

# Getting to know you

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## **Ewan Craig, a speaker at RICS' annual It's Your APC conference, discusses the optional competency Analysis of client requirements**

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The Analysis of client requirements on the Building Surveying pathway requires the ability to apply mandatory and technical competencies. These include the following:

- Client care: collecting data and analysing and defining the needs of clients to develop the brief
- Legal/regulatory compliance: awareness of constraints, planning legislation and Building Regulations
- Design economics and cost planning: consideration of designs and cost.

### **The levels**

#### **At Level 1**

Demonstrate knowledge and understanding of the need to collect data and analyse and define the needs of clients.

#### **At Level 2**

Provide evidence of the practical application of that knowledge and understanding; this should include the development of strategies and methodologies and, where appropriate, undertaking feasibility studies, design proposals and costings.

#### **At Level 3**

Provide evidence of developing appropriate strategies to meet the client's requirements with minimum supervision, based on your analysis and interpretation, and demonstrate the ability to report on tailored strategies to them.

Establishing and agreeing the client brief ensures it can serve as the fundamental reference for the service and as a means of measuring success. You should be familiar with Analysis of client requirements, being able, for example, to explain how you prepared data and analysed it, so you can address questions about this based on your submission documents in your assessment interview.

### **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.

#### **Could you explain how you established the client brief at the inception of project E for the private client?**

*This is aimed at Level 2; however, it could be extended to Level 3 if you offer advice to the client on appropriate strategies. The answer would explain pertinent issues to support your*

*application of knowledge.*

This is fundamental at the early stage of any project. My practice assigned me to a private client to extend their home, as the practice's first project with them. My aim was to understand my client's needs and objectives, so I could scope the project and identify the key success criteria.

This was particularly important as the client had little experience of such projects or understanding of the construction sector, so helping them develop their ideas and vision into an agreed document for the service was extremely useful: it helped them understand the project, and helped me to realise their aspirations.

In discussing the client's needs and objectives with them, I focused on their vision, their preferences in terms of functionality and design, their budget and the likely programme.

These were developed into the client brief, which also took account of other aspects such as constraints; I discovered, for instance, that the house was listed and the client was unaware of the need for planning permission, listed building consent or Building Regulations compliance as these affected their programme. I confirmed the brief with the client, and it proved useful in guiding them through the process of designing and constructing their extension.

**Would you please explain how you prepared the outline design proposals for project K for the client?**

*This is aimed at Level 2. The answer would show the issues that were considered in applying your knowledge.*

I already had the client instruction, and had developed the brief for the project to extend an office. The client was experienced in design and construction processes, which meant they had a better understanding of the design ideas and could communicate more clearly with me about them.

I followed my practice's methodology on outline design, considering constraints, budget, the function of the extension and how it linked with the existing space. I prepared several sketches with different layouts and styles; the client was keen to ensure ease of movement and to group teams through the building, so I gained a good understanding of the business, the functional groups and how these interacted in the course of developing the outline designs and space layout. The envelope, structure, services, budget and other aspects were then considered together with aesthetics to complete the designs.

## 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**

## Further information

- Details on the [APC Building surveying pathway](#)
- Related competencies include: [Client care](#) , [Construction technology and environmental services](#) , [Design and specification](#) , [Design economics and cost planning](#) , [Legal/regulatory compliance](#)

- This feature is taken from the [RICS Building surveying journal](#) | (December 2017/January 2018)
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