



## 25 Questions to Ask for Successful Client Onboarding

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Any experienced architect or builder knows how critical it is to have good working relationship with clients before undertaking a construction project. But managing client expectations through the complex process of building a structure, whether it's a home, office space, or industrial facility, is one of the more challenging tasks building industry professionals face.



That's why it's critical to understand client expectations from the outset and make sure you can meet or manage them. A design brief isn't enough, especially for clients who are new to the building process. Start your relationship with a clear client onboarding process to help determine whether or not your firm is a good fit for the project and the project owner.

Increase your chances of smooth sailing on your next design-build project by implementing a client onboarding checklist.

We've crafted 25 critical questions to ask your client as an architect or builder in the initial stages of planning that next construction project:

1. Why do you want to design and build a new home or office/commercial space?

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What major goals do you want to achieve?

What are your five highest priorities?

2. In your current space, do you have too much of one kind of space and not enough of another?

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Maybe too little storage and too many bedrooms?

Or too few collaborative spaces and too many individual offices?

3. Have you selected/purchased a site for this project?

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Can you provide site specifications, potential construction restraints, and/or zoning concerns?

4. Will the structure need to meet specific HOA requirements (in the case of a residential project) or blend into surrounding styles of architecture?

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If so, what styles of architecture and types of building materials are used in surrounding structures?

5. Are there views or landscape features you want taken into consideration when siting the building?

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Do you want to establish a connection to the outdoors with your indoor spaces?

What are your desires in terms of outdoor living and working spaces like porches, decks, and patios?

6. What is your budget for this project and how flexible is that budget?

7. Will you be using financing for this construction project?

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If so, has your construction loan been approved?

8. What is your desired timeline for project completion?

Do you have schedule restraints?

9. How will you or other members of your household or team be using the spaces in this building, and how frequently?

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For example, if you're building a new home, do you work from home? Do you entertain people often? If you're constructing a new commercial space, will it only be used during the day, or will it be open 24 hours? Where do members of your household or your team spend most of their time?

10. Do you have strong feelings/ideas about design?

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If so, describe overall design preferences, or provide photographs or drawings of designs you like.

11. Are there particular architectural features you'd like included in the building?

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Examples might include fireplaces, cathedral ceilings, or wine cellars.

12. In terms of design layouts, do you prefer open concept design or clearly delineated spaces?

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In a home, this might be the difference between a kitchen open to a great room (and one that isn't) or, in an office space, a co-working space model versus individual offices.

13. Do you have preferences on building materials?

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Do you prefer natural materials over synthetic materials?

Do you have any types of materials in mind for this project?

14. What kind of aesthetic are you looking to achieve in the building?

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For example, do you want to convey a sense of calm?

Do you want an atmosphere of clean efficiency?

15. What do you want to achieve in terms of lighting?

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Do you want to take advantage of natural light as much as possible?

Do you want particular rooms or spaces to be bright at some times of day and darker at others?

16. Have you worked with an architect and/or builder previously?  
What did you like and/or dislike about the experience?  
What qualities are you seeking in an architect and/or builder?

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For example, do you want someone with whom you can collaborate extensively, or are you looking for someone to provide strong guidance on design and building options?

17. Are you interested in reviewing/walking through some of our past projects to help determine if we are a good fit for your project?



18. What are your biggest concerns/worries in undertaking this project?

19. Does the design of the building need to incorporate spaces for equipment, unusual or large pieces of furniture, or artwork?

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Examples might include tractors, forklifts, grand pi-anos, or sculptures.

20. Will this project include outbuildings or ancillary structures like storage buildings, pools, or guest quarters?

21. Are you interested in pursuing design options and construction methods and materials to achieve greater energy efficiency, acquire green building certification, meet certain sustainability goals, or reach net zero on energy consumption?

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Do you have any specific energy efficiency systems you would like to use, like solar panels or geothermal HVAC?

22. Does project construction need to take into account persons with disabilities, mobility issues, or allergies?

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Should the design accommodate future mobility issues, like those that come with age? Please explain.

23. What are your expectations regarding building maintenance, both in terms of investment of time and money?

24. How long do you plan to own this building?

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Should the architect and builder take future resale value into consideration during the design and planning process?

25. Who will be the point of contact for this project for the architect, builder, and other potential professionals involved? And will that person be available for regular meetings or consultations with the architect and/or builder as needed?