

Contractors Can Secure More Work By Assuming the Role of a Design Consultant

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It makes little sense. On commercial and high-end residential projects, the contractor seldom provides input into product selection. But if your initial involvement with a project is at the time of bidding, what makes little sense becomes your project reality, as materials and processes are already dictated by the project specification.

Savvy contractors can gain greater project input and can secure more work for their companies by becoming involved with design professionals during the early stages of project design. By assuming a pro-active role as design consultant, a contractor gains greater insights to bid projects more knowingly and successfully, and can assert greater influence on installation outcomes.

Project Design Team

An underutilized opportunity for creating more jobs and visibility for your company exists within the design community. Architects, landscape architects and interior designers are key members of the project team for commercial and high-end residential installations. They design the project and are involved with product research and selection.

The initial step – long before the first shovel of dirt is turned on a project – is simply getting in front of an architect and positioning your company as a reliable resource for building material information. Doing a little homework before you contact a design firm is important. Most design firms maintain a website that contains information about the firm: area of expertise or types of projects they typically design; professionals on staff – architects, landscape architects, interior designers or engineers; and a portfolio of completed projects. Armed with this information, you can better decide where to spend your time, relative to the construction products and services your company provides.

Creating strategies for successful marketing to the design professional

Once you determine which design firms to contact, with whom you speak in the office, becomes important. Office staff sizes vary, but will typically include individuals performing the following functions:

- **Project Manager (PM)** – manages design budget, schedule, and staffing
- **Project Architect (PA)** – selects consultants, oversees project designers
- **Project Designer** – designs functional solutions for the owner’s needs
- **Staff positions or consultant (contractual) personnel:**
- **Interior Designer** – selects interior finishes, designs interior space
- **Landscape Architect** – selects paving materials, designs exterior space
- **Specifier** – initiates product research, develops construction documents, and writes project specifications

Project Stages

Assuming you are contacting a design firm about a particular project, each of the design professionals will require different types of information, depending upon the project stage. Project stages are chronological project development phases and indicate or direct specific design activities, ultimately leading to the project’s construction. Project stages are standard benchmarks of activity and are generally the same for all construction projects (and construction design firms). Understanding the activities and the individuals involved at each project stage will make your consultative sales call on the design firm more valued by the designer and more productive for you.

PROJECT STAGES¹

STAGE	ACTIVITIES	DOCUMENTATION
PROJECT CONCEPTION	Feasibility studies Establishing project goals Site selection Budgeting	Preliminary cost estimates Preliminary schedules
DESIGN	Schematic Design Design Development (DD)	Sketches Conceptual Plans Revised Cost projections Drawings: plans, elevations, sections, typical details Preliminary specifications Revised cost projections
CONSTRUCTION DOCUMENTATION (CD)	Final design	Detailed drawings Specifications Cost revisions
BIDDING	Contract negotiations	Addenda
CONSTRUCTION	Construction Project completion	Modifications

In general, you will be most influential when calling upon a design firm during the project Design stage, when the design team is undertaking Schematic Design and Design Development activities. Contacts made during Project Conception may be too early, and contacts made during Bidding or even Construction Documentation, may be too late. Depending on the size of the project, unforeseen problems, and the owner’s direction, the project stages could be many weeks to many months in duration, with numerous stops and starts in between. By understanding the significance of each of the project stages, you can time your visits when they will be most effective.

If your architectural project call coincides with the Project Conception stage, for example, determine when the Design stage will start, schedule a future call coinciding with that later Design stage, then move on to another design firm with more stage relevant work. By keeping track of projects and design firms in this manner, you can ensure focused and productive meetings with designers, while creating a significant pipeline of future projects.

Information for the Designer

In addition to timing your office visit or telephone call to a project’s stage, providing the most relevant information for the stage and design professional involved, is equally important. Design Development and Final Design generally require the most detailed information from you, and your suppliers or manufacturers. The following table briefly highlights the informational needs of the design team as a project progresses to bidding and construction.

DESIGN TEAM		
DESIGN PROFESSIONAL	PROJECT STAGE	RELEVANT INFORMATION
Project Manager	Schematic Design Design Development	General cost estimates, project references, general product information, scheduling impacts
Project Architect	Design Development Construction Documents	Refined costs, project references, specific product or manufacturer’s information, scheduling impacts
Project Designer	Design Development	Color charts, pattern selection guide, cast samples/color chips, installed costs
Specifier	Construction Documents	Product tech data, guide specifications, installation requirements

You will notice as a project’s development progresses, the informational requirements of the design team members become more differentiated and precise. For example, the Project Designer tends to need detailed aesthetic information, while the Specifier tends to require more detailed technical information. As you meet with the design team, ask questions and take notes. What is the budget (so you can offer multiple relevant options)? What is the design professional’s and project owner’s experience and expectations (so you can offer solutions and establish realistic expectations for aesthetics and maintenance)? Will the project be LEED® certified (so you can discuss the sustainable advantages of concrete and related installation technologies and materials)?

Product Discussions

As you evolve into a consultant’s role, knowing your product, as well as your competitors, is important. Your ability and willingness to discuss the qualities of your product compared to alternate or even competitive systems will be appreciated by the architect, since most project specifications require a minimum of three brand names, or contain “or equal” and other non-proprietary language.

It is important to note, when discussing your product versus competitive materials, to do so within the context of features and benefits, not by bad mouthing the competition. Negative selling should never be used to promote your talents or products. The more informed an architect is about product options, the more likely he or she will be to write a specification that is clear, correct, and complete. Sharing your knowledge and experience with project designers supports the creation of construction documents without ambiguity, which improves the project bidding and installation process. Sharing your expertise makes the architect look good, and elevates your stature in the eyes of the architect.

Architectural Marketing

Architectural consulting² is a long-term process. It is a form of marketing, with success dependent upon three elements: Timing (review Project Stage discussion above), receptive audiences (review Design Professional section of table 2), and relevant, stage-specific messages (review Information for the Designer section above). Implementing your architectural calls in accordance with these three marketing elements provides a framework for successfully bidding and securing more projects, and establishing your credentials as a reputable, and reliable, design consultant.

Savvy contractors gain greater project input and secure more work for their companies by becoming involved with design professionals during the early stages of project design. By assuming a pro-active role as an architectural consultant, you get greater insights to bid projects more knowingly and successfully, and can assert greater influence on project installation outcomes.

¹ For more information see, *The Project Resource Manual – CSI Manual of Practice*, The Construction Specification Institute.

² Howard Jancy, “Building Relationships with Architects”, *ConcreteNetwork.com*, January 2010, <http://www.concretedecor.net/All_Access/1001/business_strategies.cfm>.

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