# CLIENT PROFILE

**Company Name:** ____________________

**Corporation** ☐ **Partnership** ☐ **Sole Proprietor** ☐ **Other** ☐

**Tax ID #:** ____________________

**Client Contact Name:** ____________________

**Street Address:** ____________________

**City:** ____________________ **State:** __________ **Zip Code:** ________

**Telephone:** ____________________ **Facsimile:** ____________________

**Website:** ____________________ **E-Mail:** ____________________

**Send invoices to the attention of:** ____________________

**Project Description:**

____________________

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**What is your ownership in the Property?**

**Similar Project Experience(s):**

____________________

____________________

____________________

**Reference:** ____________________

**Reference:** ____________________

**Reference:** ____________________



**David A. Ericksen**
**Severson & Werson**

## CLIENT INFORMATION CHECKLIST

## QUESTIONS TO ASK OF THE CLIENT DURING PROJECT DEFINITION PHASE

***Determine and Reduce Financial Risk:***

- ☐ Conduct a credit check on the client to determine their ability to pay and their payment history.

- ☐ If a client has no history with us, insist on a significant retainer and then bill against it. When the retainer is exhausted, have the client provide further funds for the retainer.

- ☐ Inquire about the client's payment cycle to determine the best time of the month to submit your invoice. If the client's organization processes bills and writes checks on the 20th of every month, for example, ascertain when the invoice must be submitted to be included in that month's payment cycle.

- ☐ Ask for a retainer on all projects or a payment schedule which includes an arrangement for interest on unpaid bills over 30 days. While many firms insist on a retainer from new clients, few ask for one from existing clients. This is generally seen as a statement of trust and courtesy. However, it does not change the fact that those clients are using your money to finance their project for 60 or 90 days as you wait for payment.

- ☐ Include the specific action steps to be taken in case of nonpayment as a clause in your contract. This should include your option of stopping work on the project.

- ☐ Include the format of your invoice as a topic of discussion during the negotiations. Determine ahead of time the precise information the client wants to have included in the invoice and in what format it should be rendered. Sort out the invoice format before billing begins, not when you are in the midst of attempting to collect an overdue bill. **Attach a sample copy of your invoice format to your contract, initialed by the client, as an Exhibit.**

***Quality Expectations of the Client:***

- ☐ Meet with the client representatives to have a discussion on the levels of quality they are expecting with respect to design, contract documentation and project communication.

- ☐ Sit with the client and determine those things that are realty important to them in the area of quality.

## CLIENT INFORMATION CHECKLIST

- ☐ Ask the client to provide specific examples of project quality that are acceptable **and** unacceptable.
- ☐ Determine with the client how these standards of quality are tied to the construction budget when dealing with the selection of materials and methods.
- ☐ Determine with the client how these standards of quality are tied to the fee budget.
- ☐ Discuss with your client and your team the quality implications for the project process. For example, do the quality standards call for two design alternatives from which the client may choose, or are you expected to simply keep working until the design is "perfect"? Do the quality standards demand that every detail be designed "from scratch", or does the budget only allow for the reuse of standard details?
- ☐ Document the results of your discussions with the client. Provide a summary memo to the client which outlines your understanding of quality for the project and gives specific examples of how those quality levels will be manifested in the deliverables.

***Client Management Plan:***

- ☐ Have a discussion on the unique needs and preferences of both the individuals with whom you will be dealing and the organization within which they work.
- ☐ Identify key preferences, processes and "taboos".
- ☐ Your client's organization likely has very specific processes for communication, review and approval. Ask the client to review these processes and, if possible, to provide any policies or procedures for dealing with vendors in writing.
- ☐ Obtain the names, titles and contact information for all people within the client's organization with whom you will be dealing. Set up a file containing this contact information along with any comments about personal preferences or timing requirements.
- ☐ Have a discussion with the team regarding any unique personality types within the client's organization. Establish a plan addressing how you intend to deal with any distinct personalities, and ensure all team members are informed about specific requirements.
- ☐ Determine the attitude of the client's organization regarding the project itself. Determine answers to questions such as the following:

## CLIENT INFORMATION CHECKLIST

- What has been the general attitude toward the project?
- What risks do you perceive the organization/community is taking with this project?
- Is there strong support for the project in the organization/community?
- Does the project have any particular "patrons" in the organization/ community?
- Does it have any enemies in the organization/community?
- Are there any significant political issues or special interest groups involved with the project?
- How do you feel about our firm's involvement in the project?
- Do you have any concerns about our firm that you would like to address now?

☐ Determine the attitude of the client's organization regarding client gifts, meals, and socializing. Establish a plan for the frequency and nature of client entertainment throughout the course of the project.