



**CONSTRUCTING
EXCELLENCE**
Midlands

Client Advisor Guide



Introduction

Clients and client advisors occasionally clash. This is unfortunate, because the two need each other and great construction projects benefit from the input of specialist professional advice.

So, we have prepared this *Client Advisor Guide* to define what a client advisor is (so clients know for sure) and how they should behave and operate so that both sides will have a clear expectation of how the relationship can work to everyone's benefit.

Who are client advisors? The scope of professions and services that fit the advisor role

Construction clients are rarely as well informed about the project they have in mind or have already commissioned because they are not part of the construction sector.

They are a customer – at one end of the supply chain. Hence they need advice. That advice often comes from the 'professions' within construction – but not exclusively. The obvious example of a client advisor is an architect.

But equally, depending on the type of project or the phase of the work, advice should be sought from any of the following:

- > Architects
- > Legal teams
- > Insurance experts
- > Quantity surveyors
- > Engineers – structural, electrical and mechanical, civil or highways and other specialist areas
- > Planners and planning consultants
- > Project managers and ESG consultants

Likewise, the actual construction team will need specific advice – delivered at the appropriate level, at the right time and often very specialist in nature. This could cover all of the above, plus areas such as wellbeing, waste management, logistics, active travel and decarbonisation.

There will be cross over in all of these areas and ideally, a client will seek guidance from a lead client advisor to provide an overview.



What skills / behaviours are required?

Leadership is a core skill, because to ensure best practice is followed an effective client advisor must be prepared to challenge the client.

What skills and behaviours fit best depend on the nature of the client, the project and the status of the job – as some advisors will have a role at varying stages of the scheme. The right skills and behaviours will need to match the imperatives and policy drivers of a scheme.

Some key skills and behaviours might be as follows:

- > Leadership
- > Independence – an ability to challenge the client
- > Principles – acting morally and ethically with a view to the sustainability of a project and wellbeing of its team
- > Commitment to *Rethinking Construction* values
- > Stakeholder engagement skills
- > Knowledge of supply chain management
- > Experience of contracts, models and early engagement
- > Net zero and decarbonisation
- > Experience of procurement approaches, contracts and early engagement
- > Quality
- > Health and safety
- > Compliance generally
- > Design skills
- > Engineering
- > Feasibility and planning
- > Finance – funding and commercial awareness

What's expected of an advisor?

Exactly what it says on the tin – provide timely, insightful professional advice based on their area of expertise. The role is similar to that of an expert witness in a court of law. It is likely that a client will not have the necessary skills and knowledge in-house – hence client advisors bridge the gap between their business objectives and project objectives.

However, it is important that a client advisor does not act like a surrogate client – ultimate responsibility and risk rests with the client.

At times, a client advisor might act as a project manager, but the role is also comparable to a non-executive role acting as a mentor to the client. There has to be a degree of flexibility depending on the client, the specific area of expertise of the advisor and the project. An advisor must remain independent and objective.



At what point do you join a project / scheme?

At the beginning of the beginning.

Ideally, a client advisor will be appointed at the very outset of a project or scheme, i.e. when the client foresees the requirement for a new building, or refurbishment of an existing one, or the need for new or upgrading of infrastructure. An advisor will be able to challenge the 'need,' recommend alternate ideas, and refine the policy that is agreed.

At the start of the works is not too late to join a project, but it will be difficult to change plans and designs that might look unwise, or not in line with best practice.

It is important that the appropriate advisor and the right professional advice is given throughout a project depending on the stages it reaches.

For best practice to be pursued and value to be driven right through a project, a client advisor needs to be part of, or lead, a development team that defines what the project will be at the outset. This will cover off feasibility, design, all engineering aspects and advice on performance, procurement and delivery and cover funding too.



How long do you stay with a scheme?

We recommend that the lead project advisor – that individual acting as the independent, objective voice of reason – stays with the development team from the conceptual stage of the project right through to its completion. The role and input required might ebb and flow depending on the progress of the job, but they should be available and on call from the beginning to the handover of the scheme and potentially available for advice beyond the handover as part of a 'soft landing' process to help the occupier or end user understand the facility they have begun to use.

It is, however, up to a client to determine if they remain with their original advisor or move from one specialist expert to another as the contract and works move through their phases.

A construction project is a journey. It requires a holistic development-wide perspective. Hence we recommend a lead advisor to stay with a project, like a pilot guiding a ship into port.

For more information contact us at:
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Advising advisors: best practice guidance

A great starting point for establishing a context for a project based on its goals, priorities and values is the *Value Toolkit*. Read this alongside the CE Midlands' *Outcome Led Procurement Guide*. It provides an overarching agenda for discussions between the client and an advisor focusing value, desired outcomes, assessment of risk, behaviours and learning from previous projects. The *Value Toolkit* adds substance and detail to enable you to play the role of advisor as best as possible.

If you need to champion the role of the client advisor, we suggest you reference *Accelerating Change*. In his report from 2002, Egan sets out the case for client advisors.

Another valuable resource is CE South West's *Enlightened Client's Journey to Project Quality and Compliance* which aims to capture what enlightened clients do to achieve an exemplary standard of quality and compliance.



Alongside these three suggestions we recommend you reference the following:

- > The Government's *Construction Playbook* is a must have.
- > For generic 'building' advice use the CIOB's *Code of Practice for Project Management for the Built Environment*. It starts at £52.99, with a 20% discount for CIOB members.
- > The principles in the *RIBA Stages and Guide to Work*, whilst focussing on the role of the architect as an advisor, can be applied by many of the professions offering advice and support during the construction process. We suggest [this link is useful for all advisors](#).
- > Across the CE Midlands web site there is a wealth of advice and information. The best starting point is our [CE Midlands Resource Archive](#).

Use the link and explore the reports, guides and case studies available and choose the appropriate example for you.

