the tasks facing us today. Fundamentally, our question is this: Does all of the learning that has been accumulated in the various areas of design offer generalizations that might be useful to management more generally? We think that it likely does. Both descriptive and prescriptive thinking must take place. But, in general, we don't expect that focusing on current management practices will

be terribly useful. The decision-making paradigm is simply too pervasive. There is plenty for which that approach works, but on its own it seems not enough.

Paul Kaiser provided a magnificent piece on creative collaboration. Paul, a digital artist who has worked with Merce Cunningham, described how Merce Cunningham and John Cage collaborated by working independently until the last possible moment. How many managers today would consider collaborating in such a manner? Not simply tolerating such independence, but embracing it. Clearly, the Cage/Cunningham model is not the model for collaboration (as Kaiser himself points out). Rather, it provides managers with a new way to think about what collaboration is. And, taken with others, such notions have the potential to enrich our vocabulary of collaboration, so that managers approach it in ways that are varied and contextually relevant, rather than in the way prescribed by whatever management book happens to be in airports at the moment.

GK VanPatter: I'm sure our readers would be interested to know who the designers were that you invited to participate in your workshop and book? Did you have in mind creating a book when you set up the workshop?

Fred Collopy: We invited a large range of designers and design-related professionals, some of whom were unable to join us, so I will only mention those who were able to attend. In addition to Frank Gehry, I have already referred to Paul Kaiser, who designs a wide variety of art installations. To me his most interesting work is done with choreographers. In it he blends dance and computer graphics. Joe Paradiso of MIT's Media Lab had worked for a very long time on synthesizer design and most recently has been doing fascinating stuff on simple interfaces for interaction and music making. John Nottingham and John Spirk of Nottingham and Spirk are product designers who are responsible for a long line of innovations in consumer products. They have over 260 patents under license and in production. Kalle Lyytinen designed and developed the software tools that are used by Nokia and others to create the interfaces used in mobile phones. Bill Buxton has designed a variety of computer-based systems, including Maya. Alan Preston has headed up the effort to redesign the Australian tax system. And we also had a number of artists, who while not necessarily designers per se, encounter many of the same issues. We had Jurgen Faust, a digital media artist, and David Demming, a sculpture, both of the Cleveland Institute of Art.

There were also people who have been observing the design process from an academic point of view such as Richard Buchanan, then Dean of Carnegie Mellon's school of design (who at the last minute was unable to attend, but did contribute to the book), and Nicholas Cook, a leading musicologist. Sten Jonsson, from the Gothenburg Research Institute has studied collaborative design at Volvo for many years, most recently following the joint efforts of Volvo, Mitsubishi, and NedCar (itself a collaborative venture) in the design of a new, cross platform premium luxury car. We also had Sue Helper, whose studies of design collaboration in the auto industry led to the identification of the now well-known phenomena of "pragmatic collaboration" in which firms are seen to cooperate on design at the same time that they compete in production and marketing. Alexander Tzonis, now a professor of architecture, who is the leading scholar on the work of Santiago Calatrava, was also present at the workshop and contributed to the book.

Richard Boland: But, of course, everyone you invite to such a workshop is not able to make it. Among those we invited but were unable to attend were architects Maya Lin and Rem Koolhaas; software designers Terry Winograd, Pelle Ehn, and Timothy Berners-Lee; artists Victor Schreckengost and John Maeda; composers Lyle Mays and Marc-Andre Dalbavie; and former Chief Scientist at Xerox, John Seeley Brown. Karl Gerstner, the graphic artist, was unable to attend, but Fred went to his home in Switzerland to visit with him and get his ideas on design for inclusion in our planning.

GK VanPatter: That's quite a lineup. You seem to be looking at, hunting through a terrain that extends beyond design. One of the things that I see here is that the terminologies of "art" and "design" are often being intermixed under the banner of Managing as Designing. I am sure you would understand that this intermix would be of concern to some in the design community. What Merce Cunningham and John Cage do is very different from what IDEO does, for example. Obviously you sought to capture a multitude of perspectives on design from many experts, including some designers. Do you have any kind of lens for looking at and making sense of the diversity of activities, approaches and frameworks that are described here and in your Managing as Designing

book? For example: Where does the Appreciative Inquiry model fit into the picture in comparison to the Pragmatic Collaboration model or the Gehry model? Other than inviting a diversity of experts to the workshop and or to write an essay in the book, how do you make sense of the universe that you have assembled here?

Richard Boland: For me it's all about the display of a design attitude. That is what we sought and hoped to bring to the table at our workshop. We were after participants who display a sense that there is an opportunity and even a necessity to create something that has never been seen or heard or experienced before. We wanted to bring together people from a wide range of disciplines who struggle at making a statement that flows from their own urge to make a unique contribution in a world that is not as desirable as they would like.

Fred Collopy: I find the classic distinction between art and design a little useful here. Art is generally about self-expression, whereas design is typically in the service of others. So designers can function as artists and artists often make design contributions. Given the context of our workshop, I think that even those who view themselves primarily as artists took pains to engage in the dialogue from a design point of view. But cutting these things in this particular way is a bit counter-productive as well.

At any given moment I don't know if I am functioning as a scholar, computer programmer, teacher, scientist, artist, designer, spouse, father, community member, critic, writer, performer, or consumer. At my best moments, I suppose it is all of those at once. And in any case, I know that to do any of those effectively, I must be willing to analyze, understand, articulate, decide, design, criticize, use, conserve, choose and a great deal more. I hope that education can help me in doing all that.

GK VanPatter: For most organizations, the days are long gone when a couple of people collaborating could solve the challenges facing them in the complex marketplace. Rising complexity and compressed timeframes are two of several drivers behind the wide spread adoption of the cross-disciplinary way of working, solving problems and generating opportunities. Has this figured into your thinking about "Managing as Designing" and the kinds of models that you seek to include in your program?

Fred Collopy: One of the things that I am prone to do is question presumptions. I am not sure that it is true that for "most organizations" important challenges cannot be addressed by a couple of people. Most organizations only have a handful of people in them. Of course, many organizations are large and many more are middle-sized, but most are quite small. Nonetheless, we are interested in modes of thought that should be applicable across contexts. Our colleague, David Cooperider, has developed a method of organizational transformation that is known as Appreciative Inquiry. The method was originally intended to stimulate positive psychology-based innovation in organization design in small group settings, but it scales quite effectively to a company the size of Roadway. He has also applied it to organization design problems at the U.S. Navy and the United Nations. If the core ideas are sound, people will find ways to employ them in a variety of contexts.

Richard Boland: That being said, the workshop included designers and design scholars that are involved in large-scale, multi-organizational design and transformation processes. As noted above, Sue Helper and Sten Jonsson, have studied such design processes, and discuss them in their contributions to the *Managing as Designing* book. The architect Frank Gehry is involved in some very large, high-risk, multidisciplinary projects, and we have been privileged to study them.

Right now, we are completing a National Science Foundation grant on collaboration in the architecture, engineering, and design industry. In that study, we are following a number of projects by different architects and structural engineers with a variety of construction firms, including Hoffman Construction on the West Coast, Hunt Construction in the Midwest, and Skanska Construction on the East Coast (now the largest builder in the United States.). We are studying how organization structures and strategies, as well as technologies and work practices, must change in order for large-scale, cross-discipline innovations to succeed. This is a fascinating project that is leading to some very interesting findings about distributed work, collaboration across sub-cultural levels within and between organizations, and required changes in contracting and risk sharing in order to build a high-performing

project organization.

GK VanPatter: Well, Fred, questioning assumptions is what we are doing here, so I am certainly all for that. It is true that many design school and business school educators operate small businesses. Often the results are that those models become intertwined in curriculum orientations and in the default assumptions around the program itself, but let's not get such dynamics confused with how challenges for designers are changing in the marketplace, how people are working and what client organizations are trying to figure out today. This is the real-world challenge/opportunity space that we are interested in here. Organizations are smart. They already know how to put two people in a room. They already know how to do linear processing. Let's recognize the "throwness" of where we are. :-) What they are trying to figure out is how to get humans from a multitude of disciplines to work together in parallel to tackle increasingly complex challenges and marketplace opportunities in compressed time periods. A whole lot springs from that fundamental challenge.

If one misses that, it is possible to spend a lot of time exploring this "design" thing without understanding how design is itself being required to change as a result of marketplace forces. You and I both know that it is unlikely that Frank Gehry, Rem Koolhaas, Maya Lin, or any design celebrity worry too much about how the marketplace is changing for designers. It is unlikely that you would see a reflection of these change forces in any of the celebrity models. That is another reason why we do not look for the future there. A lot hangs off awareness of those change forces, including insights into what models and tools we should be looking for and why. Without that recognition, we are on an Easter egg hunt.

Increasingly, I am seeing business schools interested in the design thinking thing. Often that interest seems to translate into a general interest in all kinds of divergent thinking models to counterbalance the convergent, decision-making thinking models that they have been teaching for generations. Of course, studying divergent thinking in general leads to a different place than studying design. Studying design remote from the market forces that are reshaping it also leads to a different place than studying it in that context. With the exception of the essay written by the folks in the transformation group at IDEO, I did not see much reflection of that marketplace context in the *Managing as Designing* book.

That is not to say that I would not highly recommend your book to any of our readers who are interested in how business schools are gearing their students up to compete directly with students emerging from our design education institutions for innovation leadership roles and even design leadership roles. It is a fascinating window into a phenomenon that is well underway and one that we have been trying to raise awareness around since we launched *NextD*. We keep harping on the simple but rather harsh reality that today designers emerging from our design education institutions now have to compete in the marketplace for innovation leadership roles. This book is an important benchmark, an important artifact in the documentation of this transformation in progress.

Of course, it would be easy to poke fun at the notion of scientists, musicians, dancers, artists and business-trained folks writing about design, but the fact is there are some very interesting observations from outside the known design universe in this book.

If I were a heart surgeon, I might also find it useful, in the spirit of open-minded discovery, to see what scientists, musicians, dancers, artists, and business folks thought heart surgery was, but I'm not sure that I would consider the outcome to be a heart surgery book. Everyone can do that heart surgery stuff, you know. You just have to ask an artist what heart surgery is and get into the swing of things.

As we turn the corner toward home on this conversation, let me ask you at least two more difficult questions. An insightful skeptic might look at this picture and suggest that there is more going on here than the discovery and celebration of design. Some might suggest that what is really going on in the transformation of business schools is the reconstruction of the highest form of value. For years, business schools have done a great job of selling the idea that decision-making and convergence was the highest form of value.

In the new transformation we are seeing a new depiction by the business schools, a new recognition, but it seems to have a twist. Not only has the highest form of value been reconstructed, but who delivers that value is being transformed in parallel. Guess who is moving into the driver's seat? Mr.

Skeptic might suggest that this is not a celebration and an embrace of design as we know it, but rather a move of forces directly from graduate business schools into the design space. What would you tell such a skeptic?

Fred Collopy: We are not so interested in design as we are interested in design thinking. The analogy with heart surgery could hardly be less apt. Heart surgery is about the development of a very specific set of skills. The analogous case here might be with a draftsman. No, we do not intend to ask managers and others who design our world (whether they use that language or not) to compete with either heart surgeons or draftsmen for jobs. We do ask that they develop a much-neglected mode of thinking: that they complement decision thinking and research thinking with design thinking. None of this is new to business thinking. It is all in Simon's *The Sciences of the Artificial and Administrative Behavior*. We are simply asking our colleagues to return to those seminal works and revisit that earlier commitment to this mode of thinking and expand upon that.

I disagree with your observation about Frank Gehry's awareness of the marketplace for design. He and a partner, Jim Glymph, worry a good deal about just that issue. Indeed it might be said that Jim's whole job is to worry about that. And I think that many of the book's contributors actually addressed the very issue you say is ignored in the book, the changing marketplace for design. How can Lucy Suchman's (for years an employee at Xerox) piece not be understood as challenging the very image of "celebrity designers" that you dismiss above? How are Joe Paradiso's comments on design labs and Karl Weick's description of the birth of Visa to be interpreted if not in terms of this "marketplace" you refer to?

Now don't take this the wrong way, but your tone reminds me of computer programmers who in 1976 dismissed the Apple II and TRS-80 as "computer-like devices." These machines were not real computers, they reasoned. When pressed about what makes a computer a real computer, it became clear that is it the exclusive province of a "priesthood" of professionals. Well, today kids all over the world are programming computers, with or without the permission of the real programmers. And they are also designing the world they inhabit, with or without degrees in design.

Richard Boland: You are absolutely right, GK, in saying that there is an important transformation that is taking place toward a higher value in both business and design education. But we are not just interested in product or strategy design. Managers design all day everyday, but tend to do so, as you correctly point out, in a decision-focused, convergent, highly constrained way. Our interest is not in making managers more divergent or creative, but in making them realize they are designers and that the systems of communication, planning, operations, reward (in short, organizing) that they design have consequences that require the responsible, self-reflective exercise of design thinking.

To bring this discussion into the "real world space." as you say, let's consider the horrific tragedy in the Gulf Coast states right now. What do we see? We see the immense incompetence of management—a system of emergency preparedness and response that seems impossible. How could such a thing have happened? As one New Orleans area official put it, "We ask for beds, food and water, and FEMA asks us to meet and develop an organization chart." Ted Koppel is shown telling the senator from Louisiana that the federal government didn't send help earlier because the state did not ask for it through correct channels. As if having the right hierarchy and forms to fill out are what management is all about. It's disgusting what passes for management in our world.

What is missing in all this is a design attitude behind the running of FEMA, the state emergency planning group, the National Guard and so on. What is missing is a history of making design critiques, of asking "what if?" questions, of assuming that the system they are imbedded in could always be made better, and an awareness that their highest responsibility is to improve its design. Any idiot can decide to merge two companies or to sell a factory and move production to China. Only a designer can create a merger worth doing, or find a way to make America stronger in productive capacity rather than run away. That's what we want our students to be able to do, and it requires that they see themselves as designers and exercise design thinking in everything they do.

GK VanPatter: If design mastery and business mastery converge into one set of skills what does that look like in the marketplace from your perspective? Where do the future leaders of cross-disciplinary design and innovation come

from? The floor is all yours for final comments.

Richard Boland: If business schools can transform themselves into more responsible, action-oriented, trans-disciplinary, and design-inspired institutions with a studio-based, world-engaged focus, and can recruit students who have a broader vision of themselves as playing a leading role in making the world a better place, and can include faculty from the design fields, then they have a chance of being that place. Or if design schools could achieve the same type of transformation, they could be the source of that energy.

But I doubt that it will happen. Institutions like universities persist so long because they are so good at resisting change.

My gut feeling is that business schools are losing their relevancy, and perhaps more importantly, losing their societal perception as being relevant so quickly that they may become extinct in the next decade or two. It took a little over century for business schools to ascend to the privileged status they held up until a few years ago, but it will take nowhere near as long for them to become marginalized, unless a major change takes place. Earlier you mentioned the Appreciative Inquiry movement being nurtured by our colleague, David Cooperider, and his many associates. I see that as one model for a source of transformational leaders, and the AI approach is firmly grounded in design thinking and positive aspirations. My best bet is that new types of university (and non-university) programs will emerge that capture the imagination of young people who are tired of the values embodied in management education and want to do something more significant with their life than we are offering in today's educational programs.

Fred Collopy: When my son Peter was quite young, he noticed that computers were malleable, that he could readily transform how they worked. And he began to do just that. He and his peers have been designing things (mostly computer programs) since they were children. It is part of their identities. They will not all enter the design professions, but each will apply their design sensibilities and skills in whatever professions they do enter. So, I am optimistic that this will happen with us or without us.

Epilogue

GK VanPatter: In the spirit of attempting to work together, we would like to invite you to join in an experiment that ties into the profile tool that we referenced earlier. For the purposes of bringing more understanding to our readers on this subject, we would like to profile one of your graduate business schools classes along with a class enrolled in a graduate design school. UnderstandingLab will make for us a small map of the results. This might help to clarify the notion that different tools are needed depending on what innovation issues are being faced in the real world marketplace. It is likely that this might lead to further conversation between us.

Richard Boland: In principle, that sounds great. In the *Managing as Designing* book, the Kolb et al chapter presents some findings showing differences of cognitive and learning styles among design students specializing in different design sub-disciplines. So we are interested in that topic. But the university research world has gotten very complicated lately, and an Institutional Review Board has to approve any research with human subjects. It is fairly straightforward, but requires a proper research proposal, theoretic model, hypotheses, approved protocol, data management procedures to assure privacy, security and anonymity, true informed consent, etc., all of which take some effort to prepare. If you have a model and analysis methods written up, we can certainly try to put a proposal together.

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Practice Management Digest

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Reclaiming the Day: Timesaver Tactics for Architects

By Charles Nelson, AIA, FRAIA

This article summarizes a workshop, Reclaiming the Day: Timesaver Tactics for Architects, at the AIA Knowledge Community Fall Conference & New York Chapter Conference, October 27–29, 2005, at the Center for Architecture in New York. The conference theme, Getting to Great, used the best-selling book, *Good to Great*, by Jim Collins as the starting point for a rich collection of practice management discussions.

Collins' Five-Level Hierarchy

Level 5

Executive--Builds enduring greatness through a paradoxical blend of personal humility and professional will.

Level 4

Effective Leader--Catalyzes commitment to and vigorous pursuit of a clear and compelling vision, stimulating higher performance standards.

Level 3

Competent Manager--Organizes people and resources toward the effective and efficient pursuit of pre-determined objectives.

Level 2

Contributing Team Member--Contributes individual capabilities to the achievement of group objectives and works effectively with others in a group setting.

Level 1

Highly Capable Individual--Makes productive contributions through talent, knowledge, skills, and good work habits.

As Collins notes in his book, Level 5 people are very rare. The majority of architects and other design professionals I have worked with are somewhere between Level 2.5 and Level 3.5, based on the above descriptions. Whatever level a person is at, both that person, and his or her employer, have a powerful common goal in him or her achieving the next higher level. Helping practices—and the people in them—to improve their effectiveness is a goal I share with members of the AIA Practice Management Knowledge Community Advisory Group.

This workshop focused on ways that architects can use time more effectively, with the obvious goal of having more time for things that really matter in a design office. As the facilitator for this workshop, I first presented a small group of slides from PSMJ Resources' two-day Project Management Bootcamp® program on time management and communication, as a way of focusing the workshop on these issues. The remainder of the workshop consisted of the following exercises, and produced the results indicated.

Brainstorming Time-Wasters

Six groups of four each worked together to identify the main time-wasting activities in their practices, and then selected the top three of these by consensus. This produced a total of 20 top time-wasters (two groups had four top items). Then attendees voted, by a show of hands as to which of the Top 20 were the source of the greatest waste of time. The results (ranked in order of votes) were:

- 23 Open office distractions
- 20 Office organization
- 16 E-mail
- 15 Clutter
- 15 Loss of focus

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- 13 Staff interruptions generally
- 9 Miscommunication
- 7 Bad clients
- 7 Conference calls/poor agendas
- 6 "Can't say no!"—agreeing to do non-productive work
- 6 Constant client interruptions (high- maintenance clients)
- 6 Nobody to delegate work to
- 4 Dealing with low-quality prospective clients
- 3 Resourcing for projects
- 3 High turnover and resulting training
- 2 Time organizing meetings
- 2 Micro-managing by senior/retired partners
- 2 Personality clashes
- 2 People not paying attention to progress reports
- 1 Micro-management by clients

Seeking Solutions

The top six items then became our focus for the rest of the workshop. Each of the six groups selected one of the top six, and workshopped solutions to the problems. At the end of this exercise, each group selected from their list what they considered to be the three best remedies, as follows:

Open office distractions

- Turn off cell phone ringers
- Establish quiet zones
- Establish quiet times
- Office organization
- Set up standards and follow them
- Consistent, ongoing filing and periodic disposal
- Inform new staff (and everybody else) of organizational rules

E-mail

- OHIO principle (only handle it once)
- Read and answer e-mail at a specific time or times each day
- Set up a method of filtering e-mail clutter
- Written policy on what to save and what to throw
- Convert samples and product literature to CD format
- Don't print everything (set guidelines)

Loss of focus

- Establish a system of bookmarking (using Post-it notes)
- Firm-wide schedules & systems
- Effective delegation of resources
- Staff interruptions generally
- Use more e-mail communication; fewer face-to-face meetings
- Group questions (not being available all the time)
- Better scheduling—allocate time more effectively

In general, I agree with these proposed solutions with the exception of the first bullet point under Staff interruptions. Many firms report that internal e-mailing can quickly get out of hand, and a number of firms have banned it for that reason.

Charles Nelson, past chair of the AIA Practice Management Knowledge Community Advisory Group, has established the Melbourne office of PSMJ Resources and is PSMJ Resources' project management trainer in the Asia-Pacific region. Information about PSMJ's project management Bootcamps can be found on www.psmj.com.



Practice Management Digest

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Leadership Skills for Today

By Tom Larsen, AIA

Architects are losing the battle of who will lead the building team. Owners, facility managers, and developers are all looking to others, such as program and construction managers to fill the leadership gap. As one owner put it, "We think the architect is getting in the way of a successful project."

Traditionally, architects define leadership using an internal professional definition, "Is this architect a great designer?" However, to lead in today's environment, architects need to develop external leadership skills—leading from a client's perspective.

Supporting this "walk in your client's shoes" approach, architects need to develop and practice seven behaviors and skills to effectively lead their organization:

- 1. Develop great leaders around you**—The days of the sole practitioner are over; surround yourself with partners who are smarter than you.
- 2. Create measures to ensure you are achieving everyone's goals**—The old business adage, "what gets measured, gets done," is truer than ever. Architects need to develop clear end goals for themselves and their clients and measure against these standards.
- 3. Communicate with all, constantly**—Great leaders communicate constantly, particularly in bad and uncertain times.
- 4. Model behavior you want out of others**—Leaders inspire by demonstrating how they achieve the extraordinary. Unfortunately, when their behavior does not match their stated objectives, they immediately destroy any hope of achieving their goals.
- 5. Demonstrate passion for results**—Like modeling behavior, if you don't demonstrate passion, how can you expect others to?
- 6. Interact with integrity**—Without trust, architects have no hope of leading their clients. Be prepared to deal with issues that come up on every project with integrity and with clients' best interests and goals at the center of every discussion.
- 7. Take risks, and encourage others to do so**—Overcoming adversity is the definition of leadership. Giving your staff opportunities to succeed, rather than fail, builds a resilient organization and builds leadership depth.

By focusing on developing your and others' leadership skills along these seven measures, architects can improve their client service and re-establish themselves as the leader on building projects.

Tom Larsen, AIA, is a managing director with Larsen Associates, a management consulting firm dedicated to serving the business needs of architects and designers.

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Image Advantage: Creating a Powerful Firm Identity

By Nancy Egan and Cathy Edgerly

Quick, before you begin to read the following article take a few minutes and describe your firm in no more than 55 words.

As competition for projects grows, more architectural firms are taking their cues from consumer marketing, where branding continues as the catch-word of the moment. Propelled by the search for an easy answer, the results are not always distinctive, memorable identities that are the mark of greatness. Firms are too often content with a gloss—pretty pictures and platitudes—rather than a rigorous evaluation and promotion of their authentic identities. As a result, the profession has seen an epidemic of new looks and logos that lack the kind of differentiation that creates understanding, loyalty, and at best, “aura” in the marketplace.

Addressing the issue of identity demands far more than innovative graphics, a hot Web site, or a name change. Successful branding initiatives begin with the most basic, and perhaps the most challenging, question, “Who are you?” An honest, thoughtful response requires a focused, sometimes uncomfortable, examination of the true purpose and values of the firm.

Authenticity

Expressing the authentic identity of an organization, through an integrated program that encompasses aspects of firm culture from behavior to graphics, creates far more than a brand—it is the source of true competitive advantage. The good news is that every organization can develop a distinct and powerful image advantage. The bad news: too many firms default to copycat imagery and language.

The lack of differentiation not only confuses clients, it makes them wonder what is real. Lack of authenticity is hardly benign; it is, in fact, fake. Although we are culturally ready to accept the artificial in everything from hair color, lips, and noses to themed environments, no client wants a less-than-forthright relationship with his or her architect. No single firm can be all things to all clients—market needs are widely diverse and, happily, so are the passions and talents of architectural practices.

Where do you begin the search? Right in the studio there are artifacts that, no doubt, reveal the heritage, culture, and beliefs of the firm. Look around. Who are your heroes and muses, what images are posted in the workstations, what sources are referenced again and again? What do they say about the values of the individuals who make up your organization? Unspoken evidence speaks loudly.

Next, spend time with your people. Who works there, what matters most to them, why did they choose the firm, and why do they stay? And what about your best collaborators? Or your best clients? Extended teams are like tribes—they have shared values, they understand and respect one another, and they enjoy working together. Who is part of your tribe and why?

Human beings are hardwired for narrative. What are the stories that are told and retold around the coffee bar or in every presentation? How does the team talk about projects and people, about their achievements or failures? Listen closely. This is the real language of your firm. In some places it sounds like a graduate design studio or a critical journal, in others the talk is of clients and how to make them happy. Listen not just for the plot but also for the language itself, the nouns and verbs. You might be surprised at how original and descriptive your own language is.

Think back to the defining moments in the life of your organization. It might be how you started the business, made a strategic hire, or a managed a significant win or loss. How and why did you and your partners react when

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there was a critical decision to be made? What was at stake? What informed your actions? How did those challenges and choices define your identity today?

Self-Fashioning

Now pull out that 55-word description, along with a copy of your latest proposal and your mission statement. Do these documents capture the unique culture of your organization as you have been observing it? Or, if your name is not on the letterhead, could they belong to any of your competitors? If you are in doubt, visit a dozen different architectural Web sites or the architecture section of your favorite bookstore for some comparative analysis—include the usual suspects for your market but also some of the recognized leaders in specific areas.

Market leadership is linked to an ability to articulate distinctive values, be they aesthetics, technological superiority, or cultural concerns. Leaders know their strengths and play to them in their work, in their materials, and in dozens of revealing details. What about you? You have the power to project an authentic identity at multiple levels in strategic statements about your mission, vision, and philosophy, through the culture of the organization and the behaviors of your team and, of course, in the verbal and visual expressions that we think of as brand images.

If an internal audit reveals a gap between your true identity, the deeply held beliefs and aspirations of the firm, and the branded deliverables and actions that form your image in the marketplace, it is time to self-fashion. Developing a distinct image that resonates with the values and vision of your organization is also a step towards sustainability. A clear and memorable identity attracts like minds, as colleagues and as clients, and will allow your firm to evolve as markets change.

When he was selected as one of Time magazine's most influential people of 2004, Frank Gehry called for authenticity —“The message I hope to have sent is just the example of being yourself. I tell this to my students; it's not about copying me or my logic systems. It's about allowing yourself to be yourself.”

Components of Identity

Strategic Identity

Vision
Mission
Philosophy
Position

Behavioral Identity

Culture
Values
Beliefs

Verbal/Visual Identity

Name(s)
Lexicon
Symbol/Logotype
Visual Systems
Standards

Definitions

Identity—The expression of the aspirations, values, and purpose of the firm. The discovery, fashioning, affirmation, and nurturance of an authentic firm identity are critical to a satisfying, successful, and sustainable practice.

Image—The coherent and consistent representation of identity such that it reveals the true and differentiating qualities of the firm. The development of a compelling narrative about the vision, history, and culture of the organization is a powerful communication tool for both internal and external audiences.

Position—The place that the firm holds in the perception of its audiences. Positioning defines the organization in terms of value creation. If the firm does not determine and control the positioning message, the marketplace will do so.

Branding—The systematic and consistent use of the firm identity (the brand) in all communications with the audience. The branding structure is used to optimize and illustrate how the verbal and visual elements relate to one

another to maximize both audience and stakeholder perceptions of value.

Nancy Egan heads her own consulting firm, New Voodoo, that provides image and content development to the design community internationally from offices in Santa Monica, Calif., and Cambridge, Mass.

Cathy Edgerly has a national practice focused on marketing, planning, and business development in industries related to the built environment. Her office is located in Cambridge, Mass.





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Why the Future Won't Need Today's Design Firms

Future Won't Need Today's Design Firms

What's next for successful architecture, and design practices? We will explore this question more deeply in the upcoming months in *DesignIntelligence*. We believe that firms will not only be faster and smarter but also wiser and more independent. This much is known: the best firms always move forward. Fundamentally, that is why future clients won't need today's design firms.

We expect to see significant new processes that will breakaway from the linear project management processes most firms utilize today. Contract documents will be overhauled to reflect simultaneous multi-phasing and non-linear productivity. Powerful parametric technology will deploy artificial intelligence using voice command. We expect 3-D and 4-D BIM and smart CAD. Firms will integrate virtually in models, not vertically in service silos.

Changing demographics will alter the marketplace significantly, requiring foresight and an eye to the future. The client's world will be changing even more radically than in the past. Some firms will be changing at a speed calibrated to those client's changes. Others will wonder where the clients have gone.

- Focus on what you want to happen
- If your plan for the future is not well designed, it will deteriorate
- Find a way to always move forward

Foresight and innovation will be first on the agenda of the most successful firms. Architects and designers will get serious about the business of running professional practices. They will understand that design firms are run for their clients, not for the firm's employees. Their new agenda will be to create new scientific order from complexity. Increasing complexity will create new relevancy and new satisfying fee parameters. Higher performance is made possible by technical and human creativity and both will be systematized.

State and national governments will enact new laws to improve health, safety, and welfare and to vastly improved social well-being. The National Council of Architectural Registration Boards (NCARB) and other design licensing authorities will take on new relevancy as the power of place comes to be better understood. Experiencing well-designed spaces will be attributed to better learning and increasing brain functionality. Architectural spaces will be credited with healing and emotional rejuvenation. Architecture, engineering, interior design, landscape architecture, and industrial design will shape social experiences and become forces for the betterment of the human experience. Design firms will be creating a blueprint for survival one project at a time.

Does this all sound a bit too strong for your own scenario tastes? Do you know what's coming next? Are you the voice of opportunity in your firm? Do you know how to break through the cynicism and worn-out excuses? Are you a source of strategic optimism? Are you putting in place alternatives to the status quo?

We believe that much that will happen in the future is knowable and that we can even plan for inevitable surprises. How likely is it that your own new vision will become a new reality? Time will tell. But this much is certain, the future won't need today's design firms.

Design Intelligence is published by The Greenway Group.

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Letter From the Editor

By Amy Yurko, AIA

Welcome and thank you for reading the *PMKC Digest*.

The AIA Practice Management Knowledge Community Advisory Group (PMKC AG) understands that every firm, regardless of size, project type, or extent of service offering must be well managed to be successful. Our programs and content offerings are designed to provide insights into successful practices of all types. As expressed in our recent strategic planning session, our vision is to have each of our members say: "I am delighted that easy and effective access to and sharing of, PM knowledge has improved me, my practice, and my profession."

The PMKC annual fall conference, Getting to Great was presented jointly by the AIA PMKC and the AIA New York chapter. Held in late October 2005, it was a breakthrough event, presenting powerful lessons in leadership development, marketing, and management skills to help firms set high goals and more importantly, to achieve them. Speakers included leaders from some of our country's most successful firms who have committed themselves to building great organizations that will last beyond their tenure, and that will thrive in a changing world. Sharing their knowledge of team leadership, mentoring, business development, and management, they led seminars, facilitated workshops, and participated in roundtable discussions to help define a new model for leadership and a fresh approach for firms that are on the road to greatness.

Highlights included engaging pre-conference workshops, informative breakout sessions, and off-site tours and receptions. The conference sessions were held at the fabulous Center for Architecture in New York City. Off-site activities included mobile workshop tours of 7 World Trade Center and the Solaire Building, as well as an elegant reception at the Skyscraper Museum. This issue of the Digest includes articles and resources in support of our fall conference theme.

Comments from Getting-to-Great attendees:

"This is without a doubt the best business conference I have ever been to. I particularly liked the panel discussions that were interactive and revealed what other professionals are doing. Thank you for putting together such a meaty and meaningful program."

"Useful information which can be implemented in real time with measurable results"

January brings annual changes to the PMKC AG roster. I will rotate off the advisory group while our newest appointed member, Michael Strogoff, begins his 5-year tenure. I am honored to have become a lifetime member of the esteemed group of individuals known as PMKC AG Past Chairs. Best wishes to the 2006 PMKC AG, including Andrea Cohen Gehring, AIA, Immediate Past Chair; Grant A. Simpson, FAIA, 2006 Chair; Jim Sawyer, AIA, Vice-Chair; and Sara McCann, AIA and Michael Strogoff, AIA, members. Keep in touch with the PMKC at www.aia.org/pm/ and with the AG through our talented and diligently patient project manager, Bruce Bland at bbland@aia.org.

Special acknowledgement goes to our 2005 Legacy Sponsor of the PMKC, Victor O. Schinnerer & Company Inc., for their generous support of our programs and events!

Cheers!
Amy Yurko, AIA

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Call for Volunteers

The Practice Management Knowledge Community (PMKC) is looking for volunteers to serve on a best practices subcommittee. The best practices subcommittee will work closely with the PMKC Advisory Group to develop proposals for how the PMKC can support member needs for practice management best practices tools, identify practice management best practices topics, recommend best practices resources, develop guidelines for best practices submittals, screen best practices submittals, and recommend how best to share best practices information with the architectural community.

Each subcommittee member should be knowledgeable about several of PMKC's areas of interest: business practices and trends, delivery methods, financial management, human resources management, innovation management, integrated practice, intern development, leadership development and leadership transition, marketing and business development, operations management, project management, quality management, risk management, social responsibility management, strategic alliances, and strategic planning.

If you are interested in serving on this subcommittee, please submit your name and a brief history of your experience and knowledge areas to [Bruce Bland](#).

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News, Links, and Resources

Architects: US Department of Labor

Have you ever wondered how the profession of architecture is defined by the federal government? Check it out at the [Bureau of Labor Statistics](#), U.S. Department of Labor, *Occupational Outlook Handbook, 2006-2007 Edition, Architects, Except Landscape and Naval* (Web site last updated in December 2005).

What are AIA Best Practices?

AIA Best Practices represent the collective wisdom of AIA members. They are a compendium of the practical knowledge acquired by AIA members in the real world of architecture practice—knowledge gained from experience, immediately applicable to a task at hand. Browse [AIA Best Practices](#). Share your knowledge with other AIA members! Submit an AIA best practice! Find out more.

Six New AIA Contract Documents

The AIA Contract Documents program provides proven, consistent, and effective standard form contracts to the building design and construction industry. The program directs its efforts toward improving existing documents and developing new ones. In late 2005, the AIA introduced six new contract documents. These included [two new agreements and four new scopes of service documents](#) for use with owner-architect agreements.

Special Concerns for Small Businesses

The [U.S. Small Business Administration](#) (SBA) offers many special programs and supports many special interests in addition to supporting small business needs. Within its mission to assist the development and growth of small businesses, the SBA has a vast menu of focused initiatives for women, minorities, veterans, Native Americans and young entrepreneurs.

The PMKC 2005 Legacy Sponsor

Special acknowledgement goes to our 2005 Legacy Sponsor of the Practice Management Knowledge Community, Victor O. Schinnerer & Company Inc., for its generous support of our programs and events. [Victor O. Schinnerer & Co.](#) has been in the insurance business for more than 65 years protecting organizations and their employees. Its architects and engineers program was the first of its kind, offering products in professional liability, property, casualty, or specialty lines.

Recommended Reading

(recommended by [Marjanne Pearson](#) of MPA in San Francisco)

1. *Hiring Smart!* by Pierre Mornell, PhD

It's a great book, with terrific content—appropriate for anyone involved in gathering and analyzing information, not just for hiring. Also beautifully designed (by Pentagram, published by Ten Speed Press), with an appendix that is worth the price of the book.

2. *Unstuck* by Keith Yamashita & Sandra Spataro

This is also a great book, and it has become one of our Bibles for working with firms that are experiencing growing pains.

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Handbook on Project Delivery and Update Now Available

In response to the overwhelming need for information about today's complex and innovative project delivery methods, the American Institute of Architects, California Council (AIACC) has developed a comprehensive guide for architects, their clients, and contractors, to assist in important building-related decision making. This resource provides members of the building team important information regarding project delivery. The AIACC recently released the new *Update* included in *The Handbook on Project Delivery*. This 87-page addition features 15 case studies providing architects and their clients tools to aid in the evaluation of the different methods of project delivery.

Since 1996, the *Handbook on Project Delivery* has provided a thorough description of eight different delivery methods and a basis of comparison for the evaluation of the specific strengths and weaknesses of each method. A guide for architects, clients, and contractors, this comprehensive manual has sold more than 7,000 copies since its introduction.

The AIACC now introduces a companion publication, *Update: Handbook on Project Delivery*, a supplement to the original *Handbook* featuring additional case studies and delivery trends. This new resource is a guide for selecting the most appropriate delivery method. Architects and clients will benefit from this *Update*; it will help them make the best decisions for their next project.

For more information, visit [AIACC](#).

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