

# Taking care of business

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**Client care is a mandatory competency for building surveying, and Ewan Craig, a speaker at the RICS annual It's Your APC conference, offers guidance**

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Client care should rightly influence all areas of the construction sector, and will be especially evident in building surveying practice. It is integral to good business practice when providing technical services; adopting a winning approach to client care results in a high level of repeat business.

Examples in the technical competencies include the following.

- Building pathology: such as identifying who the client, end user and stakeholders are when dealing with a defect in a housing association dwelling, and how best to manage the relationship with them.
- Conservation and restoration: such as identifying who the client, end users and stakeholders are when dealing with the multistage refurbishment of a heritage property in which several supporting grant bodies and amenity societies are involved.

## The levels

The requirements for this competency by level are as follows.

### At Level 1

Demonstrate knowledge and understanding of the principles and practice of client care, including:

- the concept of identifying all parties who are your clients and the behaviours that are appropriate to establish good relationships with them
- the systems and procedures that are appropriate for managing client care, including complaints
- the requirement to collect data, analyse and define the needs of clients.

### At Level 2

Provide evidence of practical application of the principles and practice of client care in your field.

### At Level 3

Provide evidence of reasoned advice given to clients and others. You should be familiar with the client care issues in your submission documents, and be ready to address questions on them and related matters.

## Questions

Actual questions are based on the candidate's experience, which should be at Level 2 but could exceed this. Two examples are given below.

### **Can you explain your approach to client care at the commencement and during the investigation of damp at housing estate X?**

This question is aimed at Level 2 candidates. The answer should explain pertinent issues to support your application of knowledge.

The client, a large housing association, instructed my practice to investigate dwellings that were each suffering similar damp issues. The practice had carried out similar services previously and a partner was already allocated to look after the client's overall care. I had not worked for this client before and I confirmed with the partner the approach to be taken. I then confirmed with the client their points of contact, preferred lines of communication, priorities and constraints, as well as our scope of services, reporting and deadlines.

The client worked with me to find a strategy to investigate the damp, and reduce potential disruption to residents by initially assessing 3 void properties. I reported the findings to the client and they agreed to further investigation on a larger sample of occupied houses using targeted techniques and non-destructive testing to minimise disruption while gaining data to assess the likely cause.

My final report resulted in work to remedy cavity walls and solid floors defects affecting the estate. I updated the client regularly on progress and cost, by telephone and email, meeting them at planned points and providing reports. I also worked with tenant representatives and with the tenant group so they were aware of the work.

### **Please tell me how you gained feedback on client care in your investigation of the latent defects to building Y.**

This is aimed at Level 2 candidates as well. Your response should show the issues that were considered in applying your knowledge.

My practice has a formal process of interviewing clients and gaining feedback using a standard questionnaire at the end of a project. I interviewed the primary client contact on client care. They were open and candid, giving a useful insight into their perspective on what went well, such as our regular email updates on progress and my interim reports when deadlines had been brought forwards.

They also suggested areas that could be improved, such as a shorter lead time in commencing the project. The questionnaire results were compared with similar projects and clients ? at both team and firm level ? to identify good practice as well as areas to improve. Feedback was given to the client on what we had done to improve our service.

## Care

Given the time constraints of the APC, your answer should be brief but comprehensive. Care should be taken to demonstrate your own skills, abilities and knowledge to the assessors.

Ewan Craig is an APC assessor and Associate with [Ridge and Partners LLP](#)

### **Further information**

- More [details on the APC pathway guide](#) for building surveyors
- This feature is taken from the RICS *Building surveying journal* (March/April 2017)