

BUSINESS PRACTICES FOR SURVEYORS

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ABSTRACT

The world is changing, and the rate of change is increasing. These changes impact on surveying businesses as least as much as they impact on other businesses. It is in many cases, however, true that the education and training of surveyors (of every discipline) gives a good deal of time to technological developments and their impacts, but rather less time to the changing challenges of management.

A particular strand of the change is that public expectations of professionals are growing in the light of scandals such as those associated with Ivan Boesky and Robert Maxwell. Ethical and other priorities can be particularly tangled for professionals such as surveyors, with their sense of duty being split in a number of different directions – professionals are often subject to (often conflicting) standards of their own, their company, their profession, and the public.

From a review of the changing business environment, we must conclude that the nature of a surveyor's work, both technical and managerial, has changed fundamentally, with the pressures and expectations increasing relentlessly. This places additional pressures on those professional surveyors who are often required to balance the dual roles of being a professional expert and a business manager. Neither role can be ignored, and the abilities of an individual in both of them will continually be challenged.

The very real dual challenges, and the appropriate responses to them, must, of course, be fitted into an organisational and personal agenda (and budget) which has severe constraints in terms of time and resources available, especially for those small firms occupying niche positions. Whatever the inclination of the professional, the challenges have to be addressed if medium-term viability (and sanity!) is to be possible.

FIG has for many years recognised the challenges outlined and their likely impact on the profession. In 1994, therefore, some ongoing work of Commission 1 (Professional Standards and Practice) was pulled together into a working group which prepared a paper entitled 'Management Matters'. At the same time, other elements in Commission 1 were revising/ creating what might most appropriately be described as policy guidance on various issues. Principal amongst this activity was the creation/ revision of two documents:

- The FIG Statement of Ethical Principles and Model Code of Professional Conduct; and
- The FIG Charter for Quality.

The Commission recognised that these were not the answer to the daily needs of a busy professional, but felt that it was important to create principles first. In 1998, therefore, a Commission 1 Working Group on Business Practices was created

The activity of the working group has been ongoing since 1998, with the profile perhaps being highest in the business ethics area, where a number of dilemmas were created to stimulate the debate that is vital in this field. In the area of quality, the working group has considered quality awards and *de jure* quality standards, their relevance to surveying firms, and the interlinking of quality and customer service. Other areas considered by the working group as relevant to professional surveyors (especially those in private practice) have included international legislation, technological developments (particularly in the IT area) and more general managerial matters.

The survival (let alone flourishing) of surveying firms in the future will require investment in business issues as well as (and certainly not at the expense of) technical issues. The leaders of the firm (who may be small in number, in many firms, or a significantly-sized collective in a partnership) have to be clear what their individual and collective managerial strengths are, and who is performing what role. They also have to ensure that the business and professional principles on which the firm operates are clear.

Recognising the vital role for practical, succinct support material, the working group has prepared a draft version of an FIG Guide on Business Practices. This is currently being discussed by interested professionals, with a view of publication in the next 12 months. The Guide currently consists of the following structure:

- Business idea/ plan
- Quality and customer service
- IT
- Professional ethics
- Legal frameworks

The key issues will be collated into a checklist for the busy professional. The key audience for the Guide is seen as professionals setting up in the business for the first time, but it should also be of use for all small and medium sized survey firms. The Guide will be made widely available and is designed to be of use around the world.

In what has often been seen as a vocational profession, it is vital that the professionals running survey firms are able to take on the dual role of professional and manager. Many texts and journals are available to provide targeted guidance on technical matters, but much less exists for the survey manager. FIG, as an international professional body, has recognised that it has a key role to fill this gap, and has been working on a number of areas, attempting (with some difficulty) to stimulate debate and raise interest. A working group of FIG Commission 1 has now created a draft Guide on Business Practices and is seeking input to create a high quality and useful document. All readers of this paper are encouraged to participate in this process, initially by making contact with the author.

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BIOGRAPHICAL NOTE

Iain Greenway joined Ordnance Survey of Great Britain in 1986 after completing an M.A. in Engineering at Cambridge University and an M.Sc. in Land Survey at University College London. A variety of posts in geodetic and topographic survey followed, including short-term consultancies supporting land reform in eastern Europe. After completing an MBA at Cranfield University in 1994/95, which included a term studying at Macquarie University, Sydney, he worked for Ordnance Survey in strategic planning and pricing, sales and marketing, as well as completing a number of management consultancy inputs in Swaziland and Lesotho. He subsequently undertook a secondment to Her Majesty's Treasury, working on the improvement of public sector productivity in the UK.

Since the summer of 2000, Iain has been the Deputy Director of Ordnance Survey Ireland, responsible for much of the day-to-day management of a national mapping agency undergoing profound changes in status, structure, processes and culture.

Iain is a Chartered Surveyor (MRICS) and a member of the Chartered Institute of Marketing (MCIM). He is the RICS delegate to FIG Commission 1, Chair of the FIG Task Force on Standardisation and of Working Group 1.2 (Business Practices). He is also a member of the Management and Editorial Boards of the journal *Survey Review*.