Challenges Facing Commissioning Firms and Strategies to Overcome Them

Mark Warren, CCP, LEED AP, WSP

21st National Conference on Building Commissioning
AIA Quality Assurance

The Building Commissioning Association is a Registered Provider with The American Institute of Architects Continuing Education Systems (AIA/CES). Credit(s) earned on completion of this program will be reported to AIA/CES for AIA members. Certificates of Completion for both AIA members and non-AIA members are available upon request.

This program is registered with AIA/CES for continuing professional education. As such, it does not include content that may be deemed or construed to be an approval or endorsement by the AIA of any material of construction or any method or manner of handling, using, distributing, or dealing in any material or product.

Questions related to specific materials, methods, and services will be addressed at the conclusion of this presentation.
The presentation is geared to highlight the challenges facing Commissioning Providers and how to overcome these challenges to thrive in an increasingly competitive industry.

The challenges include:

- Development/Training of Staff
- Fee Pressure
- Clarity of the services provided
- Managing staff Nationally (internationally)
- Efficient Delivery of Services (Data collection)
- Integration into BIM
- Quality
Learning Objectives

At the end of this session, participants will be able to:

1. Identify Components of a Commissioning Business Plan
2. Implement Techniques Used to Manage the Commissioning Business
3. Identify Common Challenges & Solutions
4. Anticipate Potential Roadblocks
Introduction

- What is the Strategy of the Cx Business? (MEP Firm, Independent Cx Firm, Contractor, TAB)
- Growth Strategy (By Geography, By Facility Type, Services Provided)

WSP

- Buildings
- Transportation & Infrastructure
- Environmental
STRATEGIC PLAN/BUSINESS PLAN

Business Plan (You need one)
- Financial Analysis (5 year)
- Revenue Projection - Staffing Plan
- Competitive Analysis
- SWOT
- Business Development Plan and Marketing Plan
- Stretch Goals – Acquisition or Geographic

Why?
- Staff Retention
- Consistent Delivery
- Consistent Message
OUTCOME OF BUSINESS PLAN
Financial Goals, Staffing Plan, Realistic Assessment of the Firm

Internal
► Business Processes
► Individual Career Development Plans
► Message to Upper Management
► Business Goals
► Client Care Program

External
► Branding
► Consistent Messaging
► Standardized Operations

Roadmap to Success
CHALLENGES

► Development of Staff
► Fee Pressure
► Clarity of Scope
► Management of Staff (Multiple Offices)
► Efficient Delivery of Services
► Continual New Entrants
► Quality of Services
DEVELOPMENT/RETENTION OF STAFF

Challenges

- Salary Pressure
- Competition
- Career Advancement
- Internal Organization
- Client Care Focus

Strategies

- Quarterly Reviews
- Job Descriptions /Salary Grades
- Job Titles
- Organization Structure
- Client Care Program

21st NCBC Conference
FEE PRESSURE

Challenges
- Win Prospects
- Maintain Quality
- Establish Client Expectations
- Differentiate the Firm

Strategies
- Clarify/Quantify Scope
- Break Out Tasks
- Highlight Qualifications
- Sample Work/Online
CLARITY OF SCOPE

Challenges
- Code Requirements
- LEED
- Systems to be Commissioned
- On-site Presence
- Enhanced CA?

Strategies
- Provide On-site Weekly Rate
- Quantify Meetings
- Quantify Site Visits
- Provide Features & Benefits?

21st NCBC Conference
MANAGEMENT OF STAFF

Challenges
- “Island Effect”
- Shared Services/Staff
- Consistent Deliverables

Strategies
- “Commissioning Summit”
- Weekly Interaction
- Web Based Standards
- Support from All Offices
EFFICIENT DELIVERY

Challenges

- Keeping up with Competitors

Strategies

- Handheld Devices
- Software Tools
- “Smart” Forms
COMPETITION

Marketing Plan Activities

- Elevator Speech
- Qualifications
- Email Notifications
- White Papers
- Publish or Perish
QUALITY OF SERVICES

Challenges

- Inconsistent Service Delivery
- Unfamiliar Documentation

Strategies

- Standards
- Internal Project Audits
- ISO Audits Firm-wide
- Training Program

ISO 9001 Registered Company

21st NCBC Conference
FUTURE CHALLENGES

► BIM Integration
► Formidable Competitors
► National Players
► Expanded Scope (Building Envelope, etc.)
► Streamlined Data Acquisition
► Expanded Skill Set of Staff
► “Generalists” vs. “Specialists"
STRATEGIES (ANNUAL BUSINESS PLAN)

► Quality of Deliverables
► Training Curriculum within the Firm
► Standards
► Certifications of Staff Members
► Branding
► Business Development Program
THANK YOU

Mark Warren, CCP, LEED AP
Mark.Warren@wspfk.com