

Having trouble viewing this newsletter or on a mobile device, view the [online version](#).



# Practice Management Digest

News & Best Practices from the PM Knowledge Community

## Features

### Letter from the Editor

*By Donald Simpson, AIA, LEED® AP*

**“Advancing the Practice of Architecture”** This issue of the Practice Management Digest introduces the new Strategic Plan for the AIA Practice Management Knowledge Community. Our mission is to discover, generate, organize, and share insights, resources, and tools that enable architects to practice more effectively. Our Vision is to serve as the essential resource for advancing the practice of architecture. This issue includes updates on progress for a number of strategic initiatives: ...[Continue Reading](#)

### Practice Management Knowledge Community Strategic Plan

**“Advancing the Practice of Architecture”**

*By PMKC Advisory Group*

The members of the PMKC Advisory Group developed a strategic plan for our Knowledge Community to provide clear direction for our efforts. Our Mission is to discover, generate, organize, and share insights, resources, and tools that enable architects to practice more effectively. We have attached a copy of the plan and look forward to working with you in Advancing the practice of Architecture. ...[Read Strategic Plan](#)

### AIA Practice Management Knowledge Community Conference at The 2010 AIA Minnesota Annual Convention and Product Exposition

*By PMKC Advisory Group*

AIA's Practice Management Knowledge Community (PMKC) is proud to be collaborating with AIA Minnesota to bring you a diverse and inspiring program that will give architects new insights, practical knowledge and useful practice tools. As part of PMKC's mission — to discover, generate, organize, and share insights, resources, and tools that enable architecture firms to practice more effectively — we have attracted some of the nation's best speakers to present a series of seminars on marketing, strategic planning, collaboration, leadership, and IDP. And be sure not to miss our Practice Management Roundtable, hosted by the 2010 PMKC Advisory Group, for an exciting exchange of practice insights. For a listing and schedule of the programs ...[Continue Reading](#)

### Practice Management 102: Balancing Design, Client Satisfaction, Profitability, and Risk Management

*By Ray Kogan, AIA, Cliff Moser, MSQA, AIA, LEED® AP, and Michael Strogoff, FAIA*

At the 2010 AIA National Convention in Miami, three members of the AIA's Practice Management Knowledge Community Advisory Group conducted a half-day workshop entitled Practice Management 102. The workshop was intended to provide practitioners with a focus on balancing marketing, client leadership, profitability, and risk management through a beyond-the-basics overview of best practices in core areas of firm management: strategic planning, firm management, business development, client management, quality control, financial management, and leadership development. ...[Continue Reading](#)

### What Do I Keep? Guidelines for Implementing or Updating Your Document Retention Policy

*By Josh Flowers, AIA, Esq.*

Most design professionals struggle from time to time with issues related to document retention. In the effort to complete a project on time and within

## Fall Issue 2010

### Archive

- > [Spring 2010](#)
- > [Winter 2010](#)
- > [Fall 2009](#)
- > [Summer 2009](#)
- > [Recession Issue](#)
- > [Spring 2009](#)
- > [Fall 2008](#)
- > [Summer 2008](#)
- > [Spring 2008](#)
- > [Fall 2007](#)
- > [Summer 2007](#)
- > [Spring 2007](#)
- > [Winter 2006](#)
- > [Fall 2006](#)
- > [Summer 2006](#)
- > [Winter 2005/2006](#)
- > [Summer 2005](#)
- > [Spring 2005](#)
- > [Winter 2004](#)
- > [Fall 2004](#)
- > [Summer 2004](#)
- > [Spring 2004](#)
- > [Winter 2004](#)
- > [October 2003](#)
- > [August 2003](#)

budget, it can be challenging to find time to file important project records so they are readily available once the project is completed. Even if project files are in order, it can be difficult to determine what files to keep and how long to keep them. A helpful guideline may be to determine which documents should be kept permanently, which should be kept for a designated retention period, and which can be discarded. ...[Continue Reading](#)

### **Complying with State Licensing Requirements for Architecture Firms**

*By Rick Randel*

Most people understand that an architect must be licensed in every state where he or she practices. Many people do not realize, however, that an architecture firm must also be licensed in every state where the firm practices. And when I say "practices", I mean even submitting a proposal for a project in that state. If you are not in compliance with the firm licensing requirements at all times during the life of a project, it can be impossible for you to recover payment from your client. ...[Continue Reading](#)

### **Getting Paid By Getting Tough**

*By Joseph H. Kasimer*

In this difficult economy, there is no shortage of excuses for nonpayment of architectural or engineering services. After all, the economy is stagnant, financing for developers has dried up, projects are being shelved, and cash flow is poor. It is little wonder that collection of receivables for design professionals, particularly in the private market, has become a major challenge. ...[Continue Reading](#)

### **Integrating Project Management and Design Leadership**

*By Douglas R. Parker, AIA*

As architects, we are drawn to our profession with the lure of being part of a creative process and the opportunity to design great projects. We spend significant time and energy developing rigorous design processes to ensure unique and thoughtful projects. The management of these projects, however, is a secondary thought at best, often a necessary evil of doing work. As a result, many clients do not believe that working with architects is a positive experience, nor are they particularly satisfied with the delivery process, regardless of the outcome. ...[Continue Reading](#)

### **Social Media's Most Wanted: Experienced Architects**

*By Joy Davis, CSI, CDT*

Understand this about social media: it is insatiably hungry for information. This is great news if you're a little gray around the ears, because you have the richest, juiciest information of all – the stuff that come from real experience. Your favorite war stories from job sites, scenes you witnessed in meetings with owners, questions you've answered for interns – all of it can help you build a reputation for you and your firm online. Think of social media platforms like [Twitter](#) and [LinkedIn](#) as tools that help you build that reputation by making it easy for you to share what you know. ...[Continue Reading](#)

## ***Upcoming Events***

---

### **2010 Webinar Series**

#### **Business Development: How to Succeed in the New Economy**

*By Richard Friedman*

Thursday, October 21, 2010 | 10:00 am Pacific / 1:00 pm Eastern

One of the biggest challenges architecture firms face is maximizing returns from business development (BD) initiatives. Given the challenging economic landscape and fierce competition, it's imperative that firms engage as many staff as possible in BD. But to successfully develop a BD culture, a number of misperceptions need to be debunked. There is no "one size fits all" BD mold – a fundamental concept that's the foundation to this interactive workshop...

[Save the Date. \(More information later\)](#)

#### **AIA Practice management Knowledge Community Conference at The 2010 AIA Minnesota Annual Convention and Product Exposition**

November 2-5, 2010

To register please visit the [AIA Minnesota website](#)

## ***Resources***

---

[AIA Practice Management Knowledge Community Web Page](#)

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

[AIA Practice Management Knowledge Community LinkedIn Group](#)

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

## ***Provide Feedback***

---

### **Practice Management Digest**

We are developing an Editorial Calendar for the Digest that focuses on our mission of enabling architects to practice more effectively. Please provide your input to the following short survey to help us focus on what is most important to you. ...[Take Survey](#)

---

[Site Map](#) | [Privacy](#) | [Contact Us](#)

©2009 The American Institute of Architects, All Rights Reserved.

This message was intended for: %%emailaddr%%  
The AIA strives to provide information that is most relevant to you.  
To update your contact information or add an AIA Knowledge Community,  
update your [AIA account](#).