

ager and design team to get to know their client. The astute project manager asks questions, listens to, and observes the client throughout this process and shares his or her understanding with the design team.

Document Project Goals

It is easy for a design team or a client to get caught up in a project in such a way that the original goals are forgotten, and when this happens there is usually a day of reckoning when everyone is reminded of the original goals. However, such a situation can be avoided if the project manager focuses the team by involving them in documenting project goals. The client's goals for the project should be clearly documented before the design team begins work. The project manager should initiate this documentation, based on his or her understanding of the client, and share it with the design team.

The team will find that it is very worthwhile to discuss how they feel they can achieve the client's goals through their work on the project. The discussion should include project approach, budgetary and schedule parameters, and design objectives. This exercise provides an opportunity for the team to begin to work together, and typically results in parallel sets of goals for the effort—those of the design team and the individual. It is positive for the team and individuals to see each new project as an opportunity for growth. The client can only benefit from this attitude.

Once the team has documented the project goals (those of the client, the design team, and the individuals on the team), the project manager can use them as a benchmark to be referred to throughout the course of work on the project. The project manager should ask the team to review the goals at key points during the work on the project—typically at the beginning or end of a major phase of work. Such benchmarking will help reorient the team.

Just because project goals are documented does not mean that they cannot change during the course of a project. There are many reasons a client's goals for a project can change. Once the project manager senses that the goals are changing, it is critical to discuss the change with the client; assess the impact on the project; address any scope, schedule, and contractual issues; document the change; and share it with the design team. They cannot be held accountable to deliver a project which meets client goals if they are not made aware of those goals.

Develop a Project Work Plan

The most critical phase of any project is planning the work. The work plan establishes the scope of work, including detailed lists of tasks, activities, and deliverables; the schedule for the work; and the professional service fees associated with accomplishing the work. The work plan is the basis for all contracts with the client and with consultants. It establishes the baseline for monitoring the progress of the work—the completion of tasks, activities, and deliverables within a specific time frame and expenditure of staff hours. If a work plan is developed, the likelihood of having a successful project increases dramatically. Without a plan the team may get lucky, but as the number of complex issues associated with design projects has increased, it has become increasingly risky to work without a clear plan.

The work plan is a road map for everyone on the team to follow. If the project manager monitors it throughout the course of work on the project, any deviations from the work plan will be known immediately. The project manager then has the opportunity to make the necessary adjustments to get the project back on track, or make modifications to the work plan. Such modifications may be as simple as a fine-tuning of the work plan, without contractual, schedule, or budgetary adjustments. If significant changes have occurred, it may be necessary to reexamine the project scope, schedule and fees, which may mean contractual modifications.

As important as it is to develop the work plan as a tool, it is equally important to strike the right balance between an underdeveloped and an overdeveloped work plan. If the work plan is not fully developed, it will fall short of being a useful tool against which progress on the project can be monitored. If it is overdeveloped, it will become so cumbersome that it will either be ignored, or the project manager will spend so much time managing the work plan itself that there will be no time to lead the project.

A work plan is typically initiated during the marketing effort associated with the project—responding to a Request for Proposal or presenting the design firm's approach to the project during a marketing interview or presentation. Once the firm has been selected for a project, the project manager should begin to develop a detailed work plan, with participation from key project team members and in communication with the client. This process provides the opportunity for understanding and buy-in by both parties.