

# CLIENT – CONSULTING ENGINEER

**Best Practice**

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## Best Practice

- ◆ The CESA Practice NOTE PN42 describes the process of implementing a complex multi-disciplinary project. This Best Practice webinar puts forward tips and ideas on how to interact with your Clients on such a project
- ◆ Remember, without Clients doing Engineering Work is just a hobby
- ◆ The business of Engineering therefore demands that we have Clients
  - ◆ Have a Contract in place – PROCSA, CIDB, FIDIC, CESA, NEC
  - ◆ To these Clients we should provide “Absolute Care”
  - ◆ Act with fairness and impartiality
  - ◆ Determine what one is prepared to do “at risk”
  - ◆ Do not move ahead of oneself in the various stages in terms of the deliverables
- ◆ These Clients should ideally have all of the following:
  - ◆ A project with a clearly defined scope
  - ◆ A budget
  - ◆ Timeframes
  - ◆ A willingness to pay

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- ◆ Without a signed Contract you are at risk
- ◆ Your Contract should include the following as a minimum:
  - ◆ The Terms of Agreement
  - ◆ A description of the project brief, scope of work and scope of services
  - ◆ Financial terms
  - ◆ Time frames
- ◆ Fees can take several forms
  - ◆ Lump Sum
  - ◆ Percentage Based
  - ◆ Hourly based
- ◆ Claim for Additional Services as defined in the Contract
  - ◆ Dispute resolution
  - ◆ Time overrun due to Contractor's late or poor performance
  - ◆ Anything not defined in the project brief, Scope of Work or Scope of Services

**If you don't ask, you don't get**

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- ◆ Traditionally Engineers liked to be regarded as the Trusted Advisor
- ◆ In recent years the Construction Industry has been beset with many issues
  - ◆ Loss of experience and/or skills
  - ◆ Turnover of staff in Client bodies
  - ◆ Loss of institutional knowledge
  - ◆ Shortage of budget
  - ◆ Corruption
- ◆ It is no longer enough to be a Trusted Advisor
- ◆ One must strive to be the Trusted “Partner”

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- ◆ Before even thinking about Reports, Designs, Drawings and Procurement Documents the Engineer must put on his Project Management hat
  - ◆ Integration
  - ◆ Scope
  - ◆ Time
  - ◆ Cost
  - ◆ Quality
  - ◆ Human Resources
  - ◆ Communication
  - ◆ Risk
  - ◆ Procurement
  - ◆ Stakeholder Management

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## Best Practice

- ◆ These Project Management functions should be at the back of your mind when drafting up a Professional Services Contract between yourselves and the Client
- ◆ **Integration**
  - ◆ Who is going to make the decisions
  - ◆ Who are the stakeholders
  - ◆ Who will manage JV partners and Co-consultants/Sub-consultants
- ◆ **Scope**
  - ◆ Identify and agree on the scope
  - ◆ Manage the implications of scope creep – time and money

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- ◆ These Project Management functions should be at the back of your mind when drafting up a Professional Services Contract between yourselves and the Client
- ◆ Time
  - ◆ Be honest
  - ◆ Be realistic
  - ◆ Don't plan to fail
- ◆ Cost
  - ◆ Plan the cashflow
  - ◆ Invoice early and then monthly
  - ◆ Qualify your cost estimates – you do not know the market forces
  - ◆ Update budgets regularly

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- ◆ These Project Management functions should be at the back of your mind when drafting up a Professional Services Contract between yourselves and the Client
- ◆ Quality
  - ◆ Define up front what will be fit for purpose
  - ◆ Actively try to manage the Procurement process
  - ◆ Thoroughly review all deliverables
- ◆ Human Resources
  - ◆ Ensure you have an engaged Project Manager
  - ◆ Get the right people on your team so as to meet the deliverables
  - ◆ Mentor and monitor the junior staff



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- ◆ These Project Management functions should be at the back of your mind when drafting up a Professional Services Contract between yourselves and the Client
- ◆ Communication
  - ◆ Write letters – do not rely entirely on emails, messages, WhatsApp and Zoom
  - ◆ Pick up the phone – it solves many miscommunication problems
  - ◆ Take accurate and timeous minutes
  - ◆ It is an advantage to be the secretariat – make that offer
- ◆ Risk
  - ◆ Identify, manage and mitigate risks; decide what risks you will accept
  - ◆ Ensure that a particular risk rests with those who are in the best position to manage it
  - ◆ Mistakes never cancel each other out – they just double up

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- ◆ These Project Management functions should be at the back of your mind when drafting up a Professional Services Contract between yourselves and the Client
- ◆ Procurement
  - ◆ Make sure you have a signed Contract with your Client
  - ◆ Make sure you have Contracts with your JV Partners, Co and Sub- Contractors
  - ◆ Steer the procurement of Contractors to ensure that those who are appointed are capable of completing the Works
  - ◆ Look carefully at the logistics of obtaining the materials you specify
- ◆ Stakeholder Management
  - ◆ Manage your Client and the community who are benefitting
  - ◆ Be aware and ready for the interference of Tendtrepreneurs, Construction Mafia and Business Fora

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- ◆ Push strongly to do the following up front
  - ◆ Geotechnical Investigations
  - ◆ Wayleaves and Servitudes
  - ◆ Land Surveying
  - ◆ Environmental Authorizations
- ◆ Be aware of the following
  - ◆ Clients who are after your Professional Indemnity
  - ◆ Ensure that you get instructions only from those with the delegated authority
  - ◆ Poor designs and/or documentation will lead to disputes and a claim against your PI might follow
  - ◆ Keep careful, detailed records as these may will be required in disputes e.g. Adjudication

**A happy Client is the key for return business**

**‘Your Partner in Enabling  
Consulting Engineering  
Excellence’**