



## Notes Template for Facilitators – Fall 2020 Business Round Tables

### Topic: Leveraging Technology to Support Businesses in Uncertain Times

Facilitator: Chuck Brewer

Number of participants: 7

Briefly summarize up to ten things from the discussion that were of most interest. This might include points discussed, concerns expressed, lessons learned, advice given, solutions offered, case histories presented, or anything else related to the topic. Expand the boxes as needed.

1	Do not do technology for technology, it needs to be for a business solution.  Accounting, CRM, GIS
2	Virtual workplace forced by Covid. Companies found out that it worked better than they thought.
3	Virtual workplace can save money on office space and travel.
4	Companies are finding out that technology like zoom is becoming the standard for meetings with clients, staff, and training.
5	With virtual offices it can make hiring someone easier because they can work from their present location and many times do not have to move. So, it can open up the pool you are looking at.
6	With these new technologies people feel more connected than they used to working from home. They have helped the communication between staff.
7	When rolling out a new technology, sometimes it is good to bring in help that can train the staff that is somewhat technology challenged. Training older staff how a table works when all they know is paper and pencils.

Summarize the three most important items from the discussion that should be shared with GBA members:

1	Company's poll on virtual offices: 15% of staff does not like it 15% of staff want to do it all the time 70% of staff would like a hybrid going forward (2 days in the office – 3 days working from home)
2	Use outside help when try to deploy new technology. We are engineers and geologist and do not have the best training skills (soft skills)
3	Virtual office can help in the recruiting of new staff.

Topic: \_\_\_\_\_ Leveraging Technology \_\_\_\_\_

Facilitator: \_\_\_\_\_ Victor Barchers \_\_\_\_\_

Number of participants: \_\_8\_\_

Briefly summarize up to ten things from the discussion that were of most interest. This might include points discussed, concerns expressed, lessons learned, advice given, solutions offered, case histories presented, or anything else related to the topic. Expand the boxes as needed.

1	Question 1 – Woody – One of the challenges is understanding what tech is available, and how to implement it. Henry Haselton – Aspect Consulting Geotech practice lead, tech arm in the company that was an investment in the last few years. Struggled for a couple years, but seeing web design and GIS etc. successes recently. More efficiency and higher quality deliverables. Database tech to organize complex information like water rights. D. Zmijewski – clients want everything yesterday and decision making is urgent so efficiency is critical. Jon Ordway – Covid related discussion – using virtual meeting platforms for public meetings. Seeing higher attendance at meetings as they became more accessible.
2	Question 2 – Henry highlighted importance of fixed price and LS contracting to take advantage of internal savings from technology efficiency. T&M projects are tough to capture costs of technology. Complex projects are difficult to value-base your data evaluation and professional time.
3	Question 3 – Henry Haselton – company is currently transitioning accounting systems through internal IT department. Accounting needs versus IT needs requires a committee to represent the various groups affected by the changes. D. Z. discussed standardized form for testing through internal IT group. Challenges with one size fits all solutions for different project requirements. Failed to anticipate the different reporting requirements and now are

	considering going with specialty tech firm to help with this. Challenges getting everybody to buy-in and accept the new technology because it is a change.
4	Question 4 – Rob Sandquist – Smaller 50 person firm so it doesn't make sense to be leading edge with tech. Need to wait until wider acceptance of technology in industry. Different clients with different needs that make custom solutions challenging. J. Varnier – depends on what the goals are, if you are doing it to win business it may be important to be leader in tech. Jeff Gebhard – potential for renting/leasing tech and selling those services without owning it outright depending on what the value proposition is to the clients. Example – we pay specialists to fly higher quality drones, and our value is analyzing the data and consulting. Jon Ordway – sometimes we have to be leading edge to survive in some circumstances. Early adoption can be competitive advantage.

Summarize the three most important items from the discussion that should be shared with GBA members:

1	Leveraging technology is very dependent on contracting strategy. Difficult to realize gains from technology if stuck in T&M contracts with clients not interested in paying for the tech.
2	Significant risk for smaller firms to be early adopters of tech that may not work out as they hoped. Important to wait for proven solutions that can be scaled to fit business.
3	Investment costs for new tech can be more manageable by renting/leasing or outsourcing to specialists and focusing on selling the value of professional consulting services rather than owning hardware/software. Avoid falling behind but also avoid burdensome upfront costs.

**Leveraging Technology Breakout Session**

Facilitator: **Steve Thompson**

**Video calling and conferencing:** Larger multi-office firms were already doing it. Smaller firms had more work to do to get it up and running. Older staff not as comfortable doing it as younger people were. Zoom was definitely the preferred platform for interaction with clients and even for in-house use even though many firms have Teams up and running for in-house use as well. Kudos to Zoom for simplicity of use, rapid innovation and good marketing.

**Working from home:** Companies who had already made the move to 100% laptops (at least for technical staff) were able to adapt quickly. Companies with staff on desktops struggled more – some let their employees take their desktop computers home. More than a few staff seemed to have little concern about presenting a reasonably professional appearance on a video call. That can be an even bigger problem when it extends to calls with clients. Some firms have a mandatory

“cameras on” requirement for internal team calls so they can monitor an employee’s home work space and dress habits. Use of a background image on video calls seems like a simple enough concept for those who don’t have dedicated home office space already – just make sure it’s not Star Trek, South Park, Pokémon, etc. Accountability and utilization of at-home workers has been much better than expected. In fact some participants thought their work force was more focused at home than at work. So much for open office layouts intended to create “serendipitous encounters.” Onboarding new staff was one exception to that situation – it was widely acknowledged to be a real challenge to get new staff who had been hired after COVID up to speed *without* the serendipitous encounters that help new staff build relationships and figure out how stuff *really* works “around here.”

**Collaboration tools:** Firms are using OneDrive and SharePoint much more than they were before COVID, both internally and with clients. It seems we can thank COVID for breaking barriers to this type of sharing that were still in place on both the consultants’ and the clients’ side. OneDrive got pretty high marks for simplicity and usability. Several participants mentioned the need to know what you’re doing and be very careful about access permissions on your OneDrive if you don’t want to share more than you intended with your clients. SharePoint was repeatedly skewered for its steep learning curve and the need to have SharePoint experts on staff to help run the sites but it still remains a popular choice for creating project websites with client access.

**Training:** Most firms were winging it with regard to training on new technologies. The more tech savvy employees didn’t really need training to figure things out and the less tech savvy just didn’t use the tools as much. One firm brought in outside training to help their entire staff take full advantage of the tech tools that are available.