

FOR FELICIA

Sine qua non

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# Writing for Design Professionals

A Guide to Writing Successful Proposals,  
Letters, Brochures, Portfolios, Reports,  
Presentations, and Job Applications for  
Architects, Engineers, and Interior Designers

STEPHEN A. KLIMENT



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# Project Writing

# 6

Marketing writing seeks to persuade the recipient to grant you a wish. Project-related writing, the subject of this chapter, has a very different purpose. Also known as informational writing, it is designed to give information or to unravel a situation connected with a project or your firm. It is the most common form of writing by design professionals.

Project writing consists of the following types:

Correspondence

Planning, feasibility, research, and other reports for clients

Investigative reports sponsored by your firm

Internal newsletters or house organs

Obituaries

Clear project correspondence is the grease that runs the machinery of professional projects, smoothly functioning teams, and happy clients.

Some examples and themes of correspondence writing are:

Correspondence

## *Letters*

Project manager to client (notify concerning change in choice of facing material; schedule a meeting; schedule site visit by client's CEO; review impact of strike by electricians' union; introduce punch list; notify concerning changorder requiring budget adjustment; advise on options for ordering and installing high-school educational computer system)

Partner to residential client (discuss living room furniture options)

Consultant to prime professional (review impact of floods on landscaping plan; identify discrepancies between structural and mechanical systems' space requirements; list problems encountered by acoustical, lighting consultants)

Partner to head of citizen review committee (schedule public informational meeting of citizens)

Project manager to consultant (discuss lateness of drawings; explain pending changes in seismic code; demand environmental impact statement)

Office business partner to vendor (letter to legal counsel, accountant, insurance representative, rental agent; order computer software, hardware, office supplies)

- Specification writer to supplier (request to send rep with stone samples; request for added performance data on new product)
- Project manager to general contractor (alert over community complaints about site noise; ask why delay in preordering steel frame; confirm schedule adjustments)
- Project manager to team (meeting minutes)

#### *In-house memoranda*

- Managing partner to staff (vacation schedule; significant new commission; new bonus plan; opening of new branch office; promotion)
- Project manager to partner (send cover note accompanying weekly status report; forward, with comment, letter received from client)

#### *Social correspondence*

- Partner to client (invite to share box at Camden Yards stadium; send “thank you” note for successful fishing excursion or dinner invitation)

For letter writing to be effective, it must be geared to the recipient’s need to know; adjusted to the recipient’s ability to understand it; of a length consistent with the nature of the message; clear; and able to get to the point quickly, then stop.

The informational letter has some things in common with the marketing letter (chapter 2), especially in the matter of formatting the name, address, and salutation, and getting to the point. It differs in the matter of intent, which is to convey information, often followed by a recommendation; in contrast, the marketing letter is a solicitation for work, or a request.

To shape the informational letter, use this format:

- Recipient’s name and address (see chapter 2).
- Salutation (see chapter 2).
- Opening. State what you are writing about and why it’s important.
- Core content. Describe the issue—whether you are dealing with latent community opposition to a neighborhood construction project; a consultant’s lateness in supplying drawings; a need to review brick samples due to a change in design; or attaching your comments to minutes of the last job meeting with the client’s facilities manager. To make this material jump smartly off the page, consider bulleting your key points.
- Decision and marching orders. End by pinpointing what the recipient has to do as a result of the situation you have just described, and by when; what you and your firm must do; what is up to third parties, and who is to notify them.
- Brief summary.
- Closing. End on an upbeat note, with a cordial greeting or a cool *adiós* (as warranted); propose the next contact date; and sign off.
- cc/bcc. Whom to favor with copies of your message can be a subtle game of politics. It’s a way of enlisting a person’s support, for instance, without actually requesting it. Indeed, the identity of those on the copied lists may

be more significant than the original recipient. Shrewd, politically savvy writers play this game with great aplomb. Some take it a step further: in addition to typing “cc” at the end of the letter and listing the names of those copied, they send so-called blind copies, or “bcc.” A bcc goes to individuals you want to see the letter *without the knowledge* of the original receiver.

#### *Scenario*

You are one of two partners in Gómez and Abernathy, a ten-person architecture and town design firm. You have been hired to renovate a two-block deteriorating area at the eastern edge of downtown Cleveland. Your plan calls for tearing down some dilapidated five-story walk-ups that are still 50 percent occupied and replacing some of the units with infill housing, building a small clinic, and using some of the new and existing vacant lot space for an outdoor neighborhood gathering area to include benches, plantings, a small playground, and a fountain. The project is now in design development. Due to faulty communications, the community has not been kept abreast of the plan. While most of the area’s citizens hope the project will improve the quality of life, there is much uneasiness about the final outcome of the scheme, and a strong anti-faction is emerging.

You decide to approach William Patterson, chairman of a local citizens’ group, about convening a town meeting at which you will present the plan and answer questions. You write a letter to Mr. Patterson explaining your idea for such a meeting, and suggesting a site, format, agenda, and proposed participation. You plan to follow up with a phone call.

#### *Letter*

Mr. William Patterson  
Chairman  
East Downtown Cleveland Citizens Committee  
800D Euclid Avenue  
Cleveland, OH 44100

Dear Mr. Patterson:

The Cleveland 2000 project for which our firm is the architect and town designer is now in design development. We are confident that, when completed 18 months from now, it will make for a happier, prouder community, preserving what is fine, removing what is crumbling, and adding much that is good, including new housing.

We sense that most of the citizens hope the plan will be for the best. Our project manager and staff have, however, noted a good deal of doubt and uneasiness about the final outcome of the scheme, and a strong anti-faction is emerging.

I am writing to enlist your help. I know that much of the apprehension arose because the community doesn’t know enough about the project and

the impact on its people. I accordingly suggest, with your support, that we convene a town meeting at which to describe the plan. Citizens will be encouraged to ask questions and share their concerns.

To recap the salient features of the plan, the community gains a net of 48 housing units, a small clinic, and an informal gathering place including benches, plantings, a small playground, and a fountain. It will lose 8 dilapidated five-story walk-ups and two trash-filled empty lots. The mayor has approved safe, clean, affordable temporary housing for the families displaced by the construction.

We will be very grateful if you could contact the community's leaders and discuss a place and time for the meeting, avoiding weekday daytime so working people can attend without missing work. Meanwhile, we will begin to prepare a visual display and demonstration that will clearly explain the scheme. We'll also alert those of our consultants who should be present. I will follow up with you this coming Tuesday.

This is a worthy project that will benefit all concerned. We hope that with your help and the right communications, we will reverse the current anxiety, and the community will give the plan the support it deserves.

With best regards,  
Henry Gómez, Partner  
Gómez and Abernathy  
Architects and town designers

cc: J. J. Smith, chairwoman, Cleveland Housing Agency  
Amelia DeFiore, president, Ohio Community Foundation  
Herb Green, landscape architect  
bcc: Thornton Lee, mayor of Cleveland

### *Scenario*

On another project, your firm, Gómez and Abernathy, is in the awkward position of watching, as it proceeds with design development on a new elementary school, the estimates rising uncomfortably above the client's budget. You had warned the client earlier that the scope was too ambitious for the budget, but the client insisted on moving forward. You have now reached the point where you feel you must share the brutal truth with the client.

### *Letter*

Ms. Ivana Kopecky  
Facilities Officer  
Sandusky School District  
1 Acacia Street  
Sandusky, OH 44870  
Subject: Garfield Elementary School

Dear Ms. Kopecky:

I must tell you that estimates for Garfield Elementary School continue to come in well above your budget for the school. We have worked hard to find ways to bring the costs down. We have explored alternative materials for the exterior wall facing, for the lighting system, for the classroom furnishings, for the cafeteria and gymnasium finishes, along with additional avenues to save on costs. This effort was successful in reducing construction costs to a degree, but we have now pared those costs to a point where any added substitutions would bring the school's quality below the standard you would want.

The only option that remains to us now is to reduce the scope of the project, a condition we alerted you to in our earliest discussions. We now recommend that you agree to revise the scope of the work as follows:

- eliminate two classrooms and one administrative office
- reduce the areas of the remaining offices by 15 percent
- erect only the shell of the fitness center, for eventual completion as funds become available
- eliminate all but basic food preparation; instead, bring in meals from outside
- postpone landscaping except for paving and seeding

While not an ideal solution, we feel that these measures will bring your school in on budget. More, it will bestow on your district a school that provides a stimulating setting for learning as well as a notable new landmark in its neighborhood.

To review this situation in greater detail, I suggest that Jerry Smith and I meet with you at your office as soon as convenient. Please call me about a date and time.

With kind regards,  
Victor Abernathy, Partner  
Gómez and Abernathy

cc: J. Smith, project manager

This letter is courteous, detached, and raises the issue of an earlier warning over the scope-versus-cost issue, without rubbing it in. It shows effort on the architect's part to reduce costs, but holds out for quality.

The in-house memorandum, or memo, differs from standard correspondence mainly in the compactness of its content and form. It is the vehicle commonly used for managing projects in-house and for conducting the firm's internal business such as business planning, accounts, human resources management, marketing preparation, and links with branch offices.

The memo should include the heading box and the substance. Include names of the receiver, sender, and those to be copied; the date; the topic; and a file name or number. Many firms arrange these data in a standard electronic format with preset tabs. You merely fill in the information. When developing the substance of the memo, largely follow the format for letters: what the issue is; why it's important; who is being tapped to deal with it, and when. Organize this material in short paragraphs, identified by numerals or bullets.

This type of memorandum is also suited for dissemination on the intranet, if your firm has one (see discussion of the intranet in "Not on Paper Alone," below). For an example of a concise internal memo, read the following.

#### *Scenario*

Your firm, Knudsen, Carlson, and Knudsen has just learned of a new commission won after strenuous effort. As the managing partner, you decide to let the staff know, hand out the bouquets, and make assignments.

#### *Memo*

DATE: 9 June 1997  
TO: All staff  
FROM: Bob Knudsen  
SUBJECT: New project  
FILE: KCK-RLK200

#### FOLKS:

Good news! I just learned that the Magruder Art Foundation has chosen Knudsen, Carlson, and Knudsen to design the building, interiors, signing graphics, and landscaping for MAF's 80,000 sq. ft. art museum near Little Rock, Arkansas. Congratulations to Marilyn DiPaglia and her business development team for this success.

- We have designated the team to shepherd this project. John Coelho will be project manager, Priscilla Davies will be architectural design leader, Capability Jones is landscape designer, and Kevin Leung will take the technicals and computer support lead, with myself as partner-in-charge. We'll meet in conference room 2 this Monday at 9 A.M. to kick off the process.

- Our consultants will be: Tension Associates (structural); Bernoulli Engineers (mechanical, electrical, plumbing); Matt Sabin & Associates (acoustical); and Lumen Associates (lighting). We'll meet at a time to be determined at our Monday meeting.

- As is our practice, the team will establish itself as a working group, this time at the northern corner of the main drafting room. Willie Kelly [office manager] will have workstations rearranged in the next two weeks.

- Marilyn DiPaglia will arrange ASAP to issue a one-page news release to notify local and national media, as well as the C1 section of the client list.

Bob

Meeting minutes can be short or long, depending on whether you include only actions taken or discussion too. Minutes of society chapter or committee meetings are best kept concise and limited to actions taken. Job minutes need to include discussion, to keep absentees posted and to inform those who don't participate but need to be kept au courant. The record of discussion should be kept also for legal reasons.

Give each major topic a number, the first subordinate topic a number with a decimal, each second subordinate topic a number with two decimals, etc. See the following example.

#### *Scenario*

As project manager you have just completed the Monday meeting of the design team working on renovation of the old Vedette vaudeville theater on Maple Street. You need to let all know what was discussed and what was decided. Arrange the material either in the order in which it was discussed, or according to priority.

#### *Minutes*

Vedette Theater Renovation  
Minutes, 27 October 1997

Present: Jane Talavera, Jane Chang, Charles Mann, William Hord  
Absent: Herbert Smith, Sonny Chavez

- 1.0 Team member reports
  - 1.1 Jane Talavera
  - 1.2 Jane Chang
  - 1.3 Charles Mann
  - 1.4 William Hord
- 2.0 Cost estimates
  - 2.1 Overruns
    - 2.1.1 Foundations
    - 2.1.2 Framing
  - 2.2 Report on labor prices
- 3.0 Schedule
  - 3.1 Report and discussion on fast-track bid packages
    - 3.1.1 Steel
    - 3.1.2 Curtain wall
    - 3.1.3 HVAC
- 4.0 Future meetings

Your writing style should be tight, with unnecessary words omitted; for example:

- 1.2 J. Chang reported that desired glazing system may need substitution due to cost and unreliable delivery. She will explore options and report in two weeks.

## Alternative Media

Both the form and content of your message are affected by the medium you use to transmit it. Until recently, paper was the chief carrier. Even the quality of voice mail had far to go to reach today's levels: you can now convey information without ever speaking to a live person (you know the routine—it's grist to the mill of every standup comic in the country).

It's not that bad. Communicating by voice mail has the virtue of simplicity; it's suitable for short messages, not long rambling disquisitions—remember that the ear is an inefficient medium for taking in information: it takes about ten times longer to hear than to read the same number of words, according to consultant Roslyn Brandt (although the ears can hear three times faster than the maximum speech rate). Software is on the market that allows you to dictate messages of any length into the computer, which converts it into e-mail and transmits it. This way you get the best of both worlds; but the technique is still imperfect and has restrictions that don't yet make it an ideal technique. Voice mail is good for short messages involving simple questions or answers; it is less good for long opinions or instructions, which the hearer must somehow record, or take notes on, before responding.

This is not to belittle the standard two-or-more party telephone conversation, which is efficient for hammering out decisions between people who cannot meet face to face.

An infinitely more promising medium for intra-office messages is a form of e-mail transmission known as the intranet. The intranet, which emerged from a group of proprietary closed network services such as Lotus Notes, connects all eligible employees in a company. It allows them to communicate by e-mail, but provides in addition such features as controlled access, security, confidentiality, simple insertion of recipient's address and any added receivers, and the ability on some networks to transmit graphic materials and attachments.

The principles for writing intra- or inter-office messages over the intranet do not differ greatly from sending memos on paper. If anything, brevity, getting to the point quickly, and determining what action is required are even more critical than when using paper. This is in part because too much time spent in front of a monitor is bad for your eyes, hands, and posture, and in part because the format and generating system of the computer encourage speed, precision, brevity, and candor. I have noted in my years of computer experience a tangibly greater succinctness in received messages compared to the days when most correspondence went out on paper.

The etiquette of writing has changed in the process. Salutations are more Spartan, or gone altogether; there are fewer verbs and adjectives, greater use of the imperative, and less grace in giving instructions. The result is choppy text, and the etiquette of responses is often limited to monosyllables. It's a throwback to the military-style terseness of General McNaughton as he responded to the German call for surrender in the Battle of the Bulge with a simple "Nuts!" and to the pithy brevity of old Western Union telegrams, where each additional word cost you money. Do not let this style cause your messages to be brief to the point of curtness or hostility. That may cost you. Also, many more typos and errors occur in e-mail messages than on paper. If these messages are impor-

tant, proof them minutely. For a more in-depth treatment of on-line "writing," see chapter 11.

Whereas e-mail's impact on writing styles has been highly reductive, facsimile (or fax) transmission has hardly affected writing styles, because the decision to send a message by fax commonly happens only after a letter already exists on paper. Software now exists that allows you to create and transmit faxes completely electronically.

If there is a rush to get your message out, the route of choice is increasingly to go e-mail and not bother with fax. Chances are that by the end of 1998 all businesses, even modestly sized ones, will be "wired."

On occasion you will be called upon to write on matters that, while linked to business, are so clearly social as to call for a departure from the detached, impersonal tone of most correspondence. Consider the following situation, and the called-for response.

### Scenario

Your travels as a partner in the eight-person, Atlanta-based office of Heron & Heron take you to Sacramento. This also happens to be the home town of Gene Gerahy, a junior designer who recently joined your firm. Gene gave you an introduction to Mr. Reginald James, a prominent Sacramento businessman and philanthropist. The Jameses ask you to dinner at their impressive mansion situated not far from the California governor's new house. The dinner is sumptuous—Gene is obviously a James favorite. Just before the dessert, it transpires that Mrs. James chairs the Sacramento Symphony Foundation, a largely fundraising society that is looking critically at the size and condition of the city orchestra's cramped current quarters. No direct, but a few indirect, overtures were floated as to a future role for Heron & Heron in the matter.

The encounter clearly calls for a thank-you note. The borderline between a marketing and a social occasion is fine, as in this case. Probably the best approach is to dwell on the social occasion, to mention favorably but not gush about the work of the symphony foundation, to mention that both Mr. and Mrs. James had revealed a polite interest in architecture and in your firm, and that you would send them for their amusement a profile article the *Atlanta Constitution* had done about four young Atlanta firms the previous month—yours among them. Keep it brief. Then sign off. And avoid presents. If you have personal office stationery, now is the time to use it. Omit your title in the sign-off; it smacks of business.

### Letter

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Mr. and Mrs. Reginald James  
8 Elm Drive  
Sacramento, CA 95801

Social C