RIBA CPD Core Curriculum
Study Notes

03 Business, clients and services

Understanding the principles of good business practice and service provision, and the relevant legal frameworks. Having the knowledge and skills to ensure that the business you own or work for is managed competently, ethically, effectively and efficiently, with sound financial and quality management, and the appropriate systems, processes and procedures in place.

The legislative framework and due diligence
– Intellectual property rights, copyright law.
– Insurance, employers, PI and liability.
– Duty of care, professional liability, negligence and professional indemnity, including insurance warranties.
– Obligations to stakeholders, warranties and third-party rights.
– Employment law *https://www.gov.uk/browse/employing-people*
– The Equality Act 2010 and the nine protected characteristics.
– Health and Safety at Work Act *http://www.hse.gov.uk/legislation/hswa.htm*
– Workplace pension provision *https://www.gov.uk/browse/employing-people/pensions*
– Risk management strategies.
– Data protection and data management policies and strategies.

(See also **01 'Architecture for social purpose'** and **04 'Legal, regulatory and statutory compliance'** Core curriculum topic areas)

Contracts, client agreements and forms of appointment
– Understanding the different contracts and forms of appointment.
– Contracts for professional services.
– Contracts for building projects.
– RIBA agreements for the appointment of architects and specialist consultants.
– Architects' contracts (e.g. as lead or sub-consultant), terms of engagement, scope of services, clear letters of appointment, relevant legislation.
– Advising the client on the right/ best form of contract to be used, and keeping up to speed on updates and amendments to the various forms of contract.

(See also **05 'Procurement and contracts'** Core Curriculum topic area)

Overall business set-up and strategy
– Practice structures and legal status.
– Business styles.
– Time management, recording, planning and review.
– Practice finance, business planning, funding and taxation.
– Administration.
– Quality management, QA systems.
– Recording and review.
– Risk management strategies.
– Project management.
– Having an effective data management strategy and approach.
– Succession planning and retirement planning.
– Proprietary business management software

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The client offer

(Please see the RIBA Client Services publication '**What Do Clients Think of Architects?'**)

– Client relationship management.
– Understanding your client's language and requirements.
– Developing and interpreting the brief.
– Knowing how to explain design proposals.
– Effective communication, presentation, pitching, confirmation and recording.
– Understanding the client's commercial drivers, and having commercial understanding.
– Value-adding activities through design and services.
– Having a clear technical design specification.
– Communication, progress reporting and appropriate and timely advice.
– Understanding engagement and consultation.
– Systems for adhering to the programme.
– Post-occupancy evaluation.
– Managing the handover process.
– The effect that the project has on the function and maintenance of the building

Selling and marketing strategy

– Marketing and promoting the practice.
– Building a brand and reputation.
– Building and maintaining a website.
– Having a strategy for social media, and understanding what to use and when.
– Blogging, using press, and case histories.
– Agreeing a social media policy and strategy.
– Good photography and leveraging Instagram and Pinterest.
– Leveraging Google and other search engines and understanding SEO.
– Competitions, procurement and bids strategies (see 'Procurement and Contracts' topic).

Financial management

– Fee calculation, costing, pricing, negotiation and bidding.
– Resource management and job costing.
– Cash flow monitoring and control.
– Cost monitoring and control, and financial management.
– Programming of services appropriate to appointment.
– Taxation accounting and planning.
– Foreign exchange planning.
– Macro-economic monitoring.
– Contingency planning.
– Management accounting.

Project management

– Project management qualifications.
– Project management soft skills.
– Programming of services appropriate to appointment.
– Coordination and integration of design team input.
– Time management, recording, planning and review.
– Quality control.
– Tools and checks for adhering to budgets.

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Team and people management
- Employment contracts.
- Equality, diversity and inclusion in the workplace.
- Staff management and development.
- A CPD management system.
- Performance reviews and appraisals.
- Team working, team building and leadership.
- Recruitment strategy and hiring the right people.
- Staff retention strategy.
- Retirement planning.
- Understanding the mental and emotional wellbeing of your team

Going digital: developing understanding of
- Collaboration tools.
- Knowledge and document management software.
- Digital platforms for team collaboration such as Yammer, Trello and Slate.
- Leveraging Google and other search engines for your commercial benefit.
- Knowledge of coding and programming

(See also **10 'Design, construction and technology'** Core Curriculum topic area)

Embedding research in practice
- Research strategy for practice, including a research impact strategy.
- Qualitative and quantitative research methods.
- Developing a research proposal.
- Undertaking literature reviews.
- Systematic reviews vs. rapid appraisals.
- Modelling vs. experimentation.
- Formalising case study approaches for client persuasion.
- Using research to inform projects.
- Capitalising on skills relating to uncertainty and risk:
    - Appraisal of financial viability.
    - Ability to maximise investment potential.
    - Efficient business practice.
    - Conversance with patterns of consumption.
    - Maintaining standards while maximising value.
- Writing up research.
- Accessing tax credits for research and development.

(Please see the RIBA's resources on this issue *https://www.architecture.com/knowledge-and-resources/resources-landing-page/knowledge-and-research-in-practice*).

RIBA CPD Core Curriculum: Study Notes

Links to other organisations and resources

ACAS *www.acas.org.uk*

CIPD (Chartered Institute of Personnel and Development) *www.cipd.co.uk*

APM (Association for Project Management) *www.apm.org.uk*

Business in the Community (BITC) *https://www.bitc.org.uk/*

Institute of Directors (IoD) *https://www.iod.com/*

Chambers of Commerce *http://www.britishchambers.org.uk/*

Federation of Small Businesses *https://www.fsb.org.uk/*

The Freelancer and Contractor Services Association *http://www.fcsa.org.uk*

The Creative Industries Federation *https://www.creativeindustriesfederation.com*

Barclays Digital Wings *https://digital.wings.uk.barclays/for-everyone*

British Library Business and Intellectual Property Centre *https://www.bl.uk/business-and-ip-centre*