

DESIGN FIRM MANAGEMENT & ADMINISTRATION REPORT



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PROFESSIONAL PRACTICE

10 Steps to Ensure Productive Meetings When Using BIM

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The use of building information modeling (BIM) is rapidly increasing. BIM tends to put the focus of meetings mostly on technology – with the “wow factor” taking the center stage. Another change is occurring simultaneously, but nearly invisibly: a change in meeting formats and person-to-person interactions. Eclipsed in the darkened room by the images on the lighted screen, the human factor in meetings is getting lost. Yet, for optimal decision-making, team collaboration, and client relationships, that human connection is still the key to meaningful communication, relationship building, and successful projects.

We need to maintain the client relationship and keep it invigorated. To ensure decision-making is a process where people provide input, discuss,

then reach collaborative decisions, we need to adopt forward-looking communications skills. We especially need to use them in design meetings in which BIM is the key tool. For the team as well as the client, owner, and stakeholders, it’s about blending the technology with best practices for communications and the human touch!

Since decision-making depends upon clear information and active exchange of ideas, it’s important to have a meeting structure where everyone is on the same page and a free exchange of ideas is encouraged. Design meetings that involve a digital model and advanced technologies need a new, well-focused format that balances the use of technology with person-to-person communications – where no person is left behind. Meetings ideally should be structured with the model in the middle.

Professional Practice

Dealing with new technology requires new meeting formats to ensure optimal participation and decision-making. Be sure to adopt the 10 steps when running meetings that include virtual modeling.

Ten steps for BIM design-decision meetings.

A special meeting structure is especially useful when a good number of team members are participating in the meeting, when colleagues who are not regularly working on this project attend the meeting, when the client or owner is present, or when other stakeholders are in the room.

1. *Start by stating the meeting purpose and goal, then pose an overall focus question.* While typical meetings have a stated purpose and goal, the new element for productive BIM-centered meetings is the *focus question*. To be sure all participants are on the same page, even the technology-shy, it is helpful to formulate and then state an opening question that establishes the meeting's primary task. The best type of question is one that encourages discussion (not yes or no) so a free exchange of ideas ensues.

Here's an example of a meeting opening statement: "The purpose of our meeting this week is to look at the placement of steel beams in relation to the placement of air ducts. To focus our discussion, the question we are addressing is: How can we best place the air conditioning ducts in the narrow, tight passageway without incurring extra costs?" Note that this focus question makes the objective clear in laypeople's terms.

You might want to create a focus question for each segment of the meeting, each topic you will address, or each agenda item.

2. *Agree on how decisions will be made.* Decide at this point what method will be used to make the decision that day. If you have three meeting participants or more, it is important to head off conflicts by establishing the method before beginning the discussion. Will it be a simple majority vote? Two thirds majority? Open discussion with the project manager alone making the final decision? Consensus (where everyone agrees with the decision)?
3. *Establish a common vocabulary.* The world of BIM has its own lingo, and until it is standardized, each firm or project team is creating its own phrasing as it goes along. Phrases and descriptors are being invented to explain what the technology makes possible. Certain terms and sentences did not even exist two years ago, and might not make

sense to anyone not connected to the particular project. Members of an A/E firm in Cambridge, Mass. reported to me that they find themselves making up wording as the project progresses. Their most frequently asked new question is: “Did you clash the structural and mechanical models yet this week?”

Therefore your team or firm is well-advised to create and distribute your own glossary of terms so that you can build a common vocabulary. This document should grow as the project advances.

4. *Share progress-report-to-date information.* This can be done conversationally in small groups or in one large group, using traditional paper as well as media technology – but not the BIM model.
5. *Confirm understanding.* It’s important to make sure each decision-maker can paraphrase the issue and the project’s progress. This is best done in conversation, with question-and – answer exchange facilitated by the project manager or principal. The BIM master plays a support role during this discussion.
6. *Explore options first in conversation, and then introduce the model.* The preceding steps allow time to create rapport, chemistry, and understanding. By introducing BIM at this point, meeting participants are psyched to see the images, have a frame of reference for

what they are about to see, understand how today’s decisions fit into the whole, and can productively explore options. The model can now be the focal point in the middle of the meeting.

If the image is animated, have the key designer or BIM master explain what the group is about to see and what element(s) to look for before viewing it. Then play the animation. It’s helpful not to talk over the animation so viewers can concentrate best without being distracted by ongoing narration.

7. *Reach a decision on how to proceed or agreement on what works.* After a thorough discussion of the model (which may be lively or heated!), you will be glad you have the decision making method firmly in place, which you did in Step 2.
8. *Confirm understanding.* Never assume anything! This step is vital to keep expectations in line with scope, capabilities, budget, and processes. Confirm in face-to-face conversation with the *lights on* as well as on paper or in meeting minutes: the issue, decision or solution, and any follow-up actions.
9. *Update the model.* Make changes to the model in the room and, depending on the level of BIM you are using, to the central model, the sub consultants’ models, and any other iterations of the model.

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10. *Establish the next steps.* Agree on what changes will be expected for review at the next meeting and how technology-driven edits will flow between parties in the interim. Agree on the decisions that will be needed and set up the next meeting.

A meeting in which the BIM image dominates the room and steals attention must not take precedence over valuable interchanges among meeting participants. Because the model is only a technology tool, using BIM requires that *you* make a conscious effort to create a meeting environment that encourages full and effective communication. Well-reasoned decision-making is aided by a clear process for information exchange.

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Upcoming in future issues:

- “Beware of Certain Contract Issues When Doing International Work “
- “The Business Case for Diversity”
- “Evidence-Based Design”
- “Top Five Legal Issues With BIM”
- “Avoid Common Marketing Mistakes”
- “The Need to Over communicate With Clients”

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