

# ROUND TABLE

## Wrap-Up

### ANNUAL CONFERENCE 2024

As part of the 2024 GBA Annual Conference, the GBA Business Practices Committee hosted several round table sessions to discuss important current issues facing the geoprofessions. What follows are the notes from each round table discussion. Use these notes for discussions with your team, to prompt a review of policies, or as a kickoff to a strategy brainstorming or future planning session.



### BEST WORKPLACE APPS TO INCREASE EFFICIENCY/PROFITABILITY

#### Abstract

Our phones and the applications on them have become an extension of our toolbox. In today's fast-paced business landscape, leveraging technology is crucial for optimizing productivity and driving profitability. What are some must-have workplace apps that can significantly impact your team's efficiency and overall success?

#### Most Important Takeaways to Share with GBA Members

1. We are using 1% of Microsoft/SharePoint capabilities; there are a lot of apps within Microsoft Office Suite that we do not know about (Power Automate being one of them)
2. Great field apps that can aid in project documentation/mapping/photos/etc. are Moasure, Filio, CompanyCam, Rockd, Stereonet Mobile
3. Todoist is an organization/productivity tool that can capture to-do's, urgency, estimated time, etc.

#### Other Key Discussion Points

- Common: PDF Scanner (there are several other apps that do this); Notes app on the iPhone or standard Notes app on Android; Microsoft Lens does the same.
- OneNote – Great way to take notes in a meeting and collaborate with multiple users at once. (This comes as part of Microsoft Office.)
- CompanyCam – Searchable database, photos, and file saving; coordinates on a map, etc.; cloud-based; lots of functionality (sending links to clients, for instance); can also turn photos into PDFs (roughly \$20/month per user)
- Filio – Competitor to CompanyCam; Filio.iO (roughly \$20/month per user)
- Todoist – Allows capturing of to-do items; categories, projects, estimated time to complete task; priority level (\$72 per year)
- FieldMove Clino – Allows geological mapping (strike and dip measurements);
- Stereonet Mobile – Same as FieldMove above; Rockd is another rock app.
- Moasure – Measures distance/topography/distance between points; has a gyroscope and accelerometer (\$600)

- Power Automate – Microsoft; low code/no code process controller. Can create “rules” with Microsoft products. Microsoft “Lists” app also – works together with Power Automate to do some great process things for an organization; Power Automate is built to work under SharePoint
- SharePoint – Not just document management; Lists that can control metadata and control processes
- Obsidian – App that allows you to store and organize your notes on your device to help customize your workflow



## ALTERNATIVES TO OWNERSHIP TO RETAIN GREAT EMPLOYEES

### Abstract

Not everyone wants to be an owner in your firm. GBA member firms must rethink traditional approaches to retain their top-performing employees. The concept of ownership – once synonymous with loyalty – is now being challenged. What are some innovative strategies that foster employee satisfaction, engagement, and long-term commitment?

### MOST IMPORTANT TAKEAWAYS TO SHARE WITH GBA MEMBERS

1. Desire for ownership within firms generally depends on position in career. Younger staff generally prefer benefits that have a more immediate financial impact, improved work-life balance, and better their communities and the environment, while more senior staff prefer retirement benefits or ownership.
2. Having clear and defined career paths is extremely important. Must have regularly scheduled mentoring sessions, reviews, and feedback. Job shadowing is also beneficial in helping staff see potential opportunities.
3. Management needs to be accessible to staff. Also, having support groups for staff members (i.e. peer-to-peer groups, engagement committees) is important to help build a relationship with other staff and help build loyalty to the firm.
4. Flexibility is important. Everyone wants something different. Some want flexibility in their daily schedule and work location. Benefits are important. It could be helping with financial advice, mental health, etc. Better work-life balance.

### Other Key Discussion Points

- The value of company ownership stake varies among staff levels. Senior staff generally have a stronger desire for ownership.
- Younger staff values flexible work schedules, time off for community service, and sustainability over ownership.

- Many staff members don't see 401(k), ESOP, and profit-sharing programs as great value due to stage in life and other priorities. Generally, they are more concerned with salaries to help them with the high cost of living over retirement savings. In addition, many don't see themselves staying in a company for a long time, so retirement benefits are not as important.
- Issues can arise when trying to recruit senior-level candidates who may have ownership in a previous firm they worked for but won't have that same opportunity with a new firm for various reasons (i.e. ownership structure, investment levels required).
- Having engagement committees or peer-to-peer groups within firms has proven value in staff retention. Employees appreciate the opportunity to have a support system around them.
- Having clear and defined career paths is critical for staff retention. Younger staff like to step up the career ladder faster, so more job descriptions/levels may help meet this need.
- Senior leadership needs to be very accessible to staff. They need to understand what drives staff members and their goals.
- Remote work does not create culture at a firm and doesn't help with retention in all cases. It generally will not build strong relationships with other staff members because it is easier to leave the firm. If offering remote work, consider a hybrid model with a schedule of days that the employee is required to work from the office. This also might be a way to reward seniority.
- In instances where geography is an issue, remote work may be a good option.
- To retain staff, consider using a different pay scale for pay raises based on position. Entry-level/early-in-career positions may get a higher percentage raise than more senior staff.
- One firm started using their 401(k) matching funds towards an employee's student loans rather than towards 401(k) match. Again, helping staff with high expenses as they enter the workforce may be more important than retirement planning or company ownership.

## USING AI TO INCREASE EFFICIENCY AND PROFITABILITY

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### Abstract

In 2023 artificial intelligence (AI) emerged to the public forefront and has the potential to disrupt the geoprofessions or be a powerful catalyst for growth. How can GBA member firms utilize AI to drive efficiency, enhance profitability, and revolutionize their organization?

### Most Important Takeaways to Share with GBA Members

1. Develop our understanding and knowledge of AI. AI is not going away, so it is important to educate ourselves so we do not fall behind. Also, recognize that AI is rapidly evolving.
2. Implementation guidelines and standards. Each company needs to have their own specific set of guidelines and standards.
3. It is important to have quality control outputs. The human element needs to be part of the process.

### Other Key Discussion Points

- Upper management could be a roadblock to implementing new technologies. If current processes are working, then why change?
- A lack of understanding of new technology limits companies in approaching change. It is important to educate about new technologies, so we know what is available.
- We need to be active actors, not just passive spectators. Someone needs to be overseeing the new technology and not assume it will run without us. Need to have checks and balances.

- Repetitive tasks can be delegated to AI.
- It is important to quality control the AI outputs. Monitoring will also help us understand what inputs may need to be adjusted.
- AI can provide value on projects rather than basing everything on cost per hour.
- There is a risk of commoditization of the geotechnical practice.
- Increase or reduction of risk.
- Implementing new technologies requires overhead for IT/Tech development.
- There are requirements for guidelines and standards on how to apply AI. This information needs to be available and updated.



## REMOTE SENSING TECHNOLOGY TO OVERCOME STAFFING SHORTAGES

### Abstract

In the face of persistent staffing shortages across geoprofessional firms, GBA member firms are turning to innovative solutions to do more with less, including the use of remote sensing technology. How can this help in mitigating workforce gaps?

### Most Important Takeaways to Share with GBA Members

1. Investment costs of using technology versus the company's personnel. Using people for the fieldwork allows additional revenue. How do we get paid to train staff on using the technology, and can we get paid for the learning curve of new software and remote sensing equipment? What is the return on investment of the new remote sensing technology?
2. What are the costs of learning new remote sensing technology? Will we have enough future jobs to make it worth the time and cost involved in training staff to understand the equipment and software?
3. Potential problems: Malfunctions, connectivity issues, sabotage, theft, or generally the equipment not working properly when we have relied upon it to collect important, client-paid data.

### Other Key Discussion Points

- There are a wide variety of remote sensing applications and software in geotechnical and CoMET.
- Return on investment of new remote sensing equipment. Lose money on the first project? How many projects until the remote sensing equipment is profitable?
- Redundancy of remote sensing equipment is needed to ensure data if one device malfunctions

- Size of the job may dictate using remote sensing equipment due to duration, distance from office, true project size in acreage/development
- Reduced learning of actual fieldwork by junior staff and how to interpret data obtained that they may never have physically obtained in the field.
- Equipment connection issues. Discussion of cell networks, satellite-connected devices, and malfunctions
- Theft, sabotage, and vandalism of remote sensing equipment
- Concern of staff that they will be replaced by remote sensing technology. An example was given of a land surveyor crew chief not wanting to learn the new surveying equipment and was resistant to upgrading to the newer equipment.
- Can we compete against smaller firms that only utilize the specialty remote sensing technology on a daily basis on numerous projects (niche firms)?

## **GET PAID QUICKER – ATTACKING ACCOUNTS RECEIVABLE TO INCREASE PROFITS**

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### **Abstract**

Cash is king and getting paid quicker is paramount for the sustained profitability of every GBA member firm. This round table discussion centers on proactive approaches to speed up accounts receivable collections and bolster your bottom line.

### **Most Important Takeaways to Share with GBA Members**

1. Contract Terms – Negotiate terms (pay when paid, <30 days, due upon receipt), discounted rates
2. Process – Dedicated billers; Check-in that it was received. “Avoid 3rd party systems” “withholding deliverables”
3. Follow up – Tracking, meeting regularly to discuss, PM/relationship before elevating to accounting/collections

### **Other Key Discussion Points**

- Contract terms – Pay when paid – On their timetable, don’t agree to the terms. Didn’t result in less business. Pay upon receipt.
- Execution – Checking in regularly – Meeting with PM to review the status of AR and reasons why payment is late or slow.
- Contract terms – Adjusted rates to improve payment terms/rates
- Contract terms – Who is the client and does it matter – Contractor, Architect, Agency; Federal/Government/Tribes
- Process – 3rd Party systems. May require a specialist. Fee required. Additional time.
- Process – Withholding documents until payment. Unethical? Don’t expend additional effort on the project
- Process – PMs, dedicated billers, assistant PM
- Process – Checking on invoice 0-15 days; did they get it, did it go to the correct person?
- Follow up – Collections, PM; who has best relationship? Email, call, focus on PM/client relationship

## CLIMATE RESILIENCY OPPORTUNITIES FOR GEOPROFESSIONALS

### Abstract

As the world grapples with the escalating impacts of climate change, geoprofessionals find themselves at a critical juncture and a decision point to identify opportunities for geoprofessionals in the future. This round table discussion explores the intersection of climate resiliency and infrastructure, highlighting the pivotal role geoprofessionals play.

### Most Important Takeaways to Share with GBA Members

1. The most important consideration is educating our clients so they better understand the risks and the limitations of our deliverables.
2. Many clients will likely ignore this concern due to the costs associated with it until laws or building codes require that it be considered in the design of new buildings and structures or until banks/funders for their projects demand it.
3. The biggest challenge is how to sell this expertise to clients who don't understand or don't want the increased costs for these services.

### Other Key Discussion Points

- CoMET may have opportunities in 1. Providing expertise with changing construction materials, such as new types of cement that have been developed that have a smaller carbon footprint; and 2. Helping contractors deal with less predictable weather.
- Geotechnical engineers can address how climate changes impact their projects (differing frost depth, changing depth of seasonal moisture change, changed flooding risk).
- The primary driving force that will persuade our clients to consider climate resiliency is the demands of the banks that are financing the projects. Without demands from the funding providers, the owners/developers would likely ignore the concerns since they will increase project costs.
- Increased frequency and intensity of storms will increase maintenance costs for buildings and other structures. Geotechnical and CoMET practitioners should discuss this concern with clients.
- Retrofit of existing structures to endure the impacts of climate change will likely be a large market opportunity
- When providing deliverables (such as geotechnical reports) to clients, we should include information on how the recommendations or design that we are providing will be impacted by climate changes such as heavier rainfall, more severe droughts, more frequent flooding, or changes to water tables.
- Many clients will likely ignore this concern due to the costs associated with it until laws or building codes require that it be considered in the design of new buildings and structures
- The most important consideration is educating our clients so they better understand the risks and the limitations in our deliverables
- Geotechnical engineers can provide additional water infiltration testing for stormwater detention basins as stormwater management becomes more complex.
- Environmental consultants will have increased challenges as rainfall becomes less predictable, which makes their groundwater and surface water modeling less certain.

## IMPROVE MEMBERSHIP ROI – RETURN ON INVESTMENT IN GBA

### Abstract

Your company pays to be a GBA member to provide best practices, networking opportunities, and professional development resources for your members. To enhance return on investment (ROI), let's discuss ways your firm is leveraging all the benefits of membership to improve the trajectory of your employees and help make your company smarter, stronger, and more successful.

### Most Important Takeaways to Share with GBA Members

1. Look for ways for employees who don't attend conferences to engage with GBA peers. Examples include GBA peer groups and the upcoming Career Continuum. This connection really helps employees experience/understand the GBA value and share resources with others within the organization.
2. Use existing training platforms to share GBA content and get it to a wider audience. Example: Incorporate Case Histories into existing PM training
3. For larger firms that struggle with reaching a broader audience, establish multiple ambassadors to GBA, perhaps geographically or by service area.

### Other Key Discussion Points

- Encourage participation in committees to increase engagement and value
- Issues with GBA NEWSLog being delivered due to company spam filters is a roadblock in some cases
- Continue to develop more GBA offerings that provide a way for more people to engage outside of the conference (e.g., Career Continuum, peer groups)
- In the GBA NEWSLog, include short (<5 minute) videos on a topic with links to more resources in the GBA Library (e.g., Case Histories, podcasts, etc.). This will help to get important topics out to a broader audience with limited attention spans, and give them the opportunity to explore further if desired.
- Incorporate GBA resources into company training programs that already exist to lighten the lift for the facilitator. For example, incorporate the use of "Taboo Words" and "Avoiding Absolutes" Best Practices in Writing Training; incorporate the use of case history or management podcasts in PM training
- Listen to podcasts in the car or while exercising and encourage others to do the same.
- Conduct Case History Lunch & Learns. Have people read the case history first so that the Lunch & Learn can be more of a discussion forum. This can also be done with the Case History podcasts, where people listen to the podcast before attending the Lunch & Learn.



## MANAGING STRESS AND IMPROVING MENTAL HEALTH

### Abstract

People are more focused on their mental health now than ever before. Employees increasingly expect their employers to offer mental health support. As GBA members recognize the critical link between employee well-being and overall productivity, discussions around managing stress and promoting mental health gain prominence. In this round table, we explore actionable approaches to empower employees and foster a healthier work environment.

### Most Important Takeaways to Share with GBA Members

1. **Communication:** In the past, there have been negative connotations around mental health support. It is important for management to encourage open communication with employees and give a clear path to support that is available. There is a significant difference between old and new practices. It should not be frowned upon to take a mental health day. Provide support services such as counseling for personal or work-related issues. It is important that the employees see this as a confidential option.
2. Provide flexible work arrangements such as remote work to reduce commute stress and provide a better work-life balance. Hybrid work structures – mandatory set number of days in office with an option for remote work the other days
3. Implement wellness programs that encourage healthy lifestyles. Offer incentives for reaching certain wellness goals such as exercise, healthy eating habits, annual check-ups, etc.

### Other Key Discussion Points

- Setting realistic deadlines and work hours
- Support from leadership comes from training managers on how to see signs of employee stress. Regular one-on-one meetings that aren't solely focused on performance. Make these meetings more frequent but shorter in duration. Employee needs to feel comfortable communicating with company leaders.
- Management must go through training programs that focus on employee well-being. Be up to date with current mental health support that is available.
- Some companies offer free counseling services
- Wellness apps such as Calm and Headspace are sometimes offered for free or at a discount to employees. Some companies are using HealthJoy to coordinate benefits and options in one place.
- Most insurances offer the use of Teladoc where people can schedule same-day mental health or other wellness appointments. Companies can encourage employees to take advantage of this.
- Important for companies to have more social events to bring remote workers, field staff, and office staff together.
- Encourage specific in-office days for team member engagement. For example: "Team Work Tuesday" where lunch is provided and everyone is encouraged to work from the office that day.

## THE ART OF NETWORKING – FOSTERING BENEFICIAL RELATIONSHIPS

### Abstract

One of the most valuable benefits of being a GBA member and attending conferences is the opportunity to network with peers from across North America. If done right, networking can be both enjoyable and rewarding. In this round table discussion, we explore innovative ways to transform networking into a positive and productive experience.

### Most Important Takeaways to Share with GBA Members

1. Mentorship is important to help develop others. Meeting beforehand and afterward. It would be beneficial for GBA to have a younger forum with a focus on local universities.
2. Be curious, be intentional, and focus on the long game.
3. Listen. Quality over quantity.

### Keys to Effective Networking

**Authenticity:** Be genuine in your interactions. Focus on forming meaningful connections rather than merely collecting contacts.

**Active Listening:** People want to feel seen and heard. Actively listen to others' needs and interests, offering help or support where possible.

**Consistency:** Take initiative. Be the one who makes the call, follows up, and sets up meetings.

**Long-Term Connections:** Prioritize building lasting relationships beyond immediate gains.

### Other Key Discussion Points

- Networking can help you be more well-rounded. Help you connect with people.
- Understanding someone else's story. Approach with an attitude of learning more.
- Make it about them
- Be a good listener.
- Debra Fine – The Fine Art of Small Talk
- Exchanging business cards is a first step, but then need to follow up! Help to connect with others. Relationships: Be intentional and make sure it is a two-way street.
- Value the relationship
- Networking could be more than just getting work but also learning more.
- Networking for younger people can feel difficult to 'break in'. Having someone more senior to help facilitate a conversation. Young professional groups. Having good mentors to help grow young individuals.
- Networking takes energy. Learn how to transition from one conversation to another.

## CLIMBING THE CORPORATE LADDER – CAREER ADVANCEMENT TIPS/STRATEGIES

### Abstract

Career advancement in any company requires a blend of skill, strategy, and resilience. In this round table, we explore actionable ideas to help professionals advance their careers while minimizing risks.

### Most Important Takeaways to Share with GBA Members

1. Everyone can be a leader. It is important to find your unique leadership style.
2. Be the utility player. Learn new skills and make it a priority to be available.
3. Set others up for success. Understand the concept of success through others. Build your succession plan so you can take on new tasks yourself and move up to the next level.

### Other Key Discussion Points

- You must show up. Be available and actively engaged.
- Always be willing to take on the tasks asked of you. Take on challenges and step outside your comfort zone. It is important to say yes even if your first thought is to say no. Mindset and attitude are important. How can you make it happen?
- Increase your knowledge. Find the skills that you do not have or need to work on and figure out how to get them or improve on them. Knowing who can help you is important.
- Make team members' jobs easier by finding ways to help. Be innovative.
- Learn how to develop relationships both in-person and in a virtual role.
- Seek out internal and external peer groups to talk to about your experiences, issues, and successes.
- Be a problem solver.
- Be an early adopter.
- Look at everyone like a partner.
- Be the President of your own company.



## LESSONS LEARNED: THINGS I WISH I COULD TELL MY 20-YEAR-OLD SELF

### Abstract

As we reflect on our life journey, there are invaluable insights we wish we could share with our younger selves. What are some lessons learned over the years that if we had known earlier, would have shaped our paths differently?

### Most Important Takeaways to Share with GBA Members

1. Hard work pays off.
2. Professional development /growth is important. Network early and often.
3. Clear and effective communication; be honest with people (especially as a manager/supervisor); do not be afraid to “hunt the zombies”; be slow to hire, quick to fire; clear is kind; public praise, private criticism. Practice patience and empathy. Allow people to fail around you as they will learn.

### Other Key Discussion Points

- Everything is important; things need to get done, and they will get done. It is OK to delegate and let someone else complete it even though it may not happen the way YOU would have done it, but not necessarily worth “stressing” over it.
- Hard work pays off and gets rewarded. Be patient.
- When opportunities present themselves, take them; remember that the grass isn’t always greener on the other side.
- Be honest with people.
- Advocate for yourself and speak up but be prepared to hear feedback.
- Build your network early and often; don’t wait until later in your career. In the end, this benefits your company, but it also benefits the individual as the network will last a lifetime. Get involved in committees, organizations, etc.
- Under promise and overdeliver.
- Delegate and ask for help. Strive for a work-life balance that works for you. Make sure you ask those you are delegating to if they understand the instructions. Have them tell you what they think they heard.
- Professional development is important. Go for licensure and have a growth mindset (incremental improvements). Be humble when you are 20 and don’t think you know everything because you DON’T. Be coachable.

## THE BEST BOOKS TO NAVIGATE LIFE

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### Abstract

What is in your library? In this round table session, we will explore the wisdom shared by books that support our path through life. Let's share our library selections that provide practical advice, inspiration, entertainment, or a fresh perspective.

### Most Important Takeaways to Share with GBA Members

1. There are many GBA members who love to read and there appears to be an appetite for more GBA book recommendations.
2. GBA should consider a future book club.
3. GBA members are well read and read for many reasons including to learn and grow and just for enjoyment.

### Other Key Discussion Points

- There are many sources people use to find books that are recommended including websites such as Goodreads and direct recommendations from friends and colleagues (such as GBA President Guy Marcozzi, P.E., D.GE, LEED AP BD+C, who is rumored to have a great list). Other sources include The New York Times Book Review, Amazon Book Review, and recommendations from authors including Daniel Pink and Simon Sinek.
- The group leveraged all types of mediums to access content including actual physical books and electronic mediums such as Audible/Kindle which are convenient when reading on the go and for listening.

### Book List

**Shoe Dog: A Memoir by the Creator of Nike**  
Phil Knight

**Think Again: The Power of Knowing What You Don't Know**  
Adam Grant

**The Advice Trap: Be Humble, Stay Curious & Change the Way You Lead Forever**  
Michael Bungay Stanier

**Building A StoryBrand: Clarify Your Message So Customers Will Listen**  
Donald Miller

**The Coddling of the American Mind: How Good Intentions and Bad Ideas Are Setting Up a Generation for Failure**  
Jonathan Haidt, Greg Lukianoff, et al.

**In Harm's Way: The Sinking of the USS Indianapolis and the Extraordinary Story of Its Survivors**  
Doug Stanton

**The Spy and the Traitor: The Greatest Espionage Story of the Cold War**  
Ben Macintyre, John Lee, et al.

**The Checklist Manifesto: How to Get Things Right**  
Atul Gawande

**Thinking Fast and Slow**  
Daniel Kahneman

**The 7 Habits of Highly Effective People**  
Stephen R. Covey, Jim Collins, et al.

**Outlive: The Science and Art of Longevity**  
Peter Attia MD and Bill Gifford

**The Infinite Game**

Simon Sinek

**Into Thin Air: A Personal Account of the Mt. Everest Disaster**

Jon Krakauer

**The Rules of Management: A Definitive Code for Managerial Success (Richard Templar's Rules)**

Richard Templar

**Unreasonable Hospitality: The Remarkable Power of Giving People More Than They Expect**

Will Guidara

**Mindset: The New Psychology of Success**

Carol S. Dweck, Ph.D.

**Embrace the Suck: The Navy SEAL Way to an Extraordinary Life**

Brent Gleeson

**What Got You Here Won't Get You There: How Successful People Become Even More Successful**

Marshall Goldsmith and Mark Reiter

**How the Courage to Be Vulnerable Transforms the Way We Live, Love, Parent, and Lead**

Brené Brown

**Atlas of the Heart: Mapping Meaningful Connection and the Language of Human Experience**

Brené Brown

Books by Jeffrey Archer (Fiction)

Books by Patrick M. Lencioni (Non-Fiction)