



THE FIVE GOLDEN RULES FOR PREPARING A BRIEF FOR YOUR PROJECT

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Introduction

If you're part of a client organisation responsible for a capital project or a change management programme, you need project management to ensure that you get the right results, on time and within the agreed budget.

Good project management fosters efficient, collaborative working between the client, their advisers and contractors. This should be orchestrated by the project manager, who is responsible for planning and communicating what needs to be done, in which order and by whom.

In order to promote an understanding between all participants in a project, we have produced a series of booklets that describe how key elements of every project should be managed.

I have worked on many capital projects for diverse clients in the public and private sectors and have found that projects are most successful when a brief is jointly prepared by the client and project manager to utilise the best from their different perspectives and experiences.

I would like to share this experience as widely as possible so I have written this booklet to summarise good practice in preparing a brief.

Best wishes

A handwritten signature in black ink, appearing to read 'P. Wilson', with a stylized flourish at the end.

Paul Wilson

The importance of a good brief

It may be a statement of the obvious to say that a good brief is important to the success of a project, but unfortunately this does not automatically mean that most projects have one.

The most damaging fault in a brief is when there are omissions because these are things that will need to be incorporated into the design at some stage, often when it is too late to do it properly.

Some omissions are fundamental, such as failing to specify that an area requires air-conditioning or some specific equipment. Others are more a matter of detail, such as failing to specify the level of quality of a particular element of the building.

By their very nature, omissions lead to additional costs. They can also cause disruption and delays, which in turn lead to even higher consequential costs.

Successful projects start well because they have a good brief, and the whole project team work hard to prepare an initial cost plan and financing plan that is robust and allows the project to be completed within the budget. A good brief is therefore one which is well thought out and will avoid surprises during the course of the project.

The basics of preparing a brief

In order to create a good brief, you need to take your time, bring together as much experience as possible and work in a systematic way.

If you have already appointed professional advisers, they will almost certainly encourage you to prepare as detailed a brief as possible because they need as much knowledge as you can provide about what you intend to do and it is convenient if you 'lay it on a plate' for them.

I see things slightly differently. A brief is not something that the client prepares and hands over to a design team like a baton in a relay race. It should be created as part of a process of collaboration, all organised by your project manager.

In my experience, there are 5 golden rules that must be applied if you are going to have a brief that leads to a successful project, and it is imperative that you take these into account when you are preparing your brief.

These 5 golden rules were established by studying what makes a project successful and what causes problems. You only have one chance to make your project successful, so I have set out the golden rules in the following sections of this booklet.

How to prepare your brief

You have choices about how you prepare your brief. Some people call it an art and others call it a science. In reality, it is a bit of both.

There will be many parts of the brief which might be called “scientific”. Examples of this are specific details about key pieces of equipment that are vital to the work that you do. If you specify them in detail, your design team can consider the implications of incorporating them in the design and also consider other aspects such as access to mechanical and electrical services.

When it comes to the artistic part of your brief, it’s a matter of describing what you want in terms that can be understood by other people. Do not be tempted into using technical language if it can be avoided. Imagine that you are describing things on a one-to-one basis. This will help you to get the tone right and avoid jargon.

Where you feel that there are different options, say so. This allows for professional advisers to make suggestions and consider options with you, which will help you to decide which is the best solution.

Golden Rule 1

Do not prepare a brief on your own.

You are the client for the project and cannot reasonably be expected to be an expert on every aspect of it.

As a result we strongly advocate that you prepare a brief in collaboration with a suitable expert – or even a group of them. For example, you might want to talk to a project manager, architect, engineer or contractor about your requirements. Each of them has specialist expertise and the chances are that they will have more knowledge collectively than most client organisations can have internally.

They are also much more likely to have up-to-the-minute information and invaluable tips that they have picked up by working for other clients. You are likely to find that they have examples of briefs, specifications, room data sheets, equipment schedules and other information from similar projects, which can be an invaluable checklist if you apply them intelligently.

If you do this properly, it will elicit invaluable information from each member of your design team, will save you time and will be the start of a good working relationship.

Golden Rule 2

Do not put “pen to paper” too early.

Immediately after you have established the need for a project, it is better to call people in to discuss it with you in its broadest context, rather than jumping in immediately to prepare a written brief.

It is amazing how many times clients find that they can achieve their objectives without having a project of the scale, complexity and extended delivery time that they originally thought.

If you prepare a written brief too early, your project manager and design team will respond to it. If, on the other hand, you talk to them informally before you put pen to paper on the brief, you could have a much more affordable solution.

The early discussions help you to firm up your ideas and establish your priorities. They are also a good way of managing expectations, as most briefs start off with too high a level of specification and then need to be trimmed later.

You should, in any event, allow your brief to go through several rounds of discussion so that you can make it increasingly robust. These iterations are inevitable and due time should be allowed for them in your programme.

Golden Rule 3

Think about what you are trying to achieve – not how you are going to do it.

Too often, clients jump immediately into design and encapsulate this in their brief. For example, they might say: ‘We need to expand output by 40%; this is the accommodation that we have now and we therefore need to build xxx square metres of new accommodation for additional people and equipment.’

There are two problems with this approach:

1. It is too prescriptive.
2. It fails to take account of the development of new ways of working and advances in technology.

The majority of existing operations have considerable scope for modernisation, and this usually means having smaller equipment and accommodation.

Consider every question as part of a giant checklist that helps you to achieve certainty about what will eventually be included in your brief.

Try to express your requirements by saying things like ‘We need a seating area capable of dealing with people waiting for our service at peak times’, rather than ‘We need Y seats’.

Golden Rule 4

Be open to questions and challenges by your professional team.

It is not a criticism of your expertise as a client if your professional team raise questions about what you want to include in your brief. It is in your interests to be open-minded, because you never know when they will come up with an idea that saves you months on delivery time or makes considerable savings in cost.

This rule goes hand in hand with the previous three. If you have put pen to paper too early or have been too prescriptive, you have by definition limited your options. If you have a good design team and they question or challenge some of the statements in your brief, there is a danger that it can appear to be critical.

It is therefore important for you to consider this as collaborative working and challenge as a natural part of preparing your brief so that you can respond to sensible suggestions and make the brief as effective as possible without feeling defensive.

Golden Rule 5

Do not over-think the detail – concentrate on priorities.

One of the most common mistakes is to spend too much time thinking about the detail on every element of the building, from light fittings to door handles.

This can often be counterproductive and cost you more money. It certainly means that a lot of people in your organisation will spend too much time on things that they are not necessarily qualified to do.

This does not mean that you should avoid detail, merely that you should concentrate on priorities and leave your design team to make the other decisions for you.

For example, surgeons should be involved in selecting which operating theatre lights and gas consoles are appropriate for them. A restaurant client needs to be involved in the selection of kitchen equipment; however, they may not want to comment too much on the accessories in the cloak room.

To put this in perspective, 97% of the buildings in this country are not occupied by the client that had commissioned them in the first place, and yet they function perfectly well.

Recommendations

As a result we recommend the following:

1. Remember the 5 Golden Rules:

- Do not prepare a brief on your own.
- Do not 'put pen to paper' too early.
- Think about what you are trying to achieve – not how you are trying to achieve it.
- Be open to questions and challenges by your professional team.
- Do not over-think the detail – concentrate on priorities.

2. Think of preparing a brief as a two-part process:

- Informal discussions to check the basis of your approach and gather new ideas.
- Formal brief preparation in conjunction with your professional team.

3. Appoint the right project manager – See “What to Demand from your Project Manager”.

4. Appoint a design team that can assist you with the brief – See “How to Appoint the Right Design Team”.

5. Appoint your advisers as early as possible.

6. Consult as widely as possible with colleagues in your organisation.

7. Speak to people in other organisations that have carried out similar projects.

About Provelio

In our experience, most organisations in both the public and private sectors have the same broad objectives, which are:

To deliver their core services and control their three biggest assets (and costs), which are people, buildings and technology

To achieve these objectives, it is sometimes necessary to carry out a capital project or a change management programme.

We provide professional management services to carry out such projects, ensuring that our clients can go through this transition phase as smoothly as possible, whilst being able to carry out ‘business as usual’. These services include:

- Strategic Management
- Project Management
- Change Management
- Cost Reduction
- Procurement and Contract Management

We believe that management is not just about processes and best practice. It is about fostering good, motivational relationships between people. We therefore deliver management solutions with integrity, transparency, clarity and a constructive style.

You will find more details and a substantial number of downloadable guidance notes from our website:

www.provelio.com



The Five Golden Rules for Preparing a Brief for your Project

One of the key aspects of managing a project is preparing a brief at the outset. It is an uncomfortable fact that a lot of projects make a start without giving due attention to this crucial stage. Inevitably, the usual result of an ill-conceived brief is confusion, delays and additional costs.

The only way of avoiding such a horror story is to apply best practice in preparing a brief. You can do this by following tried and tested methods.

In this booklet, Paul Wilson, the Managing Director of Provelio Limited sets out the key factors that you should take into account when you are preparing your brief, including:

- Why a good brief is so important
- The most common mistake in preparing a brief
- The 5 golden rules for preparing a brief
- The 2 stages of preparing your brief

Paul's advice is drawn from his substantial experience in managing capital projects and change management programmes for major clients in the public and private sectors. He explains what works, and this booklet is brief, to the point and entirely free of jargon.

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