

# *A Discussion of the statement 'Dynamic Briefing is the most effective way of exposing client values and capturing client value'*

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## ***Introduction***

The client can be described as the party with the power to initiate a construction project, with requirements that need to be fulfilled. The client and its requirements must first be identified and understood, which will be viewed here as ‘exposing client values’, and the project must then be delivered in a way which best satisfies the clients said values with respect to time, cost and effort, which will be described here as ‘capturing client value’. This distinction between the terms ‘value’ and ‘values’ for the purposes of this research is created in the context of research by Thomson et al. (2003) who described how not only do the sum of individuals’ values frame the subjective assessment of value within the context of a collaborative project, but this value assessment is also objective when comparing the relationship between benefit and expense (time, cost, effort).

In order to discuss the statement ‘Dynamic Briefing is the most effective way of exposing client values and capturing client value’, this paper will look at the implementation of effective briefing as part of a design management strategy, with design management defined as ‘the management and integration of the design process between multiple stakeholders (companies) on a construction project (Thyssen et al. 2010, p.19). A review of the nature of the problem will be undertaken, followed by discussion of the reasoning and limitations of traditional theory. This is then followed by a review of theory surrounding dynamic brief development and its relationship to the title statement.

## ***The client-briefing problem***

Emphasis on the importance of the client in creating a successful project was reflected in an influential report by Latham (1994), which stated that ‘Clients are at the core of the process and their needs must be met by the industry’ (Latham 1994, p.3). The process of identifying and clarifying the client’s requirements is often described as the ‘briefing’ and is of critical importance to the successful delivery of a construction project (Shen et al. 2004; Bowen et al. 1999).

The lack of ability within the UK construction industry to understand the requirements of the client and need for improvement has been emphasised in industry reports such as the ‘Banwell Report’ (Banwell 1964), as well as the previously mentioned ‘Constructing the Team’ (Latham 1994), however the often ineffective briefing process is an enduring problem that many have attempted to solve with little success (Barrett & Stanley 1999). This was described by Smith et al. (1998) as the ‘Client briefing problem’ and defined as ‘the process of deciding upon the content of a client brief for the design and construction of a building’ (J M Smith et al. 1998, p.4).

Limitations of current briefing practice in the UK include inadequate involvement of all the relevant parties to a project; inadequate communication between those who are involved and the inadequate handling of changes in requirements (John Kamara et al. 2002). Research has found that there is little formal education for professionals in briefing and there are no generally accepted procedures (Barrett

& Stanley 1999; Svetoft 2005). Not only can poor briefing lead to increased cost and time for the project, but also long-term inefficiencies for the client due to inadequate buildings that do not meet their requirements, effects on the business success of the design and construction companies and disappointment of the building users. Poor briefing is therefore a problem that concerns all parties to a construction project.

Varied approaches are taken towards implementing the briefing process, however to understand its purpose, below is a list in which Kamara (1999) specified the objectives, or information, commonly included in a completed brief:

- 1) Background, purpose, content and desired outcomes of the project;
- 2) Functions of the intended facility and the relationship between them;
- 3) Cost and time targets;
- 4) Instructions on procurement and organisation of the project;
- 5) Site and environmental conditions, safety, interested third parties and other factors which are likely to influence the design and construction of the facility.

### ***Static Briefing***

The traditional approach towards briefing defines the brief as a separate activity, an entity in itself, that should take place before design starts (Jensen 2011), resulting in a document, set of documents or collection of correspondence material containing the clients requirements (Barrett & Stanley 1999). This approach is driven by the emphasis on the importance of the early stages of development to a projects success (J M Smith et al. 1998; Shen et al. 2004) and the widely acknowledged impact that late changes can have on cost, time and quality, mainly due to the reworking of construction documents and the implementation of additional work. Changes made after the early stages of a construction project are a major source of dispute and litigation worldwide. This has led to a culture that generally views a change order as the failure of a party to fulfil their function in the construction process (Othman et al. 2004).

The static briefing approach emphasises the need for ceasing the development or change of the brief after a critical period. A commonly used process map for construction, the ‘plan of work’ developed by the Royal Institute of British Architects, takes this approach, pushing for the development of an explicit and detailed brief as early as possible in the project. The brief is then frozen at the end of the ‘detailed proposal’ stage and the team is encouraged to work to it as closely as possible (J. M. Smith et al. 1998). Another popular map, the ‘Process Protocol’, developed using a manufacturing industry perspective, encourages the fixing of the brief before the construction phase (Kagioglou et al. 1998). Although it allows development of the brief until a later stage in the process, it can still be considered as leaning towards a static approach.

### ***Dynamic briefing***

There is widespread theory expressing the limitations of the static briefing approach, the majority of which is based upon the inevitability of changes to the brief occurring throughout the project, most significantly after the design has been frozen, after the static briefing stage. This is well described by Nutt (1993) who explained that the traditional (static) brief process is challenged by the nature and

pace of change, that future needs cannot be predicted with confidence and that there is a need for a dynamic process. Extensive research by Othman (2004) supports this theory, with his research identifying 30 unique drivers for development of the brief during later stages, using an extensive sample of case study data. He stated that this should be embraced, with brief development being facilitated to increase client satisfaction, using an approach called ‘dynamic briefing’.

The dynamic briefing approach has been defined in various ways. Jensen (2011) said that briefing as a document is static, and that far from just writing a brief, the briefing should be ‘a process of feedback to, and dialogue with, all stakeholders’ (Jensen 2011, p.2). It has also been defined as ‘the process running through the construction project by which means the clients requirements are progressively captured and translated into effect’ (Barrett & Stanley 1999, pp.4–5). This definition reflects the statement under discussion, in that dynamic briefing can carry out the activities of exposing client values (requirements capture) and capturing value (translating them into effect).

To assess the statement ‘Dynamic Briefing is the most effective way of exposing client values and capturing client value’, the issue of ‘exposing client values’ is first considered. This involves the identification of the needs and requirements of the client, from the level of their mission statement or business outlook, down to their specific needs from the construction project.

Green (2010) offers insight into the use of dynamic briefing to expose client values, drawing from the observation by various sources (Bennett 1985; Goodacre et al. 1982) that extensive collaboration over time is required between the designer and client, as clients are often incapable of producing their own needs and objectives without being probed in depth. Other research also suggests that the designers are experts conducting a facilitated and guided learning process with the clients and users of a project (Jensen 2011). It is also noted by Barrett & Stanley (1999) that designers can easily misinterpret the requirements as expressed by the client, however this can be resolved through continuous follow-up and re-visiting of the issues through prolonged client-designer collaboration. The interpretation of the clients requirements and how it corresponds to their real requirements greatly influences the efficiency of the design (Chatzi 2012). Much of this research supports a dynamic approach, agreeing that a continual process of interaction and collaboration is required for effective briefing.

Barrett & Stanley (1999) offer further insights into how a dynamic briefing approach can be effective in exposing changing client values. Firstly they describe how, as the client’s confidence, knowledge and feel for the issues increase throughout a project, their requirements may change from those first given during the early briefing. If these changes are ignored then the client will inevitably end up dissatisfied with the project, and so a dynamic approach must be used to adapt to these changes throughout the process. They describe how the implementation of these changes in requirements is dependant on continued interaction with the client throughout the process. ‘The briefing process must support the client through this journey from uncertainty to certainty in such a way that aspiration is turned to delight’ (Barrett & Stanley 1999, p.15). Even if the changes in the client’s requirements that Barrett & Stanley suggest do not occur, sustained interaction is likely to ensure the client’s continued satisfaction with the developing scheme and enables them to highlight any potential problem areas before they develop further.

Dynamic briefing may offer an effective way of ‘exposing client values’, but consideration must also be given to its effectiveness in ‘capturing client value’ which, as described previously, represents the use of dynamic briefing to synthesise delivery of the project in a way which best satisfies the clients said values with respect to time, cost and effort.

Aside from the gradually developing exposure of client values, there are a number of other internal and external influences that can cause late development of the brief. Some of these drivers identified as being highly influential by Othman (2004) included meeting new technology changes, incorrect construction documents, materials no longer available, changing of regulations and codes, response to market demand and unforeseen conditions. Othman et al. (2004) described how the dynamic approach to briefing can enable innovative response to these drivers for development of the brief, for the benefit of the project, capturing value to contribute to the achievement of clients expectations. It has been observed that although dynamic briefing presents the potential to capture client value, techniques are required to guide this approach as a design management strategy.

Thyssen et al. (2011) described this process as an on-going value conversation or interpretation and suggested that one way of capturing client value is through the use of Value Management (VM). This would involve maximising the value of the solution from the concept stage through to building use, by auditing decisions against value system based on the client's exposed 'values'.

A system developed by Othman (2004) was developed based on the idea that development of the brief not only offers opportunity to capture value, but also presents a degree of risk. The Value and Risk Management Protocol (VRMP) integrates the value and risk management approaches in order to handle the development of the brief. The protocol provides a system that handles brief development in four stages. Firstly the problem is identified, then structured and pitted against the client's objectives or values. A process of generating, evaluating and selecting the best alternative is then pursued, whereby the value that could be gained is identified, followed by the risks. Continuous revision and auditing of these values and risks is carried out in order to select the best course of action. Finally the alternative is implemented and its execution is monitored and feedback provided to the client, design and construction teams.

The approaches to dynamic briefing described offer a counteractive argument to the view that development of the brief after the early stages of the process is negative. Drawing from a wide variety of research methods and expert insight, the sources present a case that could be seen to support a view given in one working paper that 'conflict is most likely to be productive if handled well; confrontation of ideas can lead to creative solutions' (Ness 2007, p.1).

There are however limitations to the use of dynamic briefing which must be taken into consideration. Feedback from the research by Othman (2004) suggested that if top management lack desire or willingness to use a dynamic briefing management strategy such as the Value and Risk Management Protocol, then its adoption will be limited. Therefore the benefits must be clearly presented to the top management of all parties to gain unanimous support. It is also noted that a dynamic brief approach such as this is time consuming and requires a large volume of information. It is suggested that although this is a disadvantage in an industry where a squeeze on the briefing period already exists, computer software could be used to facilitate input, organising, retrieving, sharing and updating brief development information.

More general limitations are cited by Barrett & Stanley (1999), with regards to the barriers to change. They say that in reality firms are very tentative in taking up change, and that although this may seem irrational at a whole-industry level, it must be respected that they have to judge decisions at a local level. In order to incur widespread change of briefing practise, consensus must be achieved

throughout the system of organisations; otherwise change will be limited to satisfying existing relationships whilst making slow progress towards improvement.

### ***Recommendations***

A key concept to be drawn from this review of literature is the reliance of value capture upon the initial exposure of client values, reflected in the initial theory proposed by Thomson et al. (2003) which identifies how the value assessment framework is based upon the initial client values. This is exemplified by Barrett & Stanley (1999) who claimed that an ‘efficient’ project may be delivered in the presence of ineffective exposure of client values, however the client will remain dissatisfied with the end product.

It is also evident that dynamic briefing offers an opportunity far greater than traditional approaches to effectively expose client values and capture client value, however the recommendation that appropriate techniques and systems must be used to ensure the effectiveness of the approach is particularly important. There are also clear limitations in the form of social and practical barriers to change, which must be addressed.

Some promising new concepts being explored which relate to the dynamic briefing approach include research by Green (2010) which views clients as ‘social systems’, describing construction professionals as researchers who can use metaphors as a method for understanding clients and their needs. Research based on organisational theory such as this provides an interesting angle from which to approach the use of dynamic briefing, potentially offering a means by which the limitations mentioned could be counteracted. Other concepts offer the opportunity to extend the scope of the dynamic briefing approach, such as the feedback framework developed called ‘soft-landings’ (BSRIA & Usable Building Trust 2012) which encourages extended involvement of construction and design teams to enable continuous feedback and improvement.

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