

# 4 STEPS TO RISK MANAGEMENT

**STEP**



**1**

## GETTING STARTED

- Should I accept the engagement?
- Is it worth it?
- Have you done your background checks?

→ *TRUST YOUR INSTINCTS*

**STEP**



**2**

## SET THE FOUNDATIONS

- Document the client's requirements and your scope of works:
  - Size, budget, use, quality of materials, time for completion.
  - The services you will perform and the standard expected.
  - Services you're not performing and who will be performing them.
- Your deliverables - the specifications you will provide, number of drawing sheets, number of revisions included etc.

→ *USE AN ENGAGEMENT AGREEMENT*

**STEP**



**3**

## APPROVAL PROCESS

- Document the client approval process.
- What documents will be provided to the client for approval?
- When will the client's approvals be sought and given?
- Give the client options and make them choose.
- What happens if the client withdraws approval or changes instructions?

→ *ENSURE EVERYTHING IS IN WRITING*

**STEP**



**4**

## CHANGE OR TERMINATION

- Document the termination arrangements.
- Process for ending the engagement.
- What will happen if the client decides not to proceed?
- What will happen if the client wants a substantial re-design?
- When communicating with your client, refer to the processes set out in your agreement.

→ *FOLLOW YOUR DOCUMENTED PROCESS*

CONTACT WEBBER INSURANCE TODAY TO DISCUSS HOW WE CAN HELP YOU MANAGE THESE RISKS.  
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