



RISE

Retrofit information,
support & expertise

Client and Consultant Relationship in Procurement

Case study

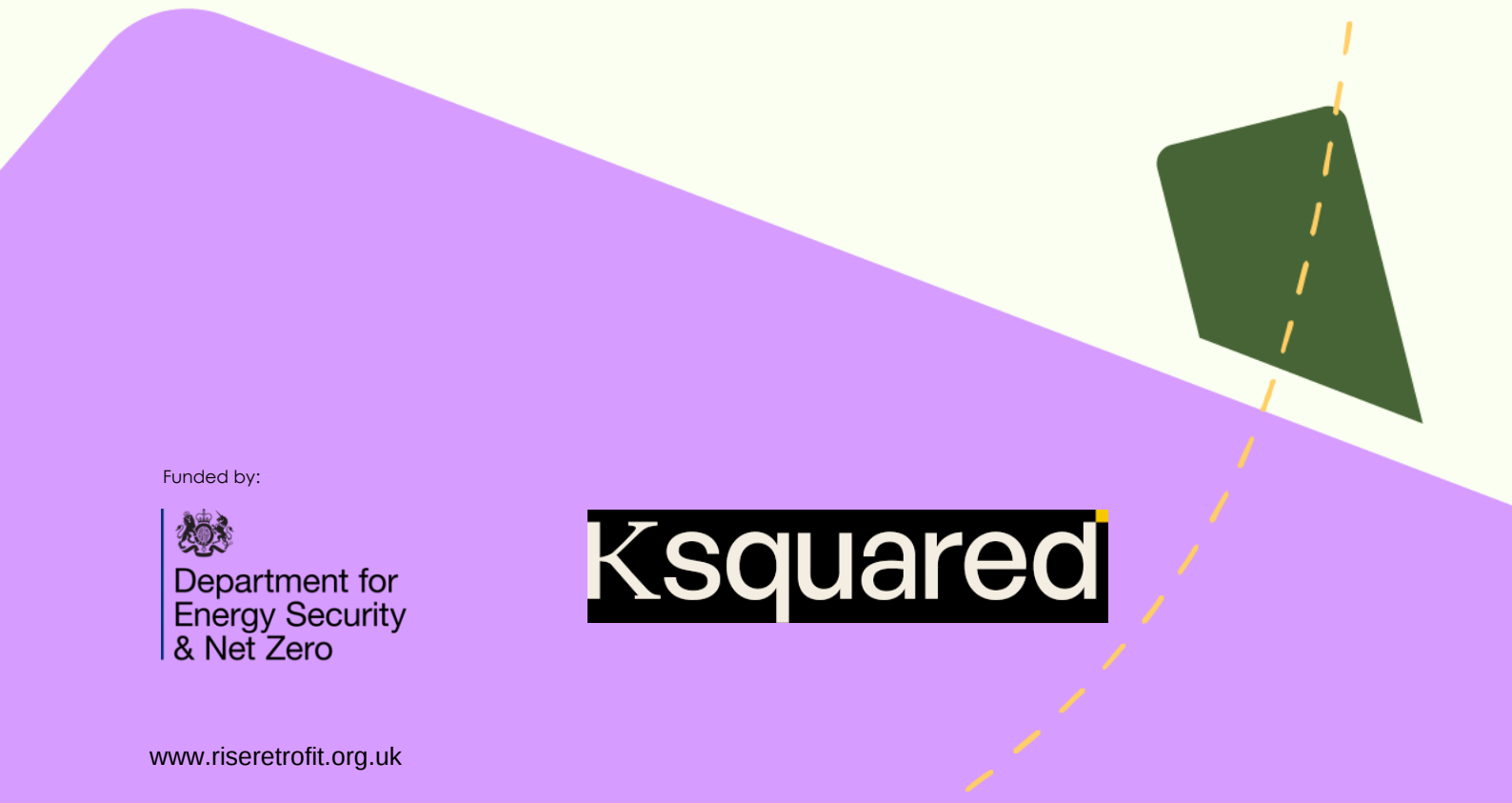
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Introduction

This case study explores the effective management of client-consultant relationships within procurement processes, particularly in the context of retrofit projects for social housing. It draws on insights from Ksquared, a social enterprise with experience in working in partnership with established Registered Social Landlords (RSLs). Here, Ksquared discuss how transparency, trust, tailored communications and adaptability can support successful outcomes. This content should be useful to anyone partnering with a third party to help manage and procure domestic retrofit project services.

This publication aims to share insights, good practices, and lessons learned from relevant retrofit, sustainability and warm homes projects. It is intended for informational purposes only and does not constitute recommendations or endorsements of specific suppliers, products, or services within the sector.

Building trust from the outset

As RSLs, many of Ksquared's clients are deeply embedded in and strive to support their communities. Therefore, partnerships often begin with understanding the client's mission, which might mean gathering information such as:

- Resident demographics
- Community needs
- Other local priorities

As the information on the project and its context is gathered, relevant communications between partners should be recorded. Techniques for this include:

- Minuting meetings and sharing notes
- Being open about project finances
- Establishing shared online space for project documents

Establishing clear and transparent ways to communicate and make project decisions is hugely important to building a trusting relationship. This is especially important when procurement is being led by a third party on behalf of another organisation.

Once trust is established, ongoing communication and reporting methods can be tailored to partners' preferences. This could mean providing formal written reports or giving informal, verbal updates. All options and their respective pros and cons can be considered. The key is to ensure that information is clear, accessible, and mutually agreed.

Engaging communication

Now that the client and consultant are working together in a trusting and transparent way, the partnership begins by focusing on project activities. An early task is likely to involve the procurement of organisations usually within the supply chain that can help deliver the retrofit project. It is essential to keep all partners engaged throughout the procurement process so that:

- The whole supply chain is engaged in the agreed project mission
- All project outputs align with that mission, even as they flex according to practical delivery requirements

Ksquared suggests that adopting a multi-channel communication strategy can encourage engagement and maintain the partnership's momentum. Possible communication methods include:

- **Discovery workshops:** Can be used early in a project to provide an open forum for stakeholders to define programme goals, any important technical requirements, and other project parameters. These workshops help establish a shared understanding on important factors from the project outset
- **Regular meetings:** Used throughout the project to monitor progress, identify and mitigate risks, resolve issues and make timely decisions
- **Targeted events:** Delivered at key milestones to ensure project stakeholders, including residents and the wider community, engage in the project and buy into its objectives. Engagement events can be critical to sharing information, fostering dialogue and maintaining trust with project stakeholders that are uninvolved in its day-to-day delivery. They can also support the development of engagement maps, which monitor and offer insight into resident engagement
- **Lessons learned workshops:** Deployed at key milestones to reflect on a project stage, these can help identify what worked well and whether any adjustments are needed. As a consultant, gathering client feedback at important project intervals supports continuous improvement throughout a project
- **Washup sessions:** At the conclusion of a project, it can be useful to bring people together to discuss lessons learnt from the project. This is often a key part of evaluating a project's success

Targeting expertise to client need

Both partners, client and consultant will bring different strengths to any project. Some clients may be well-resourced in certain core project areas, whereas other clients may want to deliver an innovation that requires consultant input. As these differences are difficult to predict, the consultant needs to understand each client so that they can adapt and respond accordingly. Key considerations include:

- What is the client's internal capacity? Can they deliver some project roles, or do they need a 'turnkey', full-service delivery solution?
- If they can deliver certain project roles, what are they? What gaps need filling?
- Are there any specialist aspects to the project that they may need support with?

Once the nature of the consultant input is established, consideration is given to the resource requirement in more detail. When will it be needed? And for how long? Responding to these questions will help ensure clients get right level of consultant input, and that efforts aren't duplicated.

This assessment of client need is an ongoing process. Throughout the project, the consultant should advise the client on making informed decisions as necessary, using the information in project tools such as:

- Risk assessments
- Cost-benefit analyses
- Key performance indicators

As the project progresses and priorities shift, these tools will allow the client and consultant to work together to make transparent decisions that ensure activities remain aligned with the central mission.

Planning capital works

Like the pre-construction period, the capital works element of a project should be structured to promote efficiency, transparency, and alignment with a client's long-term retrofit goals. It is key to undertake:

- **Condition baselining:** Use existing stock condition data and additional surveys to understand the properties' condition
- **Retrofit assessments:** Utilise retrofit assessments to understand the energy efficiency potential of each property and the measures that are best suited to the building's form and fabric, and the occupant's behaviour and energy use. This information, along with the understanding of condition, will inform the retrofit designs, so that carbon savings from the works are maximised
- **Social value mapping:** Does your client want the project to deliver anything for the community? This needs to be defined during the procurement stage, so that tendering contractors can price the delivery of social value alongside the capital works

Integrating the above will allow for a single, coordinated project schedule that reduces duplication and streamlines delivery. To support transparency, specialists can help independently monitor project outcomes, verifying that energy efficiency targets have been met, funding spent appropriately, and social value commitments delivered.

Managing project risk

Working together with a client, Ksquared adapts a three-part framework to manage risk. This covers:

- **Financial governance:** Regular financial reconciliations and payment controls ensure alignment with funding requirements
- **Compliance:** Establishing clear processes to distinguish between errors and non-compliance
- **Technical risk:** Managed through industry best practice standards such as PAS 2035 and monitoring contractor performance

Risk registers for each part of the framework are maintained throughout the project. When risks are identified, they are assigned to an accountable body, who should take forward any mitigating action agreed. This helps to prevent risks turning into project issues. Weekly cross-functional reviews then bring together leads for each risk area, so that risks can be assessed, prioritised and dealt with collaboratively. This helps the project to progress smoothly and with resilience.

Being adaptable

Ksquared recommends staying ahead of industry standards and policy changes by:

- **Training:** Team members regularly participate in training and upskilling in relevant standards, such as PAS 2035 and BS 7913. This ensures that the projects they're involved in follow industry best practices
- **Innovation:** Supporting clients to install new technologies, such as in-home monitoring devices, that test the effectiveness of retrofit works and build the case for further funding and other finance
- **Sector insight:** Ksquared tracks regulatory updates and funding changes, so that new policy can be quickly integrated into project planning and client communications

