



Design Documentation: Avoiding the Top 10 Mistakes

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Design Documentation: Avoiding the Top 10 Mistakes

Moderator

John R. Hardy, President/CEO, The John Hardy Group

Panelists

**Robert MacKenzie, formerly Senior Vice President,
Cornerstone Real Estate Advisers**

Roger Hill, Chairman/CEO, Gettys

Martin Stringfellow, Principal, Martin B. Stringfellow Company

Bob Harnach, President, Richmond Textiles

Design Documentation: Avoiding the Top 10 Mistakes

Owner / Investor

Robert Mackenzie

Top Issues:

- 1. Failure to recognize your limitations**
- 2. Local labor limitations (skill, quality)**
- 3. Project team / poor communication & coordination**
- 4. Multiple Owners & decision process**
- 5. Fast-track process knowledge**
- 6. Designer's inability to recognize budget, time, quality**
- 7. Inexperienced Owner**
- 8. Design & Scope**
- 9. Owner / Operator conflicts**
- 10. Different documents**
- 11. Absentee Owner / lack of "hands on" involvement**

Design Documentation: Avoiding the Top 10 Mistakes

Owner / Investor

Robert Mackenzie

Top 2 Issues and Solutions:

1. Project team poor communication and coordination

- a. Weekly meeting (phone and in person) & documented
- b. Original chart delegation of Owner coordination
- c. Up-front project scope & budget
- d. Defined deliverables
- e. Clear project scoping – in original RFP updates

2. Multiple Owners and decision process

- a. Clear identification of Owner's authority
- b. Clear identification of P.S. & Owner's agent
- c. Communication clarity of financial side
- d. Sign-off process (formal)
- e. Inexperienced Owners; teach process

Design Documentation: Avoiding the Top 10 Mistakes



Project Management

John R. Hardy

Top Issues:

- 1. Ability to design on budget**
- 2. Under Contingency**
- 3. Clear definitions of responsibility**
- 4. Alternative selections**
- 5. Expectations of Owners & Contractors**
- 6. Lack of Communications**
- 7. Unrealistic schedules**
- 8. Mismatch of Subs to Project Components**
- 9. Definition of control & authority**
- 10. Accountability responsibility – Authority role of participants**

Design Documentation: Avoiding the Top 10 Mistakes

Project Management

John R. Hardy

Top 2 Issues and Solutions:

1. Ability to design on budget

- a. Scope – Clear Definition
- b. Experienced Team
- c. Support whole process
- d. Provide parameters for team
- e. Design budget in Control
- f. Budget Updates for team budget
- g. Owner approvals
- h. Verify budget assumptions prior to start
- i. Budget Alternatives – Add alternates

2. Lack of Communications

- a. Decision makers identified
- b. Change Management
- c. Distribution of Decisions
- d. Consistent Documentation
- e. Limit meeting with agenda stake-hold
- f. Appropriate meeting timing
- g. Regular communication of changes with key decision makers for change management
- h. Coordinate with operations
- i. Timeline schedule

Design Documentation: Avoiding the Top 10 Mistakes



Design

Roger Hill

Top Issues:

1. **Building accurate budget & working from it**
2. **Not enough time to do work**
3. **Scope vision vs. budget**
4. **Changes in the field & communication**
5. **Brand Standards & approvals**
6. **Contract quality specs**
7. **Lead times**
8. **Designer-Scapegoat**
9. **Client changes mind & won't admit it**
10. **Project team & cross selling**

Design Documentation: Avoiding the Top 10 Mistakes

Design Roger Hill

Top 2 Issues and Solutions:

1. Not enough time to do work

- a. More Resources
- b. Use past projects for evaluations
- c. Web based budget tool
- d. Increase Fees
- e. Reverse incentive
- f. Don't hold the bag for others
- g. Refuse to do work if it causes future problems
- h. Team building

2. Changes in the field & communications

- a. Weekly meetings
- b. Incumbent on team to educate client
- c. Include Owners & document all meetings
- d. Acknowledge all vocal communications
- e. Educate and communicate changes in the project
- f. Be a "Bill" not a "Kwame"
- g. Say "No" when necessary
- h. When not meeting standards – document
- i. Clear documents at the beginning from all concerned
- j. Clear and concise documentation

Design Documentation: Avoiding the Top 10 Mistakes

Procurement

Martin Stringfellow

Top Issues:

1. **Specifying items without regard to budget / schedule**
2. **Underestimating complexity of task**
3. **Issuing final FF&E specification document with incomplete "TBS" or "TBD"**

Design Documentation: Avoiding the Top 10 Mistakes



Procurement

Martin Stringfellow

Top 2 Issues and Solutions:

1. Specify items without regard to budget / schedule

- a. Joint effort between I.D. & P.A. on determining line item budget & schedule
- b. Establish preferred vendor list

2. Underestimate the complexity of task

- a. Question the RFP
- b. Define owner responsibilities
- c. Giving inexperienced people senior design responsibility
- d. Called laziness amongst team members – Lack of follow through

Design Documentation: Avoiding the Top 10 Mistakes

Vendor

Bob Harnach

Top Issues:

1. **No Gant chart (Time Frame Chart) Microsoft**
2. **Specification Documents Incomplete**
3. **Drawings Incomplete**
4. **Delay in order process**
5. **Incorrect order information**
6. **Substitutions**
7. **Backorders**
8. **Foreign Sourcing of Goods**
9. **Delivery**
10. **Lack of coordination of installation**
11. **Code Compliance**
12. **Quality Control Issues**
13. **Shop drawing process**
14. **Not acknowledging the acknowledgement**
15. **Too much conflicting paperwork. Not in digital**
16. **Using E-mail without documenting**
17. **No design picture lack of confidentiality**
18. **Over promising Rep./ Poor Reps**

Design Documentation: Avoiding the Top 10 Mistakes

Vendor Bob Harnach

Top 2 Issues and Solutions:

1. Specifications incomplete

- a. Write it for them
- b. Standardized Specification form
- c. Better communications
 - Pre-meeting to discuss specifications
 - Post-meeting to discuss specifications
 - Pro-active
 - Attach Specs to sample
- d. Acknowledging the acknowledgment
- e. Double check Specifications
- f. Penalty clause

2. Over promising Reps or poor Reps

- a. Good training
- b. Inside & outside contact
- c. Knowing cost
- d. Training for customer



Our Conclusion

- 1. Project team poor communication and coordination**
- 2. Multiple Owners and decision process**
- 3. Ability to design on budget**
- 4. Lack of Communications**
- 5. Not enough time to do work**
- 6. Changes in the field & & communications**
- 7. Specify items without regard to budget / schedule**
- 8. Over promising Reps or poor Reps**
- 9. Specifications incomplete**
- 10. Over promising Reps or poor Reps**