

• WEEK 4 • LIVE SESSION

Pursuit, Contracting and Project Startup

“The gap between handoff from PIC and kickoff with the design team is full of critical information, which the PM may not be aware of.”

92%

Pursuit condition changed
after signing.

76%

Reading the Performance,
Experience, and
Financial target.

56%

What belongs on one client call.

Now let's look at exactly how you each answered.

A county courthouse renovation Grace signed eleven months ago. The Go/No-Go form said the firm pursued it because a court specialist for that jurisdiction would lead the design. That person left Grace in April. Everything else checks out, the fee still works, your PIC seems comfortable. What's your first move?

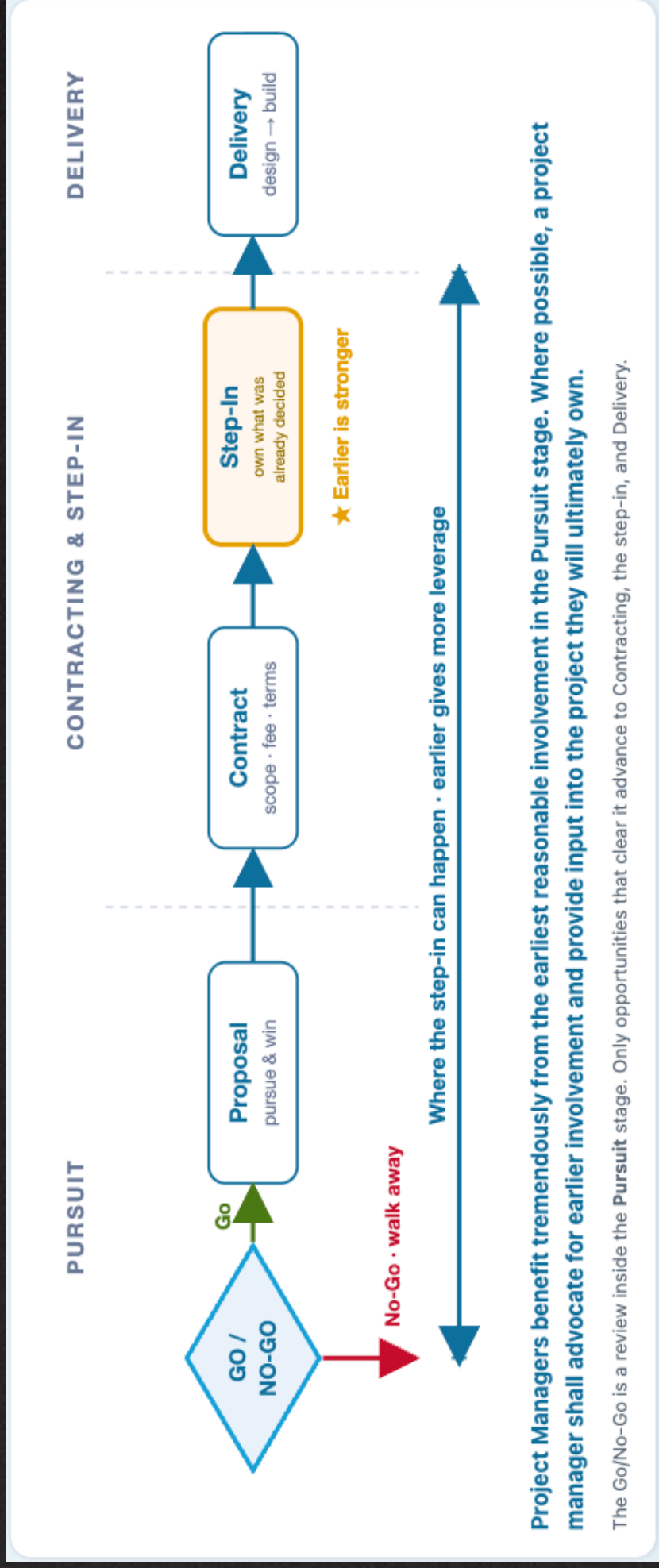
- 1 Nothing yet. Firm leadership approved this and the fee still holds, so start planning and raise it if the schedule slips.
- 2 Reopen the pursuit decision with your PIC and ask whether Grace should have taken this project at all.
- 3 Go to your PIC now. The condition that made this a Go no longer exists, so name it and ask what replaces it before you build the plan.
- 4 Ask the client whether losing the specialist changes their expectations.

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- | | | |
|---|--|-----|
| 1 | Nothing yet. Firm leadership approved this and the fee still holds, so start planning and raise it if the schedule slips. | 4% |
| 2 | Reopen the pursuit decision with your PIC and ask whether Grace should have taken this project at all. | 0% |
| 3 | Go to your PIC now. The condition that made this a Go no longer exists, so name it and ask what replaces it before you build the plan. | 92% |
| 4 | Ask the client whether losing the specialist changes their expectations. | 4% |

Ninety two percent of you already know to do this. When a Go condition disappears, you go to your PIC first.

Two of you asked how PMs get pulled into Go/No-Go earlier.



Three weeks into a community college science building. Your open question list has four items: whether the geotechnical report was ever delivered, whether the budget's fifteen percent contingency assumed the owner supplies lab casework, what the Dean will consider a successful project, and whether the campus can lose lab access during summer term. You have one forty-five minute call with the owner's rep Thursday. What belongs on that call?

1 All four. She's the client, and one call is the efficient way to clear the list.

2 The two only she can answer, her definition of success and the summer lab access constraint. The other two have owners inside Grace and get confirmed there first.

3 Only her definition of success. The other three are design team logistics.

4 None of them. Confirm everything internally first, then bring the Dean a complete picture.

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1	All four. She's the client, and one call is the efficient way to clear the list.	28%
2	The two only she can answer, her definition of success and the summer lab access constraint. The other two have owners inside Grace and get confirmed there first. MOST POPULAR	56%
3	Only her definition of success. The other three are design team logistics. LEAST POPULAR	4%
4	None of them. Confirm everything internally first, then bring the Dean a complete picture.	12%

A regional water utility operations center. In your first real conversation, the utility director tells you two things. One, the SCADA control room has to stay live with no monitoring gap the day crews move in. Two, she presents to the utility board every other month and won't walk into that room with news she hasn't already heard from you first. Grace's fee build and project budget already set the fee and planned profit. How do you read what she gave you?

1

The control room requirement is the real target. The board comment is a personal preference and doesn't change the plan.

2

Both are Experience. She's describing how she wants to feel about working with Grace.

3

The control room is the Performance target, the board rhythm is the Experience target, and both impact the plan. The financial target came from the fee build and the budget, so it isn't hers to define.

4

Take both to your PIC to confirm, since Performance and Experience targets are set inside the firm.

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| 1 | The control room requirement is the real target. The board comment is a personal preference and doesn't change the plan. | 4% |
| 2 | Both are Experience. She's describing how she wants to feel about working with Grace. | 4% |
| 3 | The control room is the Performance target, the board rhythm is the Experience target, and both impact the plan. The financial target came from the fee build and the budget, so it isn't hers to define. | 76% |
| 4 | Take both to your PIC to confirm, since Performance and Experience targets are set inside the firm. | 16% |

The client just handed you two real targets. Only Grace could tell you the third.

“You don’t know what you don’t know. It comes with experience. How can Grace support new project managers and help them know what to ask upfront?”

“How to build curiosity and how to know what questions are still needing answers.”

“Does anyone have a form or checklist to best implement the project background information required to build the plan?”

The Familiarity Checklist

Module 4b, Card 3. Every gap has an owner, ask this first, is the answer recoverable from the record, or does it only exist with the client.

CONFIRM IT, PULL IT FROM THE RECORD

Signed agreement — scope, fee, terms

Proposal / pursuit file — what was sold and how

Fee basis and staffing assumptions — what the price depends on

Schedule and milestone commitments — the dates you now own

DISCOVER IT, ONLY THE CLIENT HAS IT

Verbal promises made in pursuit, never written down — confirm with the PIC first

The client's real priorities and definition of success

Where the margin sits, the fee's soft spots

Relationships and context, who matters and why

“Getting information out of the PLC is important, though you make it sound easier than it sometimes is.”

—
This is the fastest information gap in the whole process. Now, we close it.

Getting a Straight Answer

Grace's own people already have a name for this. Two of you called it *the download*, in two different answers.

Ask for the debrief before you open the file, not after, so you aren't defending assumptions you haven't tested.

Ask why, not just what. The file already shows what happened, only the PIC can explain why.

Bring one specific unknown, not a general "walk me through it." Specific gets a faster answer than open-ended.

Name a decision, not a download. "I need fifteen minutes on this one item" gets time on the calendar faster than "can we catch up."

Close the loop in writing the same day. Send back what you heard, so nothing has to be re-asked later.

Today isn't about pretending information is always available. It's about deciding what to do when it isn't.

What do you need to know before your first client call?

01

02

03

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What do you need to know before your first client call?

Confirm means the answer already exists, in the record or with your Principal. Discover means only the client can tell you.

01	Why did Grace pursue this project in the first place?	06	What has already been decided that I have to honor?
02	What did our fee assume, and who supplies what?	07	What will the client consider a successful project?
03	What has to be signed off, and by whom, before design work starts?	08	What does your client contact personally care about most?
04	Is there anything already unresolved or flagged in the file?	09	What can the client's operation not live without during construction?
05	Where is the tightest point in the real schedule?	10	How does the client want to hear from us, and how often?

“What do I do when a PIC brings a project in through a personal connection and there is no record and a six week delivery timeline?”

NO RECORD MEANS

- | No Marketing Folder.
- | No proposal notes.
- | No capture plan.

“My marketing folder is empty.”

What do you need to know before your first client call?

01 Why did Grace pursue this project in the first place?

CONFIRM

02 What did our fee assume, and who supplies what?

CONFIRM

03 What has to be signed off, and by whom, before design work starts?

CONFIRM

04 Is there anything already unresolved or flagged in the file?

CONFIRM

05 Where is the tightest point in the real schedule?

CONFIRM

06 What has already been decided that I have to honor?

CONFIRM

07 What will the client consider a successful project?

DISCOVER

08 What does your client contact personally care about most?

DISCOVER

09 What can the client's operation not live without during construction?

DISCOVER

10 How does the client want to hear from us, and how often?

DISCOVER

Top 10 Discovery Questions Every PM Should Answer Before Kickoff

Six you confirm before the call. Four you ask on it.

01 Why did Grace pursue this project in the first place?

CONFIRM

06 What has already been decided that I have to honor?

CONFIRM

02 What did our fee assume, and who supplies what?

CONFIRM

07 What will the client consider a successful project?

DISCOVER

03 What has to be signed off, and by whom, before design work starts?

CONFIRM

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DISCOVER

04 Is there anything already unresolved or flagged in the file?

CONFIRM

09 What can the client's operation not live without during construction?

DISCOVER

05 Where is the tightest point in the real schedule?

CONFIRM

10 How does the client want to hear from us, and how often?

DISCOVER

"The unwritten piece of the project is just as important as the written piece, and must be chased, evaluated, and discussed to leave minimum to no unknowns."

“Chase the unknowns to take more ownership.”

Tomorrow morning, I will confirm ____
before I ask my client about ____.

TOMORROW

No new content.

NEXT LIVE EVENT

The first BST11 technical session, led by Nick Newman, in our usual Thursday slot.

**THE FOLLOWING
WEEK**

Our regular cadence returns with Module 5.