

Communication and Design Professionals



Communication influences all aspects of your project cycle. This engaging eLearning course uses the latest web technologies that automatically adapt courses for the best optimal experience. Click on the white "Launch Course" button above to begin or select from menu below.

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 Scope & Change Management

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 Typical Early Warning Signs

 Lack of Procedures to Identify Conflicts, Omissions, and Errors

 Establish Procedures to Identify or Address Conflicts, Omissions, Errors

 Resolving Problems

SUMMARY

 The Problem & The Solution

ASSESSING WHAT YOU LEARNED

 Post Assessment

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 Course Complete

AIA CES Provider statement

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AIA
Continuing
Education
Provider

Course Objectives



00:23

Click play for audio

Understand how poor communication can hurt your business

Be familiar with common communication breakdowns and challenges

Know the basics of effective communication

Recognize project-specific communication problems and solutions

Know how to respond if there's a problem.

Introduction Exercise

A Communication Quiz

How would you interpret the phrase "Light House Keeper"? (click all square cards below that apply)

**Person who watches for
ships**



**Vacuuming and
dusting, but no
windows or
backboards**



baseboard

A pale house keeper

A skinny house keeper



**Someone who keeps a white
house**

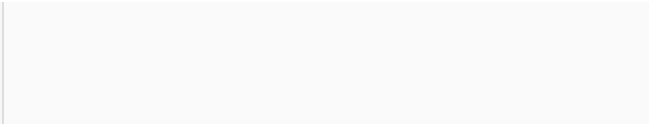


**Someone who
keeps a house that
does not weigh
much (trailer, etc.)**

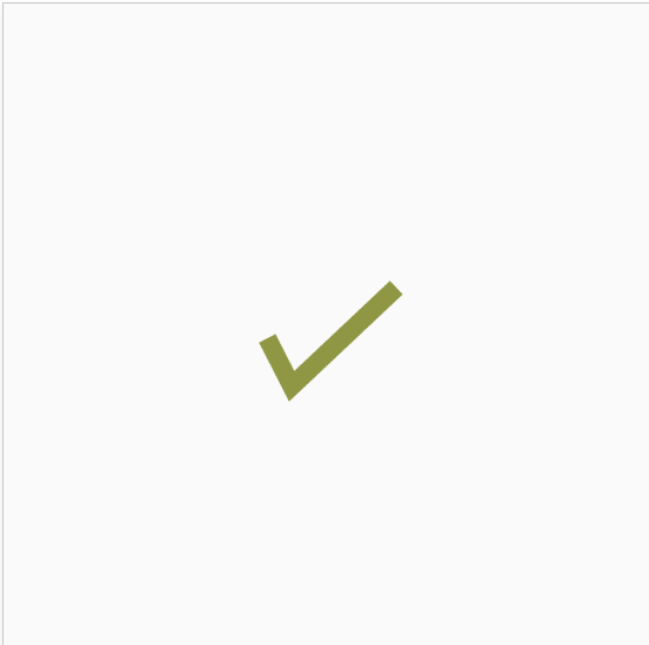


**A "light in the head" house
keeper**

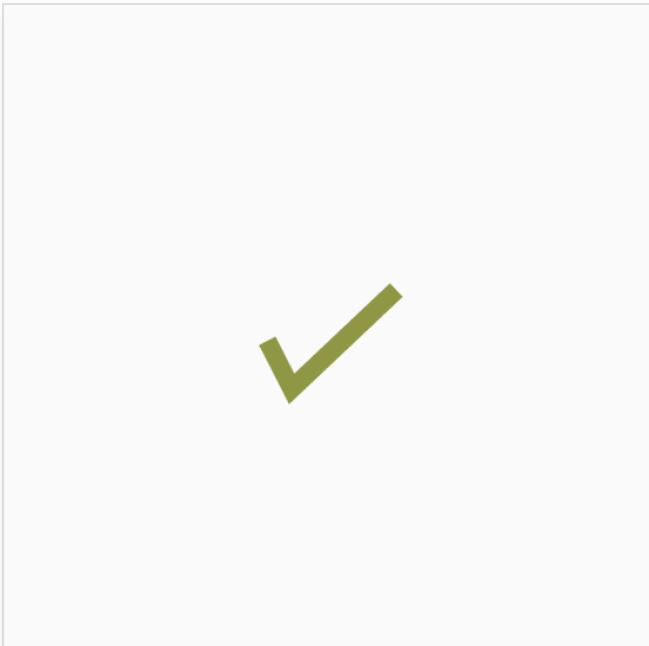




A collector of model light houses



One who keeps all the lights on in a house



Click play for audio

Review all communication (application to proposals, scoping documents, contracts) for possible “double meanings”

Learn to apply the “Light House Keeping” test.

LET'S CONTINUE TO LESSON 1

LESSON 1

Risk Drivers: Classification of Causes



00:35

Click play for audio



2

Technical



Error and/or omission of a technical nature

Results in:

Non-Technical



Breakdown in project management processes or business practices

Leads or contributes to:

Loss Prevention File or Claim

Click image to zoom

AXA XL's Risk Drivers Research

Technical causes are defined as related to those tasks you were trained to do as a design professional: calculate wind loads, specify materials, or apply building codes.

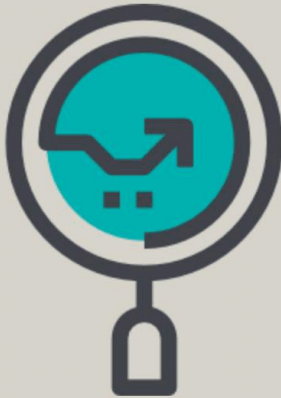
Non-technical causes are related to the business practices you follow in the operation of your firm, including project management.

Example:

A code violation may be the technical cause of a claim. What's the risk management lesson to be learned from knowing that? Risk Drivers takes a closer look at the claims environment through scrutiny of a firm's project and practice management processes—or lack thereof. In this case, we might find that lax QA/QC procedures gave rise to the case violation. Or perhaps the error was made by an inexperienced employee working the project without adequate supervision.



Proprietary
Research



CLAIMS

have non-technical
factors that
contribute to
technical errors

Click image to zoom



00:26

Click play for audio



Project Constraints



Risk
Quality
Resources



Click image to zoom

Risk Drivers Constrain your Project

All three project constraints impact scope, schedule and budget.

Risk - the chance for loss.

Quality - the degree to which your project fulfills its requirements.

Resources - disciplines or individuals, along with equipment, supplies, materials or funding.

Top Non-technical Risk Drivers



Top 6 Non-technical Risk Drivers

1. Client Selection
2. Construction Phase Services
3. Project Team Capabilities
4. Communication

5. Negotiations & Contracts

6. Quality Management



00:24

Click play for audio

Communications - Risk Driver 2.0

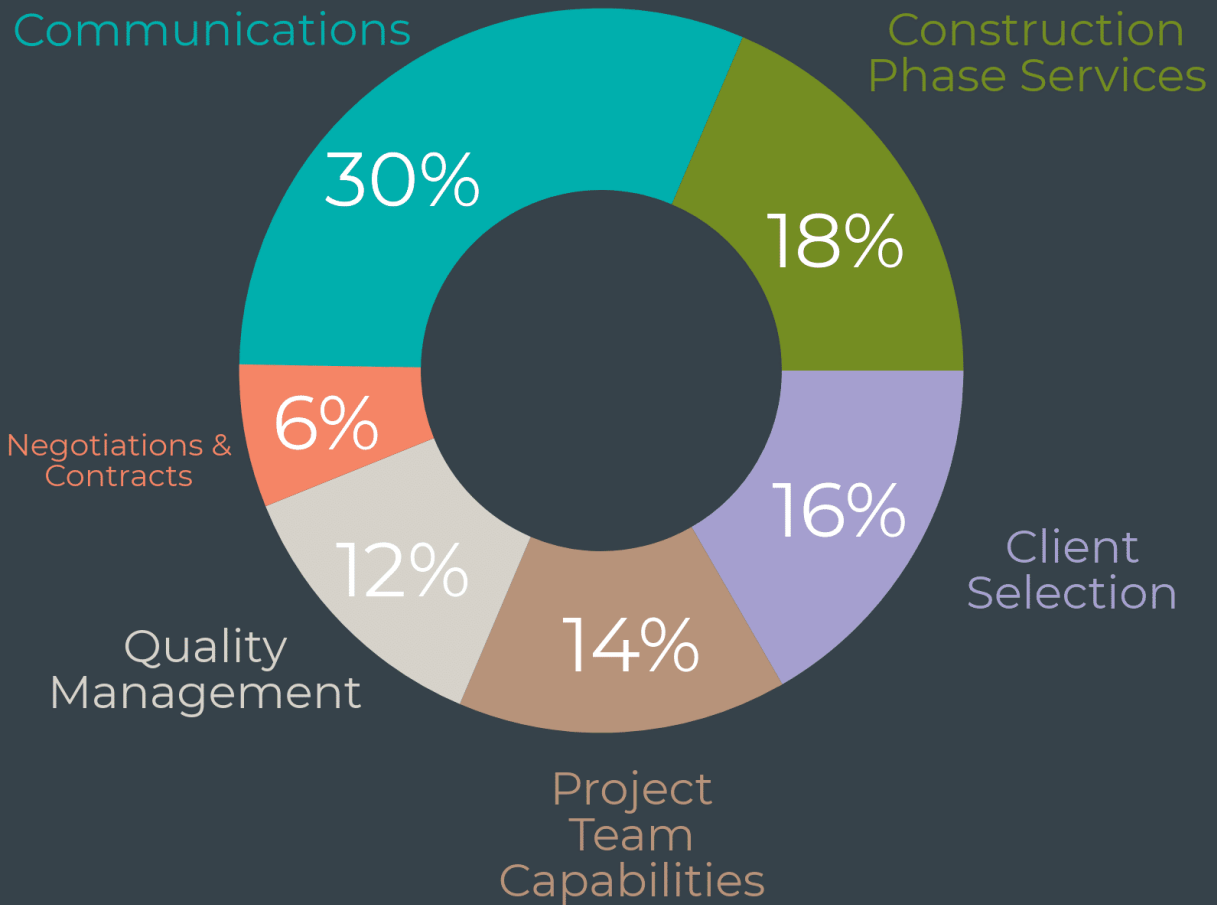


00:48

Click play for audio



Risk Drivers 2.0 by claims count



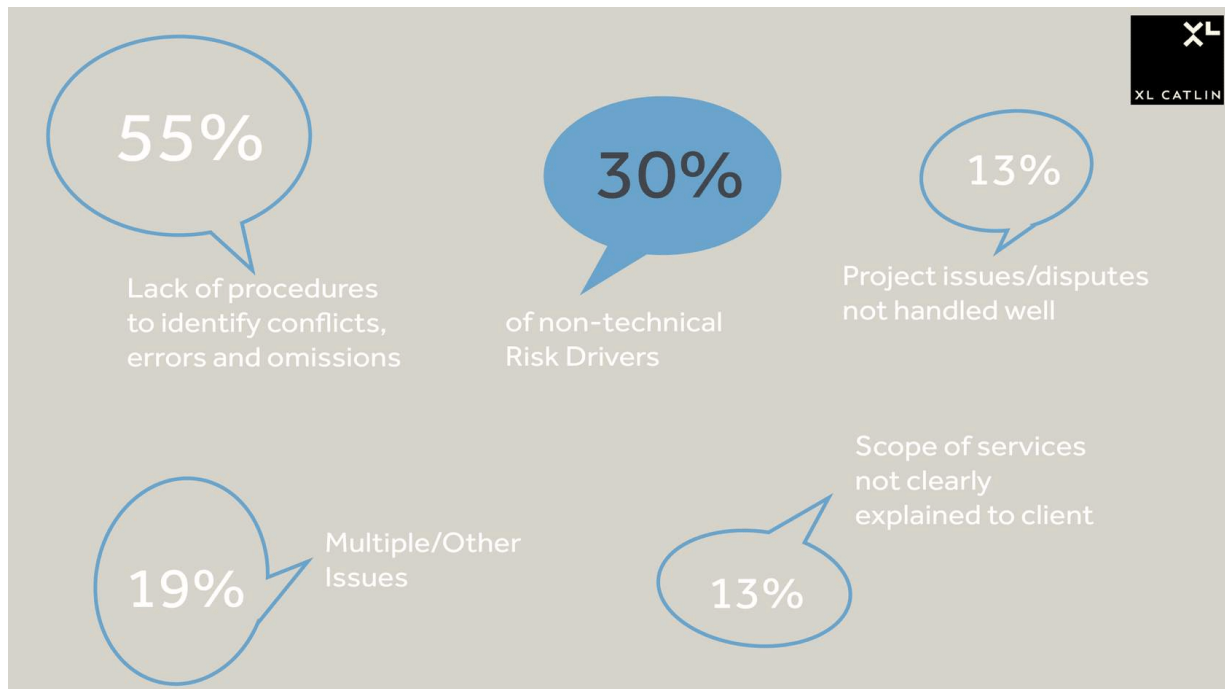
Click image to zoom

Let's take a closer look at this Communications Risk Driver.



00:25

Click play for audio



Click image to zoom

Risk Drivers - #1 by Claims Count

Communications is ranked #1 of the six Risk Drivers.

- Claims Dollars = 28% of the non-technical Risk Driver Claims Dollars
- 2009 Data – 39% of claims count (30% in 2016) & 29% of Claims Dollars (28% in 2016)

This new reduced number may not reflect a significant improvement in Communications since 2009.

The addition of Construction Phase Services and Quality Management Risk Drivers in this update may

capture elements of communication that were originally only manifested in the Communications Risk Driver.



00:35

Click play for audio

Hierarchy of Communication

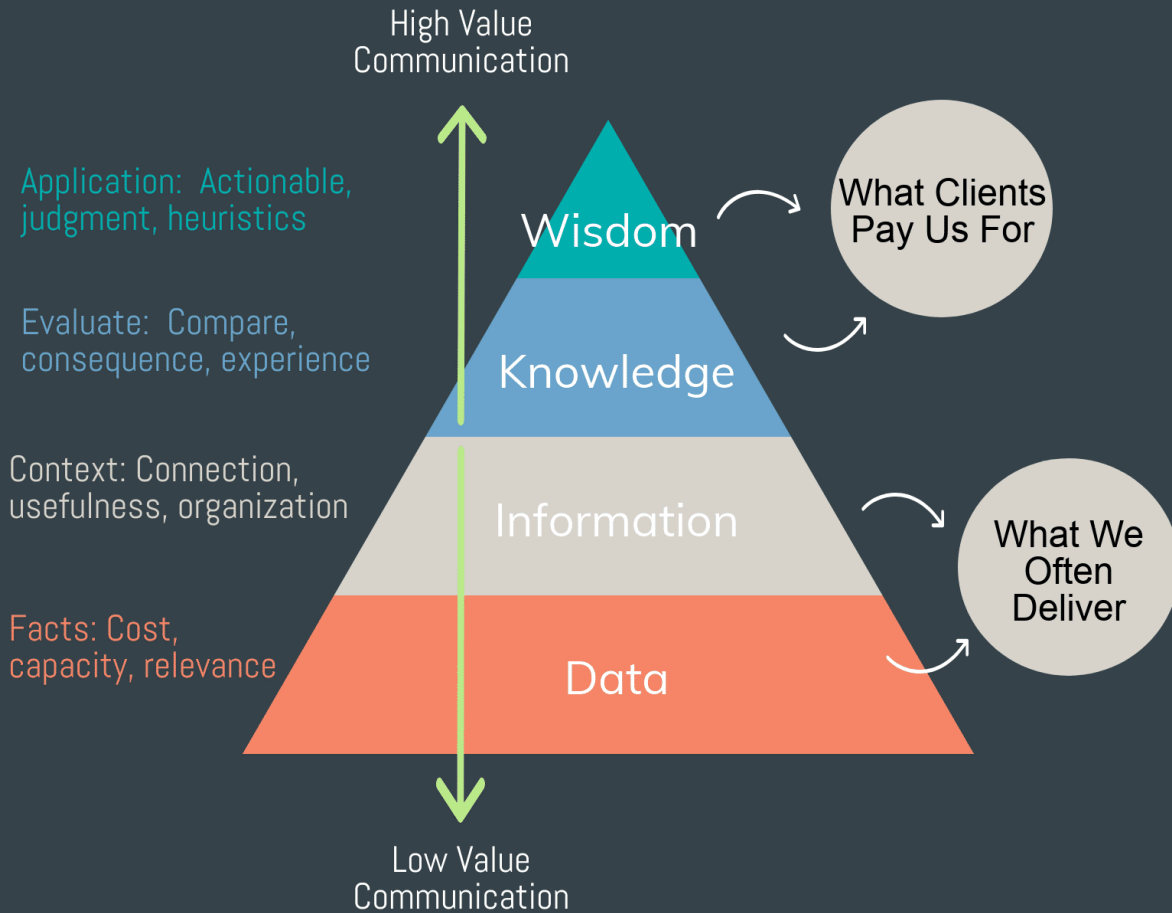


00:39

Click play for audio



DIKW



Click image to zoom in/out

DIKW Learning Theory

DIKW stands for Data, Information, Knowledge, and Wisdom. As you can see, the value of what you're transmitting goes up from data to wisdom.

Clients are paying you for your knowledge and wisdom, but frequently what they're getting is data and information. That knowledge and wisdom has to be applicable in the client's world or they won't pay for it. The more useful your knowledge and wisdom is to them, the more value it has; the more value it has, the more they will pay for it.

Communication in the Workplace

It is easy to take communicating for granted because it is a daily activity. But did you know:



 X Insurance

Did You Know

Click anywhere on the video frame to play

LET'S CONTINUE TO LESSON 2

LESSON 2

Interactive Exercise

Let's begin by going through an interactive sorting activity to learn about effective communication.

[LET'S PLAY](#)

What is Effective Communication?

Communication is effective when the receiver understands the message - just as the sender intended it.

Drag and drop each of the following communication definition cards to its designated box.

Effective Communication

Is two way

It reflects the accountability
of speaker and listener

It involves active listening

It is clear

It uses feedback



Ineffective Communication

Not listening

Speaking at the wrong level

Being critical and negative

Using poor non-verbal communication

Using excessive anger

Communication Guidelines

- 1 Purpose
- 2 Method of Delivery
- 3 Uncovering Expectations
- 4 Active Listening
- 5 Use Plain English

So how do we overcome the barriers to communication? Play the video below and keep these points in mind:



X Insurance



Click video frame to play/pause

1

Purpose - The OPEN Acronym



00:25

Click play for audio

Click each square card below to reveal.

Objective

Improve your communication skills

Plan

Discuss cost, barriers and solutions

Improved communication leads to

Expectation

**more successful projects,
happier clients, and
fewer claims**

Need

**Reduce the disputes and
claims that arise from poor
communications**

2

Method of Delivery



00:57

Click play for audio

Click each block below (or + sign) to expand for more details.

E-mail

Best used for planning, documenting, specific details



Text

Best used for short communication, non-complex, short answers



Voice-mail

—

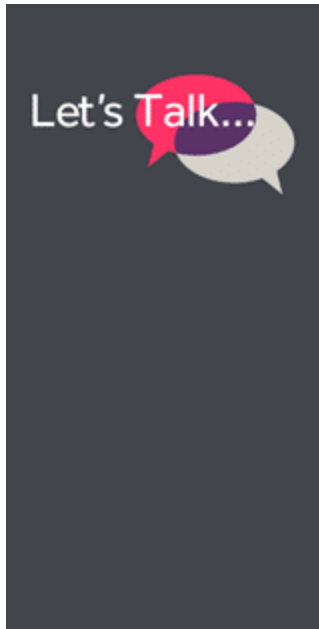
Best used for short communication, more detailed, less than 2-minutes long



Phone call

—

Best used for longer communication, more complex, more topics, more nuanced



Face-to-face

Best used for challenging communication, multiple people, consensus, resolving conflict



Uncovering Expectations

Unstated and Stated Expectations

REQUIREMENTS

- Stated
- Explicit (verbally, writing)
- Objective criteria
- Specific

EXPECTATIONS

REQUIREMENTS

- Unstated
- Personal
- Subjective
- Less specific

EXPECTATIONS



00:32

Click play for audio

**Uncover a person's pain and
define their priorities for a
project or a resolution to their
problem**

4

Helpful Steps to Active Listening



Listen

- To everything the person says
- With both your ears and your eyes

Don't pre-judge the person or the message

Take accurate notes to have an accurate memory

Confirm

- What you understand
- What you think you heard

5

Use Plain English



00:25

Click play for audio

Don't do this:

“The Company has attained marketplace success by its ability to differentiate itself by leveraging its proprietary technology. To distinguish ourselves by our technology, means we can focus our attention to sustain, support, and develop expertise, know-how, and capability.

To increase our concentration on our technology, we will create a global technology center. **The goal will be to increase our internal alignment, remove lost time and energy by removing redundancy in work, and to put the work where it belongs geographically.**

Increased focus puts the right work in the right place at the right time, giving us an even greater ability to compete.”

- EVP

Be Sure your E-mails are Clear!

To: johnbrown@designproaia.com

From: harrysmith@smithcontractinginc.com

John – good to see you at the site today. I want to substitute the fitzer valve you specified to AE4730 model. Please confirm that we can make the change and let me know if you are free for lunch Thursday.

Harry

From:

johnbrown@designproaia.com

To:

harrysmith@smithcontractinginc.com

Harry – yes

John



00:14

Click play for audio

Sample Email Footer



*All designs, plans, specifications and other contract documents (including all electronic files) prepared by XYZ firm shall remain the property of XYZ firm and XYZ firm retains all rights thereto, including but not limited to copyright, statutory and common-law rights thereto unless otherwise specified by contract. **No design changes or decisions made by e-mail shall be considered part of the contract documents unless otherwise specified,** and all design changes and/or decisions made by e-mail must be submitted as an RFI or a submittal unless otherwise specified.*

Electronics Communications Policy



01:12

Click play for audio



1. Formal Policy
2. E-mail practices
3. E-conversations

4. Social Media

5. Internet Security

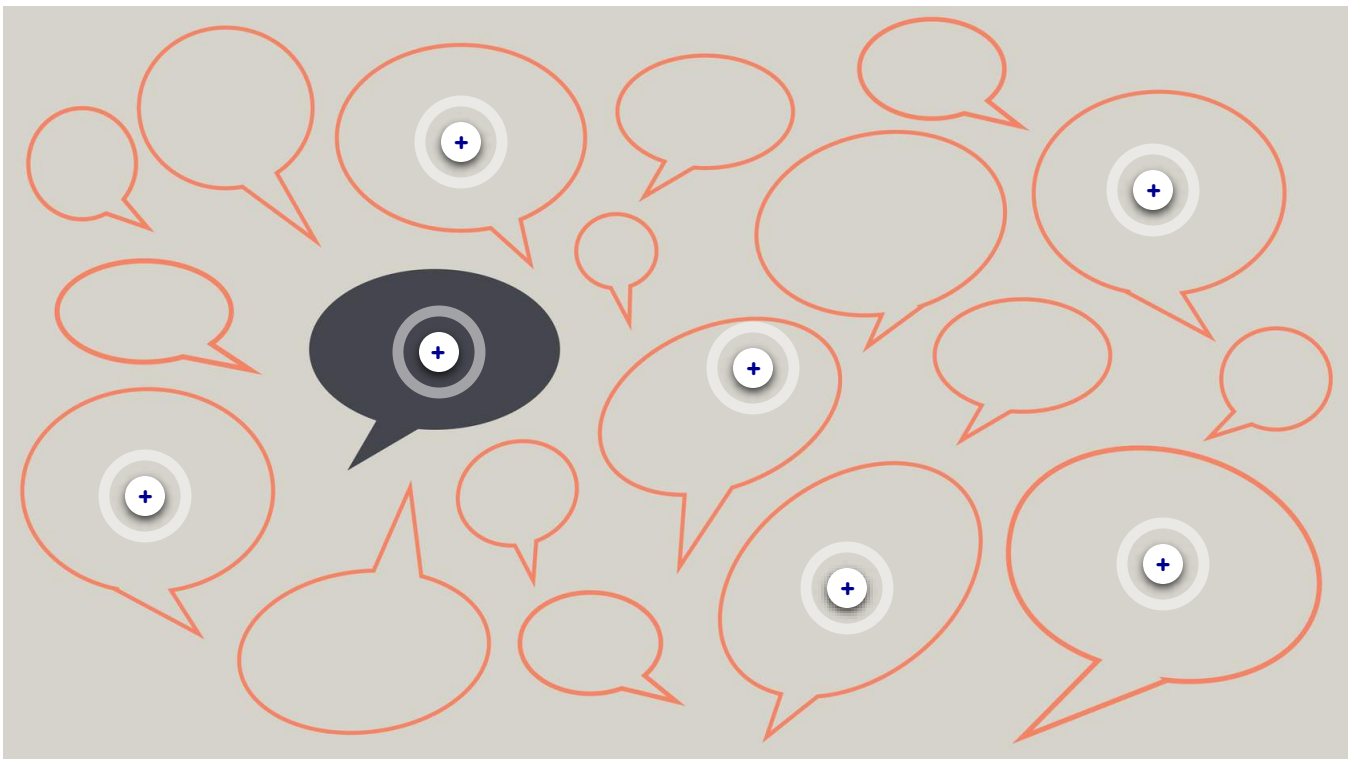
6. Virus Protection

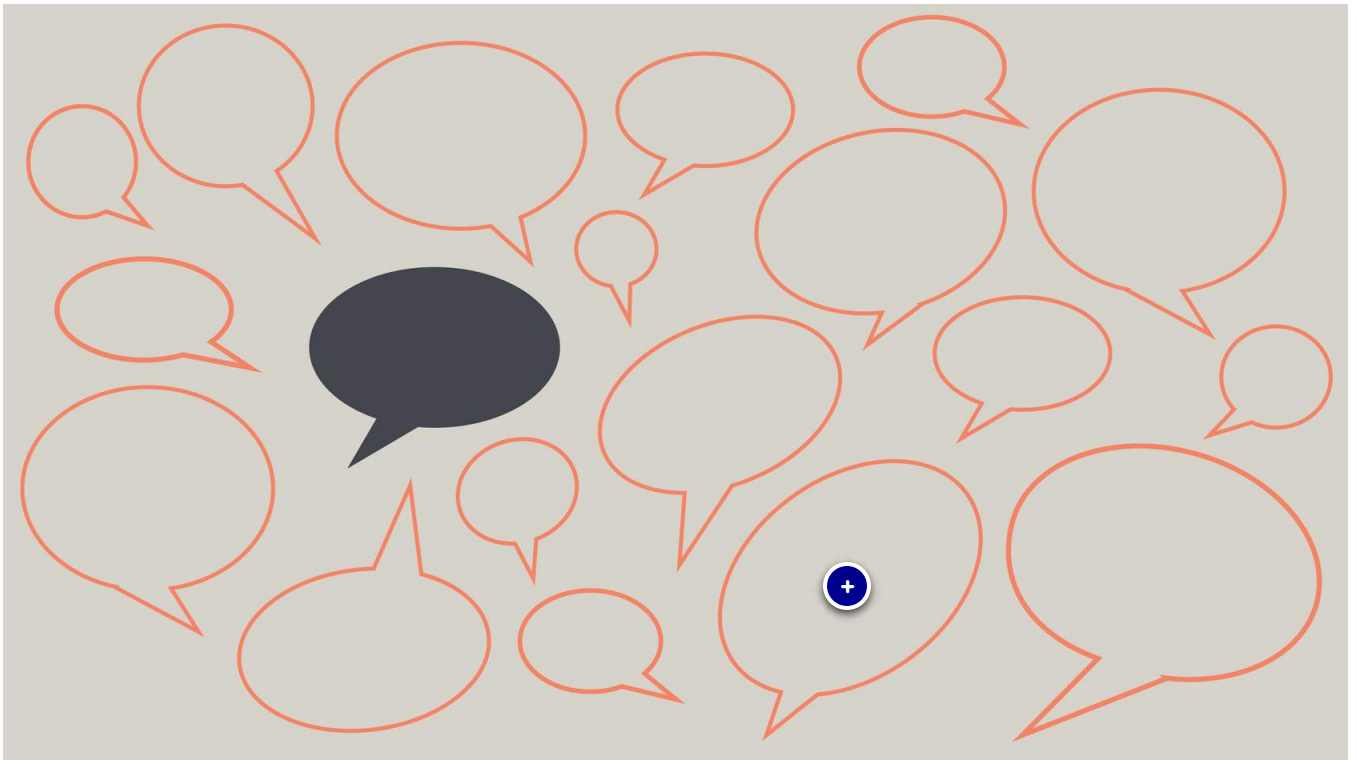
Social Media (Do not post)

- Information on the firm's performance
- Confidential or proprietary information
- Client's project/confidential information.

Written Communication

Click each label mark in the image below (+ circles) to learn more about written communication.

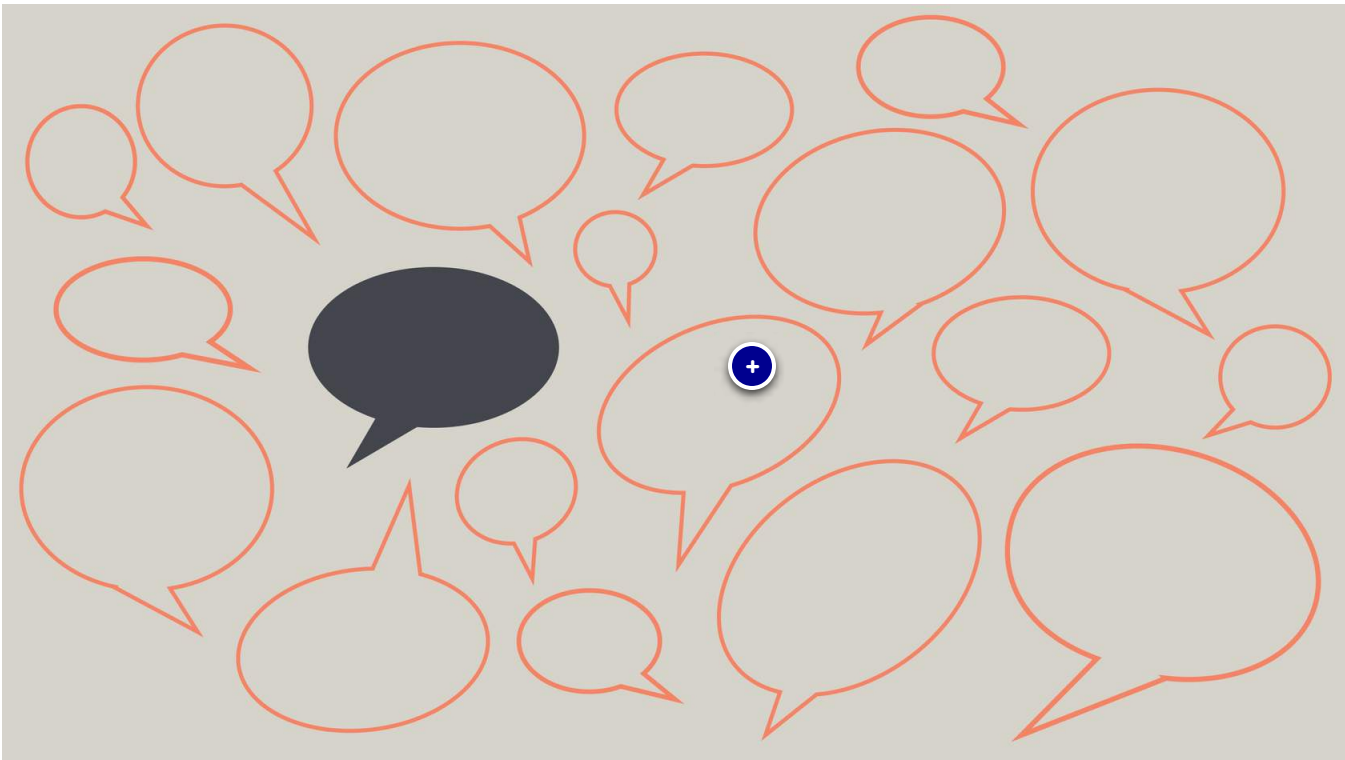




Be specific



Be brief



Avoid jargon



Edit, Revise & Delete



00:15

Sloppy or unclear writing in all forms of written communication.

Click play for audio.



Use concrete, familiar words



00:19

Click play for audio



Avoid red-flag words



00:19

Click play for audio.



"Think Twice" Words



00:36

Extreme

- Highest
- All
- Complete
- None
- Best
- Every

Promise

- Guarantee
- Certify

- Assure
- Will
- Shall
- Ensure

Multiple Meaning

- Inspect
- Estimate
- Supervise
- Optimize
- Oversee

A Claim Story



00:46

Click play for audio



“... maintaining
a high standard
of technical
competency ...
“...
thoroughness of
our
construction
documents ...”

“... exemplary
design,
long-term
building
performance
and
predictable
fiscal
responsibility ...”



“... virtually
leak free ...”

Click image to zoom in/out



00:34

Click play for audio

Website Marketing Communication



00:19

Click play for audio



“As an architect and project manager, John focuses on complete document set assembly and coordination among all disciplines involved. Such expert coordination is necessary for delivery of **error-free documents on schedule.**”

- **John Smith, LEED AP BD+C**

Senior Associate

Killer Comments



00:55

Click play for audio

You

Always/Never

Should

Try

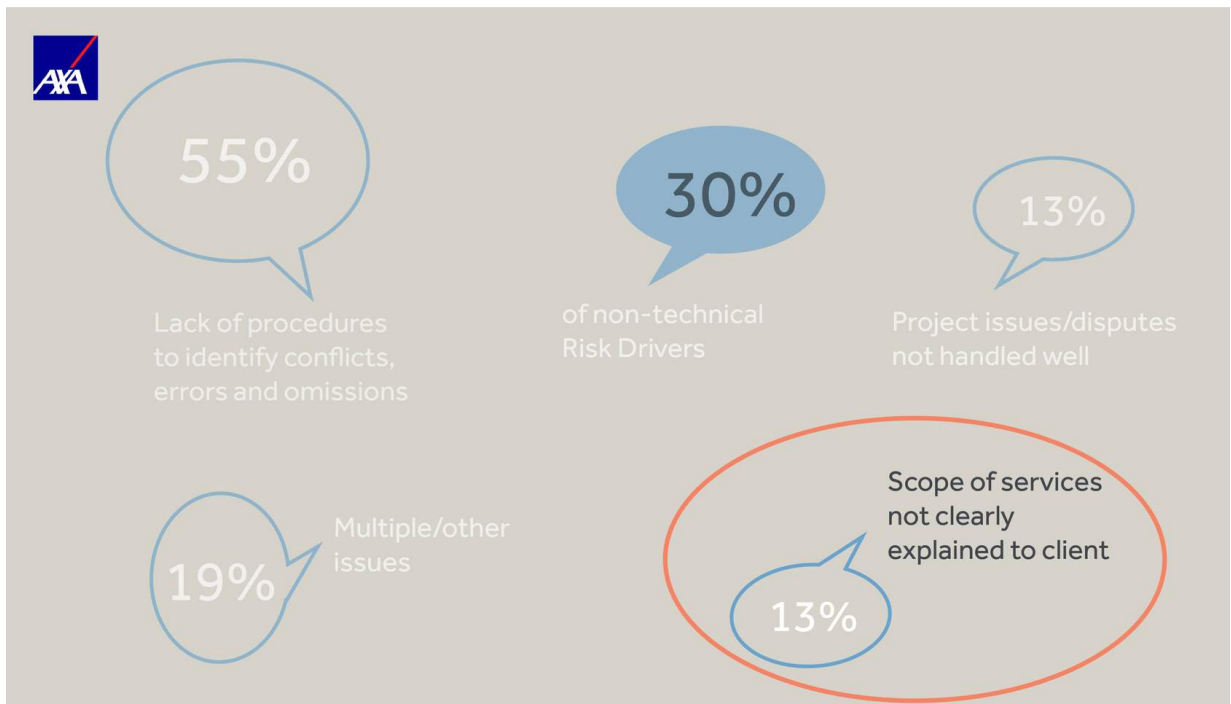
Yes, but...

LET'S CONTINUE TO LESSON 3

LESSON 3

Scope of Services

Confirm your Scope of Services before starting the work.



Click image to zoom in/out

Click play for audio

Project Management Plan (PMP) Components

- Goals, Objectives
- Scope-of-Work
- Budget
- Schedule
- Team
- Document Distribution
- Project Communication
- Risk Management
- Quality Management
- Change Management

PMP - First Prepared Document of Your Project



00:40

Click play for audio

PREPARATION PROCESS

INTERNAL KICK-OFF MEETING

CLIENT KICK-OFF MEETING

- Discuss with team
- Ask for their input
- Address all sections of the PMP



PREPARATION PROCESS

INTERNAL KICK-OFF MEETING

CLIENT KICK-OFF MEETING

- Review Draft PMP
 - team

- consultants

- Objectives
- Project risks



PREPARATION PROCESS	INTERNAL KICK-OFF MEETING	CLIENT KICK-OFF MEETING
<ul style="list-style-type: none">• Involve all key project members• Confirm client expectations• Discuss change procedure		

Let's Talk...



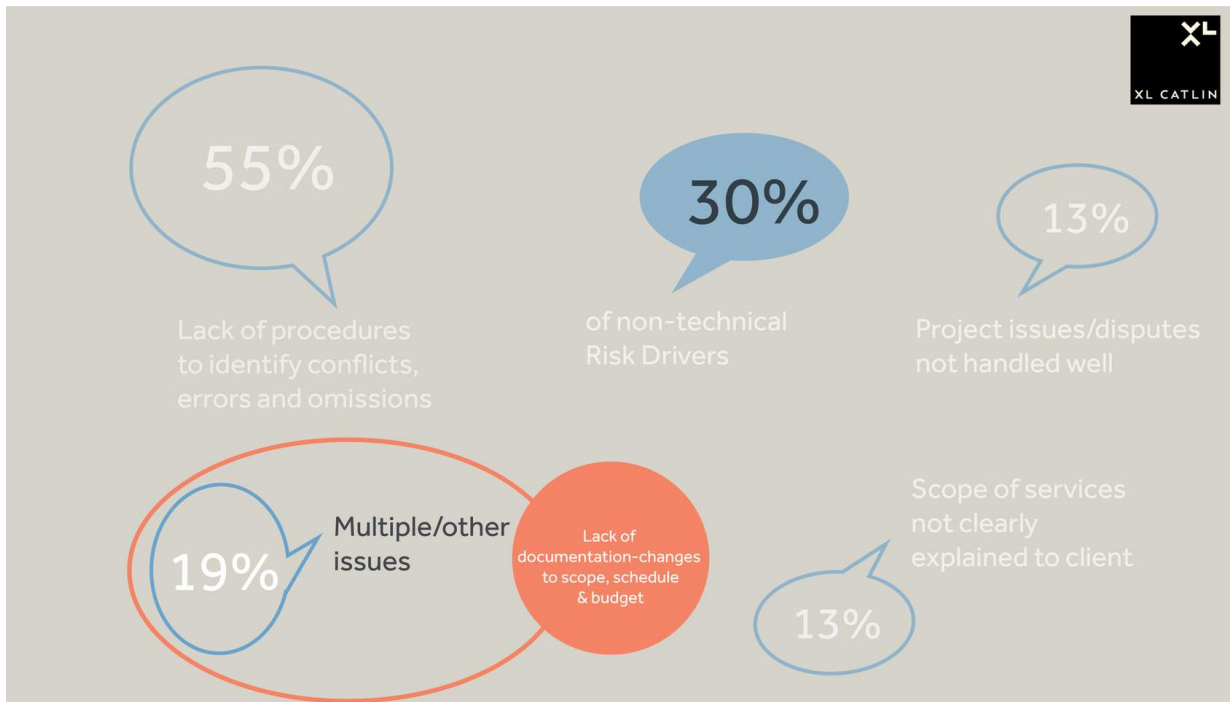
Scope Creep Video

Without formal documentation, there are some changes that creep into your scope. The video bellow illustrates some typical causes.



Click video frame to play/pause

Scope & Change Management



Click image to zoom in/out

What is change?



00:19

Click play for audio

Click Scope Change & Scope Creep square cards below for definitions.

Scope Change (Additional Services)

Any change to the project scope that almost always requires an adjustment to the project cost or schedule.

Scope Creep

Adding features to project without addressing the effects on time, costs, resources or without client approval.

Managing Change



00:28

Click play for audio

1

Recognize & identify change

2

Leverage

3

Define impact of change

4

Obtain approval for change

5

Document change

6

Complete additional scope.

1

Recognize & Identify Change



01:05

Click play for audio

- Complete monthly review of project progress with PIC
- Discuss client requested changes as they arise
- Check-in with the project team.

2

Scope & Change Management - Knowledge Check

Leverage

When do you have the *most* leverage to get approval for a change order (add service)?



- While you're working on the additional scope?
- When you've completed the additional scope?
- Before starting work on the additional scope?
- When you've submitted the work to the client?

SUBMIT

CONTINUE

3

Define Impact of Change to the following:



00:30

Click play for audio



- Scope of work
 - Budget
 - Schedule
 - Staff requirements
 - Quality
 - Risks to project
-

Obtain Approval



00:32

Click play for audio

Change Order Form

Select one:	Date:	Project Name:
<input type="checkbox"/> New Scope	Change Order No.:	Project Manager:
<input type="checkbox"/> Increase in Scope	Project Number:	Client Rep.:
<input type="checkbox"/> Decrease in Scope	Task Number:	
Current Scope of Work		
<i>(Describe the requirements/specifications)</i>		
Reason for Change		
<i>(Describe in detail the reason for the change)</i>		
Proposed Scope of Work Change		
<i>(Describe in detail the reason for the change)</i>		
Cost Estimate (attach backup)		
Schedule Impact (attach backup)		
Project Manager:	Authorized Client Representative:	
Signature:	Signature:	

Change Management - Communicate & Document Change



00:39

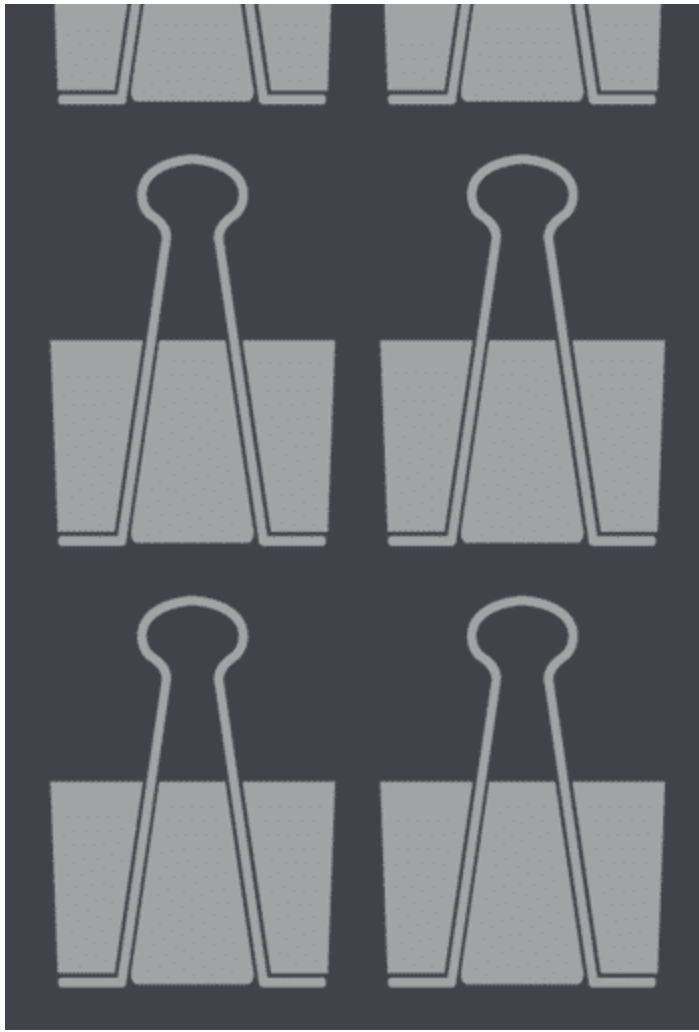
Click play for audio

Communicate Change

1. E-mail
2. Meeting notes
3. Progress Reports

Document Change

1. Revise
 - a. Project Management
 - b. Plan
 - c. Contract
2. Update
 - a. Accounting system
 - b. Project & task schedules



Good Documentation

If it wasn't in writing, it didn't happen.

Protects you in case of a dispute.



00:06

Click play for audio.

Provides basis for effective project communication.



00:18

Internally and externally.

Establish an internal documentation policy.



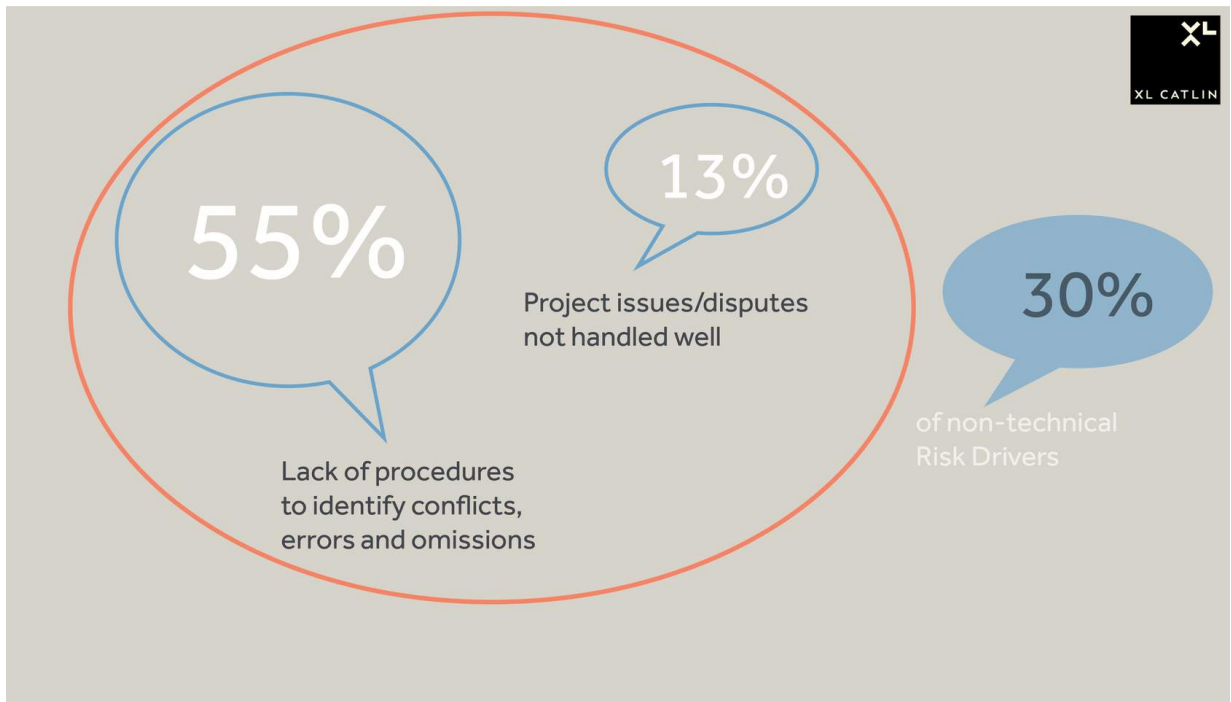
Click play for audio.

LET'S CONTINUE TO LESSON 4

Typical Early Warning Signs

▶ ● 01:07

Click play for audio



<p>CONCERN</p>	<p>ISSUE</p>
-----------------------	---------------------

- Communication
- Fees
- Change in participant
- Change of key personnel
- RFI (Request for Information)

CONCERN

ISSUE

= breakdowns

= not being paid

= attitude or behavior

= by owner or contractor

= abuse of the process

Lack of Procedures to Identify Conflicts, Omissions, and Errors

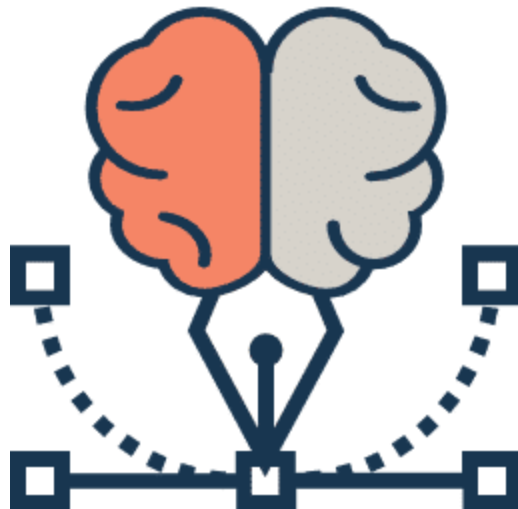


00:36

Situational Awareness

- Many disputes are cumulative
- If addressed quickly, not all problems evolve into disputes
- Identify problems early.

The longer resolution is put off, the more expensive it is to correct.



Establish Procedures to Identify or Address Conflicts, Omissions, Errors

Look for early warning signs consistently and often



00:19



Designate a primary contact within your firm for notification of issues/conflicts



00:06



Develop and communicate a procedure to resolve issues at appropriate levels of authority



00:06



Provide direction and training as to what to do when a problem arises



00:07



Resolving Problems

What's the GOAL?

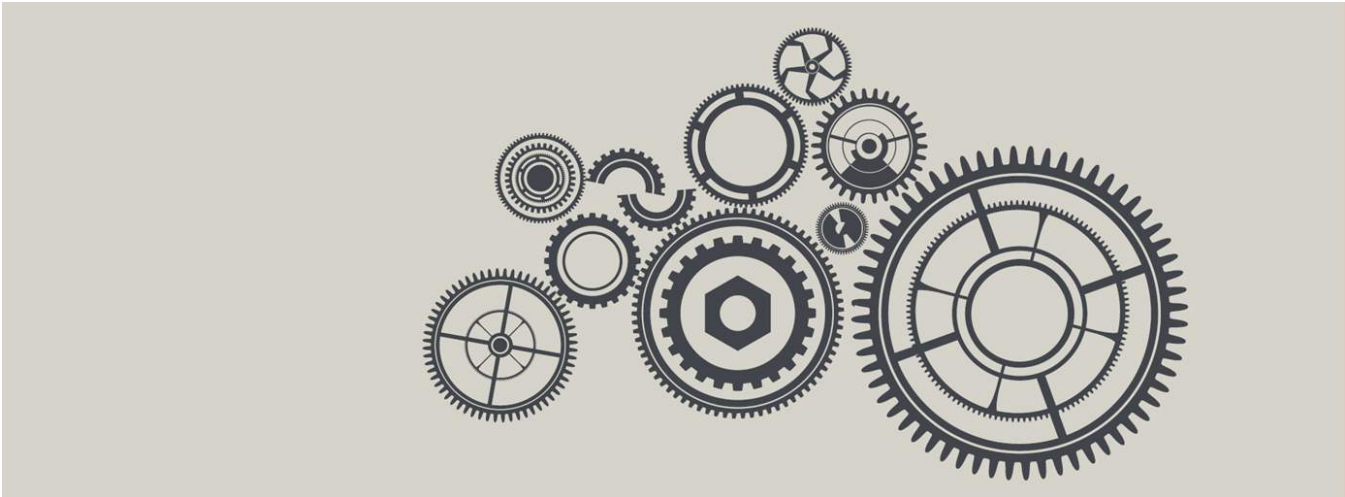
To stop the escalation of an issue into a dispute or need to have a third party resolution.

Click on the right arrow to review all the steps to resolving problems.

Develop a Proactive Culture



Respond at the First Indication of a Problem



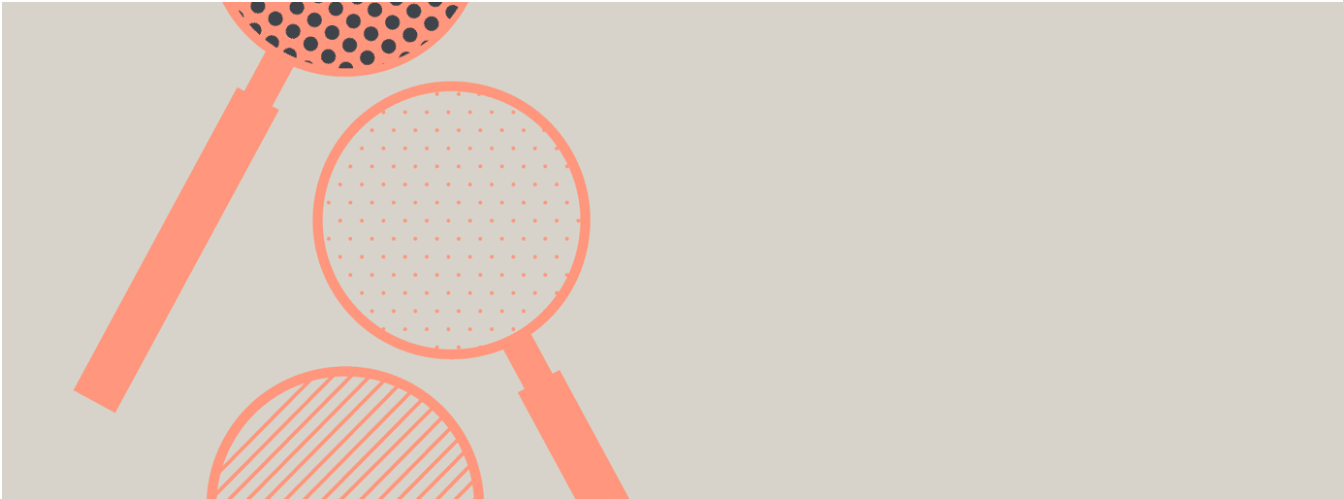
Gather facts



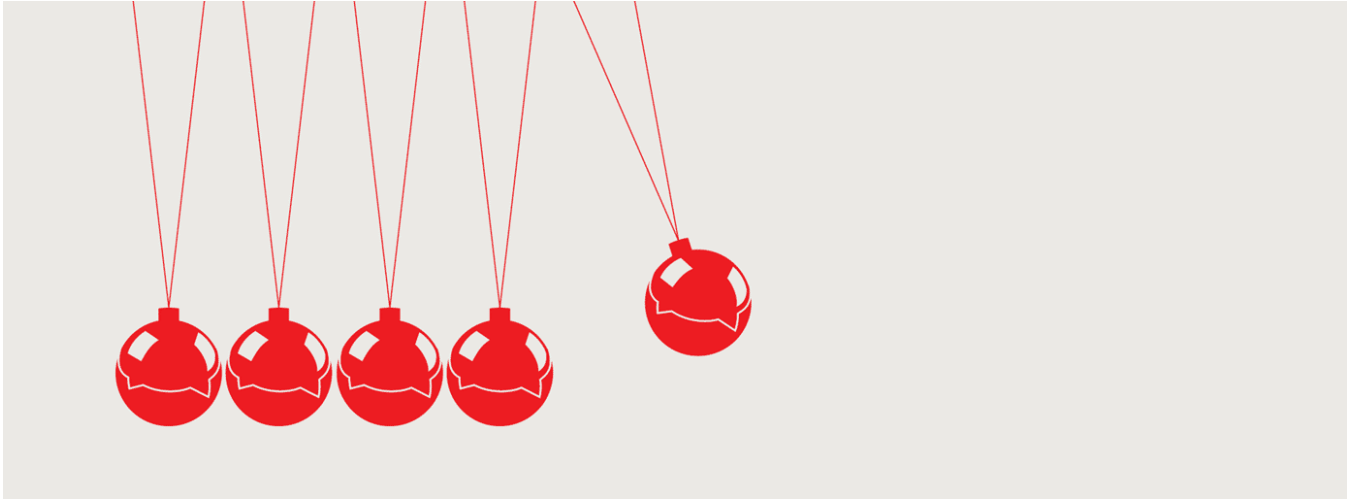
Commit to Resolving the Issue



00:12



Remove Emotion



The Problem & The Solution

The Problem - Cost of Poor Communication



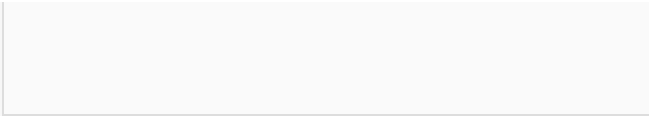
00:23

Click play for audio

Click the arrows below to view the 9 potential cost of poor communication.

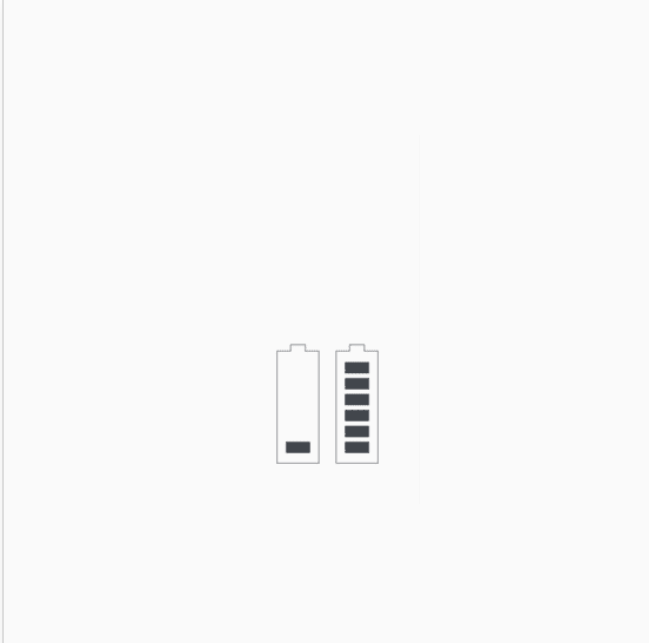
Damaged Relationships





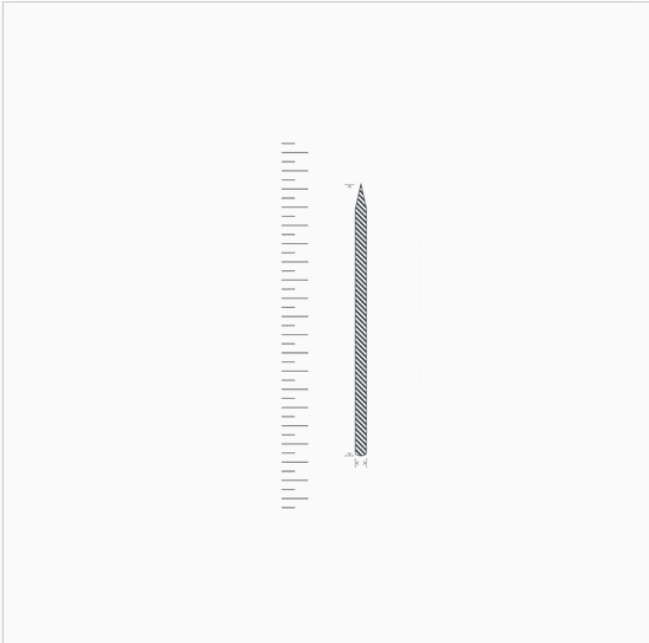
1 of 9

Loss of Productivity



2 of 9

Inefficiency and rework



3 of 9



Conflict



4 of 9

Missed Opportunities



5 of 9

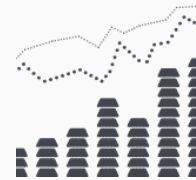


Schedule Slippage



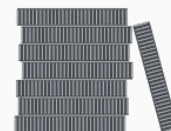
6 of 9

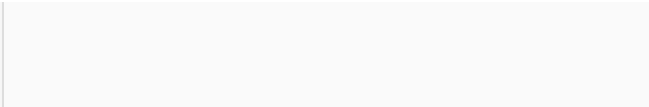
Scope Creep...or Leap



7 of 9

Wasted Resources





8 of 9

Unclear or Unmet Requirements



9 of 9

The Solution - Communication Best Practices



00:36

Click play for audio





- Five steps to better outcomes
- Clear emails
- Avoid “Think Twice” words
- Avoid “Killer” comments
- Use a PMP
- Conduct a Kick-off meeting
- Manage scope change

- Practice situational awareness
- Develop proactive firm culture
- Develop firm policies
 - Electronic communication
 - Resolution processes
 - Firm “risk manager”

YOU'VE FINISHED! LET'S CONTINUE TO THE COURSE ASSESSMENT

POST-ASSESSMENT

Post Assessment

Instructions:

1. True/false, multiple-choice questions.
 2. Must be taken from start to finish.
 3. 80% passing score.
 4. Allowed one retake.
-

Question

01/10

Communications is the number 1 non-technical Risk Driver (by claims count)?

True

False

Question

02/10

Effective communication is when the recipient understands the message sent just as the sender intended it?

True

False

Question

03/10

The DIKW Acronym stands for?

- Data, Inclination, Knowing Wisdom**
- Data, Information, Knowledge & Wisdom**
- Don't Inform Knowledge Wisdom**
- Incorrect answer**

Question

04/10

75% of communication is non-verbal?

False

True

Question

05/10

The communication OPEN model includes all of the following explanations to the recipient, *EXCEPT* (choose one):

- Objective**
- Plan**
- Expectation**
- Need**
- Cost**

Question

06/10

Identify which of the following is *NOT* one of the general communication guidelines (choose one):

- Be clear about the purpose of your communication**
- Address cross-cultural barriers & use plain english**
- Use ALL CAPS to emphasize a point**
- Consider the reader's point of view**
- Be an active listener**

Question

07/10

Every firm should have a formal electronic communications policy?

True

False

Question

08/10

As you work with your clients and set forth a communications strategy, it is recommended that you should send a project status report every_____ ?

- Day**
- Week**
- Two weeks**
- Month**

Question

09/10

The Project Management Plan (PMP) is the first prepared document of your project.

True

False

Question

10/10

Identify which of the following is *NOT* one of the six steps to managing change (choose one).

- Recognize & identify change**
- Leverage**
- Silence**
- Define impact of change**
- Obtain approval for change**
- Document Change**
- Complete additional scope**

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