

The Risk Management Plan: A Fundamental for Business Success

6. Practice Management, Project Delivery, and Quality Management

Here's a list of key activities and tools that enable successful project execution:

- **Project Planning:** alignment of scope, schedule, deliverables, staffing, financial goals
- **Project Delivery Process:** baseline of key activities for your firm throughout all project phases to establish consistency
- **Tools and Templates:** standards, guidelines, procedures, protocols, checklists
- **Quality Management Plan:** continuous, phase milestones
- **BIM and Digital Practice:** digital exchange agreements, BIM Execution Plan
- **Sustainability, Building Performance Plan:** understand client's (owner's) project requirements
- **IT and Design Technology:** systems and support to enable staff performance; sufficient level of investment; software management; cyber security and data backup-recovery
- **Accountability and Responsibility:** clearly define roles, responsibilities, and expectations of internal team, subconsultants, contractors, and other parties in project delivery
- **Financial Performance:** regularly share key data, including financial goals and project progress updates

7. Staff Training and Development

Your staff is a key asset, and your investment in training and knowledge transfer can lead to long-term retention of your employees. The retention of qualified staff is going to be your strongest means to achieving your quality management goals.



- Develop staff and make investments for long term retention
- Cultivate and appreciate design, technical, project management, and administrative resources
- Recognize and capitalize on generational differences with two-way mentoring
- Provide training in leadership, communication, team management skills
- Offer opportunities for growth
- Create a culture that values quality and risk management

Once the seven areas of the Risk Management Plan become ingrained in the culture of your firm and integrated with project management tools and techniques, the results will be tangible.

About Berkley Design Professional

Berkley Design Professional (Berkley DP) was created in 2013, by a team of insurance professionals with a passion for the design industry and deep roots in Architects and Engineers Professional Liability underwriting, risk management and claims management. The genesis of Berkley DP was the combination of our team's commitment to bring fresh ideas to the products and services design professionals need together with the resources of W. R. Berkley Corporation. Berkley DP's motto is: Better By Design®. By this we mean that our policyholders can become better businesses by leveraging our innovative risk management solutions, fair and experienced claims services and comprehensive architects and engineers professional liability coverage.

BDP Risk® is Berkley DP's state-of-the-art Learning Management System (LMS), which provides 24/7 online access to relevant risk and practice management content, streamlined online learning, and education activity tracking and reporting. BDP Risk® won a coveted Brandon Hall Group bronze award for "Best Advance in Custom Content," which recognizes self-paced, custom-designed online courses related to workplace learning. This award reflects Berkley DP's ongoing successful efforts to help design professionals improve their practices, enhance business performance, earn risk management education premium credits, and mitigate professional liability claims.



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Practice management recommendations should be carefully reviewed and adapted for the particular project requirements, firm standards and protocols established by the design professional.

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