

6th Annual ASFE Business Roundtables

Denver, CO
October 26, 2012

6 Roundtable Topics

1. Project Management, Change Management and Contracts

- Lee James and Dan Cassidy

2. Career Tracks and Progression in A/E Firms

- Matt Poirier and Ken Johnston

3. Alternative Project Delivery and Teaming Opportunities

- Randy Knott and Dave Harwood

4. Selling Value instead of Low Fees

- Ted Lewis and Matt Moler

5. Health Insurance Options

- Stewart Osgood

6. How is Technology Leveraging your Firm's Brand & Expertise

- Charlie Head and Dean McClure

Disclaimers

- Comments and ideas presented herein are not the opinions of ASFE, BP Committee or RT Moderators
- Only a sample of the RT discussions is presented here
- Official ASFE report of the RT discussions will follow
- You don't have to agree with everything presented
- I am only the messenger

1. Project Management, Change Management and Contracts (47)

- Project Manager's roles and responsibilities vary from firm to firm, and need to be clearly defined, written down and communicated to all staff
- Project Managers need training; not taught in school
- Factors that often lead to PMs avoiding change orders:
 - Fear of failure
 - Over-confidence
 - Self esteem issues
 - Conflict avoidance
 - Client intimidation

2. Career Tracks and Progression in A/E Firms (22)

- Four distinct career tracks:
 1. Technical
 2. Project Management
 3. Business Development
 4. Business Management (Running the Business)
- Most firms are working to develop programs to communicate career paths to staff, but formal well-functioning programs are not the norm
- For smaller firms, the leadership often wears many hats (i.e. the chef, server, and dishwasher)

3. Alternative Project Delivery and Teaming Opportunities (21)

- DB and P3 delivery methods allow opportunities for increased revenue and participation in projects, for both small and large firms
- Small and large projects are adaptable to DB and P3 delivery methods
- Member firms expressed interests in:
 - Guidance on MOU, confidentiality agreement, teaming agreement, contracts ,and insurance
 - Small Business participation
 - Compensation models

4. Selling Value instead of Low Fees (34)

- Selling value is most effective when we are able to speak directly to the ultimate client
- When educating clients, we should do it in a way they understand
- A key to providing value is understanding the client's issues and needs
- There are numerous free or low cost tools and technology that can add value

5. Health Insurance Options (9)

- People are generally happy with the quality of their health insurance product, but are not happy with year-over-year cost increases
- Firms are sharing cost increases with employees by:
 - Reducing their contribution to the premium
 - Increasing deductibles to reduce costs
- Some larger firms have converted to self-funded plans
- Wellness programs are common, but do not necessarily reduce costs
- Smaller firms are looking to trade organizations as a vehicle to join larger pools and reduce costs

6. How is Technology Leveraging your Firm's Brand and Expertise (23)

- Firms are increasingly leveraging technology to enhance client service and value, but are challenged to obtain return on IT investment
- Mobile strategies, like "bring your own device", have yet to catch on with many firms
- A number of firms are migrating to the cloud, and demands for connectivity will increase use of the cloud in the future
- Websites will need to become more dynamic and interactive to leverage brand, including use of video and interactive links, and will need to be supplemented with social media



Thank You

- Participants for freely sharing ideas and experience
- Moderators for keeping decorum and discussion notes

Questions?