The Fast Lane: Setting a standard

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How your client gets treated from one office or department to the next is very high on the list of criteria used to determine who gets the next project.

Architectural, engineering, and environmental services firms spend a lot of staff time on the development and implementation of a broad array of "standards."

These may include standard processes and procedures for performing specific activities, standard templates for both technical reports and marketing materials, standard formats for documentation of time and expenses, standard checklists to monitor and record progress on projects, and even standard procedures for responses to a broad range of human resources/employee management issues.

In most instances, these standards are designed to help new staff members learn for themselves how the firm likes things to be done— very few firm or department managers today have time for extended one-on-one instruction sessions. In addition, giving a new employee a manual is a very convenient way of making sure everyone is taught the same processes and procedures.

Once developed and implemented, and once learned by new staff members, these standards can also serve as guideposts to measure individual performance on specific project assignments.

But is this really enough?

Let me pose a hypothetical case: We have a 12-year old A/E design firm (XYZ Consultants) with almost 200 employees in four offices located in the Midwest. Almost half of the staff is located in the headquarters office. Much of the firm's work is in the private sector, and seven of its top 10 clients are entities whose businesses are regional to national in scope. All of these top clients work with numerous departments to utilize a wide range of the firm's technical services.

XYZ Consultants has now reached a point where many of these clients work with more than one of the firm's four offices. In addition, most services are available in all four offices, so the firm frequently shifts work among offices, depending on which department or office has available capacity. In order to make this shifting of work possible— and invisible to the client— the delivered product must be integrated such that it looks like it was produced by a single entity.

The firm needs to make sure that each piece of the final product looks the same (fonts, formats, layouts, writing style, naming conventions, line weights, symbols, abbreviations, labeling conventions, etc.), regardless of which department or office actually performs the task.

Toward this end, internal staff committees have developed a template for an engineering report, a standard manual for CAD operators (including a standard library of symbols), a library of standard specifications, and standard forms for a number of project management and administrative tasks.

Is this really enough?

Absolutely **NOT!**

In addition to standards for the firm's production processes and procedures, we need to have standards for client
interaction.

When a client using your architectural services also wants environmental services, will the environmental department meet client expectations as to how he will be treated?

When a client from your headquarters office visits another office, will that second office meet client expectations as to how he will be treated?

What happens when the client gets treated so differently in a second office that he thinks he's visiting some other firm?

How do these things reflect on your firm? What does it say about the strength and buy-in of your "integrated firm" philosophy?

If the client is truly important to your firm— and basically every client is important if you want to work with them again— they should be treated just as well by the department delivering its first services to them as they are by the department with whom they have done major projects for years.

Similarly, the client has a right to expect that the staff in your 25-person branch office will show him or her as high a regard as the staff in your headquarters office, where they generate $5 million in billings annually.

If the client doesn't feel the same level of comfort with every unit of your firm that works on his projects, he may only give you projects when you can demonstrate available capacity in the local office, for fear the work will be shifted to an office where he does not have equal confidence in the staff or the end product.

Among others, you may need to have standards regarding:

How quickly phone calls are returned

How often the client is visited

How often other “touches” are generated

How often technical folks attend meetings of groups where clients are members

The quality of the work *experience* is now as powerful a discriminator as the quality of the work *product* itself. Therefore, how your client gets treated from one office or department to the next, regardless of generated billings and/or revenues, is very high on the list of criteria used to determine who gets the next project.

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