

ROUND TABLE WRAP-UP

Topic: Baking Cakes and Throwing Parties: Creative retention initiatives to build a stronger team

TOPIC ABSTRACT

Employee retention is a critical challenge for organizations aiming to maintain a motivated and cohesive workforce. This round table will explore innovative retention strategies centered around fostering a positive and engaging workplace culture through creative initiatives. By organizing regular social events and team-building activities, companies can enhance employee satisfaction, strengthen interpersonal relationships, and create a sense of belonging.

Most important takeaways from the discussion to share with GBA members

1. Monthly lunch and learns, every 6 weeks a group that donates blood, Habitat for Humanity build, virtual golf tournament where winners get to give \$500 to a charity of their choice.
2. Conversation focused around out of office and in office activities that bring people together. Most companies have something like this (e.g. lunch and learns, Holiday party inviting family members and significant others and developing personal relationships is key.
 - a. Having personal relationships can help leverage difficult situations (e.g. employees will come to you before quitting)
 - b. Try giving things a personal touch (e.g. hand written)
 - c. Events may miss field people,
3. Thinking acknowledgements outside of parties (gift cards, spot rewards, birthday cards(handwritten!)) are good strategies.
4. Mentoring sessions with senior staff going to juniors
5. Senior engineers need to be invested for success

Concerns, advise solutions, lessons learned, or case histories related to this topic:

- Happy employees are productive employees. It pays for itself
- Full leadership buy-in is needed to create the desired culture
- Get involved, lead by example. Culture comes from top down.
- Can use employee surveys to measure the impact of culture-building

NEWSlog Summary

The round table discussion, *"Baking Cakes and Throwing Parties: Creative Retention Initiatives to Build a Stronger Team,"* held on April 25, 2025, focused on innovative and personal approaches to employee retention. Participants shared a variety of initiatives—ranging from social events and charitable activities to mentoring and personalized recognition—that help foster a sense of belonging and engagement within teams. The conversation emphasized that building strong interpersonal relationships and a positive culture can significantly improve employee satisfaction and reduce turnover.

Leaders highlighted the importance of both in-office and out-of-office activities, such as lunch and learns, volunteer events, and inclusive holiday parties. Personal touches like handwritten birthday cards and spot rewards were noted as meaningful gestures. The discussion also underscored the need for leadership buy-in and active participation to create a culture where employees feel valued and supported.

1. **Creative Engagement:** Activities like virtual golf tournaments, blood drives, and charity events not only build camaraderie but also give employees a sense of purpose.
2. **Personal Connections Matter:** Developing personal relationships through inclusive events and thoughtful gestures can help retain employees and foster trust.
3. **Recognition Beyond Parties:** Spot rewards, gift cards, and handwritten notes are simple yet powerful ways to acknowledge contributions.
4. **Mentorship and Leadership Involvement:** Senior staff mentoring junior employees and leading by example are essential for cultural success.
5. **Measure and Adapt:** Use employee surveys to assess the impact of retention initiatives and continuously improve them.

The discussion reinforced that happy, engaged employees are more productive and loyal. Investing in creative, personalized retention strategies—backed by leadership commitment—pays off in building a stronger, more cohesive team.

ROUND TABLE WRAP-UP

Topic: Best practices for the use of non-technical staff to alleviate PM overload

Topic Abstract

Project managers (PMs) often face significant workloads, particularly when balancing technical and non-technical responsibilities. This round table explores best practices for leveraging non-technical staff to alleviate PM overload by assigning them non-technical project management tasks. By involving non-geotechnical professionals in areas such as scheduling, documentation, communication, and administrative support, organizations can free up PMs to focus on core technical aspects of projects.

1. What specific non-technical tasks currently consume the most time for project managers - invoices, distributing DFRs, project setup, AR tracking/collections, certifications/compliance, financial tracking
2. What communication protocols should be established between PMs and non-technical staff to ensure accountability without micromanagement - repetition/iteration with constructive feedback.
3. What technology solutions or software platforms best facilitate collaboration between technical PMs and non-technical support staff? Loom - create how-to training videos, TrustLayer to track subcontractor compliance, Scribe - training.
4. What are the potential risks of delegating certain PM responsibilities, and how can these risks be mitigated? Low risk items, that can be "fixed". Bigger risk is burning out PMs. Hire right, people you trust and are accountable.
5. PMs maintain ownership but are given access to resources to help with non-technical responsibilities
6. Admins trained for reviewing reports/grammar. PMs responsible for technical report.
7. Create SOP's to guide non-technical helpers.
8. Teaching younger staff to "move the mail" and say no if overloaded.
9. Need to build trust for PMs to use help
10. More cost effective

Concerns, advise solutions, lessons learned, or case histories related to this topic:

1. Lots of technological solutions are available to reduce the impact of administrative tasks.
2. Many of the administrative tasks are low risk, so spending too much time worrying about getting it right is unnecessary, show them, have them do it and iterate with constructive feedback. Bigger risk is burning out the PMs
3. Tasks identified that could be handed to administrative staff includes - invoice review, distributing DFRs, project setup, AR tracking/collections, certifications/compliance tracking, financial tracking

NEWSlog Summary

This round table discussion focused on the non-technical responsibilities that often consume project managers' (PMs) time and how organizations can better support them through delegation, training, and technology. Tasks such as invoicing, distributing DFRs, project setup, AR tracking, compliance certifications, and financial monitoring were identified as major time drains. While these tasks are generally low-risk, they can lead to burnout if not properly delegated. Participants emphasized that PMs should retain ownership of projects but be supported by trained administrative staff and clear standard operating procedures (SOPs).

Effective communication protocols—centered on repetition, iteration, and constructive feedback—are essential to ensure accountability without micromanagement. Tools like Loom, TrustLayer, and Scribe were recommended for training and compliance tracking. Building trust between PMs and support staff, teaching junior employees to manage workload boundaries, and recognizing the cost-effectiveness of delegation were also key themes.

Key Takeaways

1. **Delegate Low-Risk Tasks:** Administrative duties like invoicing and compliance tracking can be offloaded to reduce PM workload and prevent burnout.
2. **Use SOPs and Training Tools:** SOPs and platforms like Loom and Scribe help standardize processes and train support staff effectively.
3. **Establish Clear Communication:** Constructive feedback and iterative learning build accountability without micromanagement.
4. **Build Trust and Ownership:** PMs must trust their support teams while maintaining project ownership and oversight.
5. **Cost-Effective Support:** Delegating administrative tasks to trained staff is more efficient and cost-effective than overloading PMs.

Wrap-Up

By strategically delegating non-technical responsibilities and investing in training, communication, and trust-building, organizations can enhance project efficiency and protect their project managers from burnout. This approach not only improves productivity but also supports long-term team sustainability.

ROUND TABLE WRAP-UP

Topic: Building a Brilliant Board of Directors: What is the right mix, and should I include outside directors?

Topic Abstract

The composition of a board of directors is crucial for the strategic direction and governance of an organization. This abstract explores the optimal mix of board members and the role of outside directors in enhancing board effectiveness.

1. External board members can provide valuable strategic insights, especially for companies in growth or transition phases.
2. Board composition should balance internal and external members to ensure both operational understanding and fresh perspectives.
3. Cost considerations are important—external advisors may cost around \$30,000 annually, but their strategic value can outweigh the expense.
4. Diverse skill sets, such as IT expertise, are increasingly important in modern board structures to address evolving business needs.
5. Clear role definitions between board members and operational management help prevent overlap and confusion.
6. Regular communication between the board and executive team is essential for alignment and effective governance.
7. Board training programs can enhance member effectiveness and ensure everyone understands their responsibilities.
8. Strategic planning benefits from diverse viewpoints, which external members are well-positioned to provide.
9. Evolving board structures reflect a shift from long-standing executive teams to more dynamic, skill-diverse boards.
10. Leadership should consider formalizing criteria for board member selection to align with long-term strategic goals.

NEWSlog Summary

The round table discussion focused on the evolving structure of corporate boards, emphasizing the strategic value of including external members. Participants shared that external board members can offer fresh perspectives and critical insights, particularly beneficial during periods of growth or organizational transition. While the financial investment—estimated at around \$30,000 annually—was acknowledged, many agreed that the long-term strategic benefits often justify the cost.

The conversation also highlighted the importance of building a balanced board with both internal and external members, ensuring a mix of operational knowledge and outside expertise. Key themes included the growing need for diverse skill sets such as IT, the importance of clearly defined roles between board and management, and the value of regular communication and training to enhance board effectiveness.

Key Takeaways

1. **External board members** bring strategic insights that are especially valuable during growth or transition phases.
2. **Balanced board composition** ensures both internal understanding and external perspective.
3. **Diverse expertise**, including technology skills, is increasingly essential for modern governance.
4. **Clear role definitions** between board and management prevent confusion and improve efficiency.
5. **Ongoing communication and training** are critical to maintaining an effective and aligned board.

Wrap-Up

As boards adapt to meet modern challenges, integrating external voices and diverse skills can significantly enhance strategic oversight and governance. With thoughtful structure and continuous development, boards can become more dynamic, effective, and aligned with long-term goals.

ROUND TABLE WRAP-UP

Topic: Creating a culture of innovation: Celebrating off the wall ideas that might propel our company forward

Topic Abstract

Fostering a culture of innovation is essential for organizations seeking to stay competitive and drive growth. This abstract explores the importance of celebrating unconventional and off-the-wall ideas as a means to propel the company forward. Encouraging employees to think creatively and take risks can lead to groundbreaking solutions and new opportunities.

1. Give a platform to be innovative and all inclusive-safe environment for all levels; never say "this won't work"; be open to crazy ideas
2. Monetary incentives for thinking outside the box; submit proposals (show ROI)
3. Give some runway for exploring new ideas – allow failure- it is OK! Some of the best ideas come from failure. Question them and allow them the space to run with it
4. Find the value in the non-chargeable hour; we're too focused on how we spend our time; billable/non-billable; free minds, doesn't need to be a negative when spending time on ideas; consider setting up a project code so it doesn't show up as non-billable
5. There is an ROI to some new/good ideas (what, why, cost, how to monetize) Present case.
6. Give space for people to go out in the world (conferences, universities, others) to get ideas and bring them back to the company to implement something new; submit idea into system that gets selected and reward them.
7. Read "Orbiting the Giant Hairball"

Concerns, advise solutions, lessons learned, or case histories related to this topic:

1. Creating a safe environment/runway for experimentation/innovation/thinking outside the box; create project codes for this time so it is tracked. Run it like a project (Scope, Schedule, Budget)
2. Incentivizing in some way, those who present a valid case (business plan, why, how, ROI). Monetary and company-wide recognition – celebrate ideas – both the wins and the failures
3. Encourage exploration of new ideas/for going outside the company and participating in conferences, visiting universities, doing research). It is ok to spend this time.

NEWSlog Summary

This round table discussion focused on cultivating a culture of innovation by creating a safe, inclusive environment where employees at all levels feel empowered to share and explore new

ideas. Participants emphasized the importance of encouraging creativity without fear of failure, supporting experimentation with time and resources, and recognizing both successful and unsuccessful efforts. A key theme was shifting the mindset around non-billable time, viewing it as an investment in innovation rather than a loss of productivity.

To support this culture, organizations are encouraged to implement systems that track innovative efforts like formal projects, complete with scope, schedule, and budget. Incentives such as monetary rewards, recognition, and opportunities to attend conferences or collaborate with external institutions were highlighted as effective motivators. The group also stressed the importance of presenting ideas with a clear business case, including ROI, to gain leadership support and drive implementation.

Key Takeaways

1. **Create a Safe Space for Innovation:** Encourage all ideas—no matter how unconventional—and avoid dismissive language like “this won’t work.”
2. **Reward Creativity:** Offer monetary incentives and recognition for ideas that demonstrate potential value and ROI.
3. **Allow Time to Explore:** Allocate time and resources for experimentation, and treat innovation like a formal project with structure and accountability.
4. **Rethink Non-Billable Time:** View time spent on idea generation as a strategic investment, not a productivity loss.
5. **Encourage External Inspiration:** Support employees in attending conferences, visiting universities, and bringing back fresh ideas to implement internally.

Wrap-Up

Fostering innovation requires more than just good ideas—it demands a culture that values curiosity, supports risk-taking, and celebrates both success and failure. With the right structure and encouragement, organizations can unlock creative potential across all levels.

ROUND TABLE WRAP-UP

Topic: ERP Tools: Which is better/best?

Topic Abstract

Enterprise Resource Planning (ERP) tools are essential for integrating and managing various business processes within an organization. This discussion explores the criteria for evaluating and selecting the best ERP tools to meet specific organizational needs. Key factors include functionality, scalability, ease of use, customization options, and cost-effectiveness.

1. Participants reported using Deltek Vantagepoint or BST11 (medium sized firms), Oracle Cloud (large firm) and Acumatica (small firm). Participants with no ERP ranged in firm size from 50 to 350 people.
2. Establish must haves, nice to haves and develop roadmap for all features at onset of project. Confirm needs assessment matches application's capabilities before signing contract.
3. Create a deployment team consisting of a project champion (senior leader). Clearly define key staff responsible for roll out and testing of specific modules / components.
4. Invest in training. Make sure clear and accessible training resources are available during roll out to staff. Establish power users who are well-versed on using the software to aid their peers.
5. Once a product is selected, as much as possible, change your business practices to suit the software and avoid customizing the software to suit unusual business practices. Take the opportunity to standardize processes and gain efficiencies.
6. Data quality and structure is really important. Avoid creating custom fields of data, that might not be able to migrate to a different ERP or newer version in the future.
7. Before going live with the product or specific modules or features, perform thorough testing in a sandbox environment.
8. Some firms preferred using multiple point solutions connected by API's. Downside is the API's can stop working if one product updates, and can create endless disruptions in service.
9. CRM and quoting functions were not reported to be widely used by participants.

Concerns, advise solutions, lessons learned, or case histories related to this topic:

1. Firms starting their ERP journey should expect a couple years of troubleshooting to meet minimum requirements, and another couple years to get their "nice to have" features working. Firms using ERP reported improved invoice accuracy, lower financial administration labor costs and shorter time pay once ERP functions are working smoothly

NEWSlog Summary

This round table discussion focused on the implementation and optimization of ERP systems across firms of varying sizes. Participants reported using platforms such as Deltek Vantagepoint, BST11, Oracle Cloud, and Acumatica, while some firms with up to 350 employees still operated without an ERP. A key theme was the importance of thorough planning—starting with a clear roadmap of “must-have” and “nice-to-have” features, aligning business needs with software capabilities, and assembling a dedicated deployment team led by a senior project champion.

Training and change management were emphasized as critical to success. Firms were encouraged to invest in accessible training resources, designate power users, and avoid over-customizing software to fit outdated or niche business practices. Data quality, sandbox testing, and minimizing custom fields were also highlighted as essential for long-term scalability. While some firms used multiple point solutions connected by APIs, this approach was noted to carry risks of instability. Overall, participants acknowledged that ERP implementation is a multi-year journey but one that ultimately improves efficiency, accuracy, and financial performance.

Key Takeaways

1. **Plan Thoroughly:** Define essential and desirable features early, and ensure the ERP system aligns with your firm’s needs before committing.
2. **Build a Strong Deployment Team:** Include a senior leader as project champion and assign clear roles for rollout and testing.
3. **Prioritize Training:** Provide accessible training and establish power users to support peers during and after implementation.
4. **Standardize, Don’t Customize:** Adapt business practices to the software to avoid costly and complex customizations.
5. **Expect a Long-Term Commitment:** ERP success takes years—initial troubleshooting followed by gradual rollout of advanced features.

Wrap-Up

ERP implementation is a significant but rewarding investment. With careful planning, strong leadership, and a commitment to training and standardization, firms can streamline operations and unlock long-term efficiencies.

ROUND TABLE WRAP-UP

Topic: Help! What is my role as a mentor? best practices that bring out the best in mentees.

Topic Abstract

Mentorship plays a pivotal role in personal and professional development, yet many mentors often question their responsibilities and how to effectively support their mentees. This round table discussion provides an overview of the mentor's role and shares best practices to maximize the potential of mentees while highlighting the importance of continuous learning and adaptability in mentorship, ensuring that both mentors and mentees grow and succeed together.

1. There's a GBA Best Practice on establishing a mentorship program.
2. Set an objective for the program; setup guidelines; there are several models to follow but should work for your company
3. Buy-in at all levels – must be funded/budgeted
4. Mentorship is important at all levels (even those close to retirement)
5. Pair mentor/mentee based on level (and career path) and cannot be related in the organization; mentee must have a say and best if paired organically; limit # of mentees that a specific mentor can have. (2?)
6. Mentee should drive the bus (scheduling, etc)
7. "What can I do to make your life easier?" – work/life can be within the limits
8. Reverse mentoring is important – the mentor can learn just as much from the mentee and maybe even more.
9. Sharing skills with geotechnical engineers that aren't taught in school is important (IT skills/programming)
10. Training program or class for the mentor

NEWSlog Summary

The discussion focused on the development and implementation of effective mentorship programs within organizations, emphasizing the importance of structure, inclusivity, and mutual growth. Participants referenced the GBA Best Practice as a foundational guide and stressed the need to tailor mentorship models to fit each company's culture and goals. Key elements include setting clear objectives, securing organizational buy-in, and ensuring the program is adequately funded.

Mentorship was recognized as valuable at all career stages, including for those nearing retirement. Best practices include pairing mentors and mentees based on career paths (avoiding direct reporting relationships), allowing mentees to take the lead in scheduling, and limiting the

number of mentees per mentor. The concept of reverse mentoring was also highlighted, where mentors can learn from mentees, especially in areas like technology and programming. Training for mentors was recommended to ensure they are equipped to guide effectively.

Key Takeaways

1. **Structured Planning:** Set clear objectives and guidelines tailored to your organization's needs, using existing best practices as a foundation.
2. **Inclusive Participation:** Mentorship should be available at all levels, including senior staff, with thoughtful pairing and mentee involvement in the process.
3. **Organizational Support:** Programs must be budgeted and supported by leadership to be successful.
4. **Reverse Mentoring:** Encouraging two-way learning can enhance the experience for both mentor and mentee.
5. **Mentor Preparation:** Providing training or classes for mentors ensures they are equipped to support mentees effectively.

Wrap-Up

A well-designed mentorship program can foster professional growth, strengthen organizational culture, and promote knowledge sharing across generations. With thoughtful planning and support, mentorship becomes a powerful tool for long-term success.

ROUND TABLE WRAP-UP

Topic: How to engage staff that is workplace diverse. (ie., in office, full remote, hybrid)

Topic Abstract

Engaging a diverse workforce that includes in-office, fully remote, and hybrid employees present unique challenges and opportunities for organizations. This discussion will explore strategies to foster engagement across different work arrangements, ensuring all employees feel connected and valued. Key approaches include leveraging technology to facilitate seamless communication and collaboration, creating inclusive policies that address the needs of all work modes, and promoting a culture of flexibility and trust.

1. Employee engagement means employees are actively communicating, engaging in real meaningful conversation at both a personal and professional level.
2. The firms that have strong sense of community or strong relationships tend to want to work in an office as opposed to being fully remote.
3. How do we ensure different work arrangements feel equally valued? Communication, communication, communication.
4. When office/hybrid/remote employees need to be involved, consider meeting that includes everyone one Microsoft teams/google meet. Keep cameras on for the meetings!
5. Virtual happy hours have not been very successful to engage hybrid/remote staff. Can be awkward waiting for people to talk / participate
6. Mentorship with remote employees can be done but is difficult and takes great communication, planning and commitment from both the mentor and mentee, whereas mentorship of office employees tends to be more organic and spontaneous.
7. Provide financial support for fully remote employees to attend significant company events, such as holiday party or company anniversary party.
8. A significant majority of workers express a preference for flexible work arrangements, with 54% desiring fully remote positions and 41% favoring hybrid schedules. Only 5% prefer working in the office full-time U.S. Career Institute.

Concerns, advise solutions, lessons learned, or case histories related to this topic:

1. Employee Preferences & Engagement: The majority of workers prefer flexible work arrangements, with hybrid and remote employees reporting higher engagement levels than their in-office counterparts, though remote work can present challenges like time management and cultural disconnect.
2. Risks & Retention: Companies risk losing talent if they don't offer flexible work options, highlighting the strategic importance of adapting HR and operational policies to support diverse work modes equally.
3. Key Focus Areas for Leaders: To foster engagement across hybrid, remote, and field-based teams, organizations must prioritize inclusive communication, intentional

leadership, cultural connection, and equitable access to growth and recognition opportunities.

NEWSlog Summary

The discussion centered on how to foster meaningful employee engagement across varying work arrangements—remote, hybrid, and in-office. Participants emphasized that true engagement goes beyond task completion and includes authentic communication and relationship-building at both personal and professional levels. Companies with strong internal communities often see more willingness to work in-office, but the majority of employees still prefer flexible arrangements, with 95% favoring either remote or hybrid models.

To ensure all employees feel equally valued, communication must be intentional and inclusive. Strategies include using virtual meeting platforms with cameras on, offering financial support for remote staff to attend key events, and recognizing the challenges of remote mentorship. While virtual happy hours have had limited success, structured mentorship and leadership-driven cultural initiatives can help bridge the engagement gap.

Key Takeaways

1. **Flexibility is Key:** 95% of employees prefer remote or hybrid work, making flexible policies essential for retention and engagement.
2. **Inclusive Communication:** Consistent, transparent communication across all work modes is critical to ensure everyone feels equally valued.
3. **Remote Mentorship Takes Effort:** While possible, it requires planning, commitment, and strong communication to be effective.
4. **Support Remote Participation:** Financially supporting remote employees to attend major events helps build connection and inclusion.
5. **Leadership Must Be Intentional:** Leaders should focus on cultural connection, equitable recognition, and inclusive engagement strategies

Wrap-Up

As flexible work becomes the norm, organizations must evolve their engagement strategies to ensure all employees—regardless of location—feel connected, supported, and valued. With thoughtful leadership and inclusive practices, companies can build strong, resilient cultures across any work model.

ROUND TABLE WRAP-UP

Topic: Remote Work Incentives vs Training Employees & Managers

Topic Abstract

Increasing demand for remote or hybrid work accommodation creates tension with the need to integrate and upskill employees and makes managing more complex as well. How can GBA firms attract much-needed talent without setting themselves and new hires, up for disaster?

1. Pretty much everyone asks to work remote, so be ready to answer with what can be flexible or hybrid and what can't. (Position specific)
2. Best practice: Start people off in person so they can learn, build trust and relationships and gain mentorship. Work up to 3 out of office and 2 days in office. Say things like "we want to make sure we are giving you the skills and connections you need to be successful".
3. Best practice: one "all in" day per week to maintain company culture.
4. When you do need to accommodate meeting staff needs, spell out your perceived downsides/concern and work with employee to problem solve.
5. Best practice to get the more tenured employees, coaches, mentors, to weigh in on topics that can and cannot be taught remotely.
6. Best practice: As flexibility increases, communication must also increase.
7. Frequency of communication needs to be structured.
8. Easier to get people together virtually – disparate locations.
9. Virtual Interviews: Good for screening, but still need to meet in person.
10. Younger staff advance faster if they are in the office.

Concerns, advise solutions, lessons learned, or case histories related to this topic:

1. Young people have different perspectives
2. Need structured policies, communication & training
3. Flexibility is seen as a benefit

NEWSlog Summary

This round table discussion focused on navigating remote and hybrid work environments, particularly how to balance flexibility with productivity, mentorship, and company culture. As remote work becomes a common request, leaders are encouraged to clearly define which roles

can accommodate flexibility and which require in-person presence. A phased approach—starting new hires in person to build trust and gradually transitioning to hybrid models—was highlighted as a best practice. Maintaining strong communication and structured policies is essential to ensure that flexibility does not compromise collaboration or development.

The group emphasized the importance of intentional in-office time, such as one “all-in” day per week, and the need for senior staff to help determine what skills can be effectively taught remotely. Virtual tools are useful for initial interviews and connecting dispersed teams, but in-person engagement remains critical for growth, especially for younger employees. Flexibility is seen as a valuable benefit, but it must be supported by clear expectations and consistent communication.

Key Takeaways

1. **Define Flexibility by Role:** Be prepared to explain which positions can be hybrid or remote and which require in-person work.
2. **Start In-Person, Then Transition:** Begin new hires in the office to build relationships and trust, then move toward a hybrid schedule.
3. **Maintain Culture with Structure:** Designate one in-office day per week and ensure communication frequency increases with flexibility.
4. **Leverage Senior Insight:** Involve experienced staff in determining what can be effectively taught or managed remotely.
5. **Flexibility Requires Policy:** Clear, structured communication and training policies are essential to support a flexible work environment.

Wrap-Up

As remote work becomes more normalized, organizations must strike a balance between flexibility and the foundational elements of mentorship, culture, and communication. With thoughtful planning and leadership involvement, hybrid models can support both employee satisfaction and organizational success.

ROUND TABLE WRAP-UP

Topic: Skillset gaps of graduating/entry level engineers

Topic Abstract

As the engineering industry evolves, the skillset gaps of graduating and entry-level engineers have become a critical concern for employers. The discussion will explore the root causes of these gaps, including the disparity between academic curricula and industry requirements. Additionally, the round table will highlight strategies for bridging these gaps, such as enhanced internship programs, industry-academia collaborations, and targeted training initiatives.

1. Internships can solve some of the most common gaps: professional/argot/jargon, basic courtesy/professionalism follow through/ownership.
2. Written and verbal Communication skills are essential and seem under-emphasized in academia. Calling people and having confidence on the phone is important. Lobby for change. Or go teach! Equip more mid-level professionals to teach.
3. Skill gaps can create capacity issues. Teach mid-career professionals how to teach. Great development for them too.
4. Institute regular one-on one coaching. And focus on that person's gaps. Build confidence! Demonstrate investment.
5. Do proactive teach about client interface, adverse client exchanges. (don't wait for it to go wrong. Use GBA resources.)
6. Professional/Workplace – Expectation of regular promotions and title changes in a more expedited manor than is industry standard (impatient)
7. Technical skills – Poor grammar and technical writing skills
8. Other soft skills that are important: Time management, underestimating tasks, multiple priorities, varying deadlines. Understanding the big picture of a project.
9. Too much procedural training.
10. Professional/Workplace – Understanding funding, procurement, RFPs, RFIs, RFQs and regulatory compliance at Federal and State levels

Concerns, advise solutions, lessons learned, or case histories related to this topic:

1. Communication – Not picking up the phone and talking to clients/project team members
2. Situational Awareness in Field and Office: Natural curiosity and thinking for themselves (solution before time)
3. Understanding General Business Terminology – better if they participated in co-op/internship; Wanting to do everything and learning what is needed in the company.
4. Team work & one person doing most of the work in school & if they were not the "one" do-er on the team, they struggle in the company; Communication training; Technical writing frustrations w/ report writing for all technical disciplines.

NEWSlog Summary

This round table discussion focused on identifying and addressing common skill gaps in early-career professionals, particularly those entering technical fields. Participants emphasized that internships are a powerful tool for bridging gaps in professionalism, communication, and workplace expectations. Written and verbal communication skills, especially phone confidence and technical writing—were noted as underdeveloped in many new hires, often due to limited emphasis in academic settings.

To address these challenges, firms are encouraged to implement structured one-on-one coaching, proactive client interaction training, and development opportunities for mid-career professionals to become effective mentors. Soft skills such as time management, situational awareness, and understanding of the broader business context (e.g., RFPs, procurement, regulatory compliance) were also highlighted as critical areas for growth. The group agreed that building confidence and providing real-world exposure are key to long-term professional development.

Key Takeaways

1. **Internships Are Essential:** They help bridge gaps in professionalism, communication, and business terminology.
2. **Communication Skills Need Emphasis:** Encourage phone use, verbal confidence, and technical writing early and often.
3. **Mid-Level Staff Should Be Trained to Teach:** Developing teaching skills in mid-career professionals benefits both mentors and mentees.
4. **Coaching Builds Confidence:** Regular one-on-one coaching focused on individual gaps demonstrates investment and accelerates growth.
5. **Teach the Business Context:** Early exposure to client interactions, procurement processes, and regulatory frameworks is crucial.

Wrap-Up

Closing skill gaps in early-career professionals requires a proactive, structured approach that combines mentorship, real-world exposure, and communication training. By investing in both new and mid-level staff, firms can build stronger, more confident teams prepared for long-term success.



ROUND TABLE WRAP-UP

Topic: **The AI Driven Leader: Harnessing AI to make Faster, Smarter Decisions**

Date: **Friday, April 25, 2025**

TOPIC ABSTRACT

In today's rapidly evolving business landscape, the integration of artificial intelligence (AI) into leadership practices is transforming decision-making processes. This discussion will explore how AI-driven leaders leverage advanced technologies to enhance their strategic capabilities, enabling them to make faster and more informed decisions. By harnessing AI, leaders can analyze vast amounts of data in real-time, identify patterns, and predict future trends with unprecedented accuracy.

Most important takeaways from the discussion to share with GBA members

1. If AI makes us more efficient, how do we charge, rather than by the hour, to realize its value in our work.
2. Harrison Assessment used. Put into AI to provide feedback on employees to see where they may benefit, their strengths and weaknesses. AI can tend to "agree" with you.
3. Used to research companies, locations, presidents, revenues, etc. to create diverse groupings/pairings. Then asked to "interview" you. Lesson – Saved a lot of time, scrutiny helps to provide extra value.
4. People management – Using it for notetaking, following up for action items, summarize and transcribe entire meeting.
5. Internal surveys are used. Could be used to provide improvements/insights. ChatGPT also used to create the survey. Also, can help read the results.
6. Can use it for contract review, summarize issues, and provide recommendations. Other use cases: python/programming, marketing.
7. Currently used for routine tasks, such as email improvement. Should have caution around the results even with simple tasks such as counting items, calendars, etc.
8. Concerns regarding open and closed systems.
9. Contract review is a time saver, but legal teams need to still review. Using AI to augment, rather than replace professional judgement.

10. Models being used by member firms: Grok, Claude, ChatGPT, DocJuris (legal specific), Perplexity, X AI

Concerns, advise solutions, lessons learned, or case histories related to this topic:

- Publicly available language models (be careful with data and it's reliability)
- Leverage AI to minimize routine task to allow for more thinking
- Can be used to research strategic planning, other companies, geographies, etc.
- Can GBA develop a sample AI policy document?
- AI use in companies may be limited due to cost/licensing

NEWSlog Summary

As part of the 2025 GBA Annual Conference, the Business Practices Committee hosted the ever-popular business round table sessions where conference attendees discussed twelve important topics relevant to the geoprofessions.

The round table discussion, *"The AI Driven Leader: Harnessing AI to Make Faster, Smarter Decisions,"* held on April 25, 2025, explored how leaders are integrating AI into their strategic and operational workflows. Participants shared real-world applications of AI in leadership, from enhancing decision-making and streamlining administrative tasks to improving people management and contract analysis. The conversation emphasized the importance of using AI to augment human judgment rather than replace it, while also highlighting the need for caution around data reliability and system transparency.

Leaders are increasingly leveraging AI tools like ChatGPT, Claude, Grok, and DocJuris to automate routine tasks, conduct strategic research, and generate insights from internal data. However, concerns around open vs. closed systems, data privacy, and the cost of AI adoption were also discussed. The group considered the potential for GBA to develop a standardized AI policy to guide ethical and effective use across member organizations.

Key Takeaways

1. **Value-Based Pricing Models:** As AI increases efficiency, firms may need to shift from hourly billing to value-based pricing to reflect the true impact of AI-enhanced work.
2. **AI in Talent Management:** Tools like Harrison Assessments integrated with AI can provide nuanced feedback on employee strengths and development areas, though bias and over-alignment with user input remain concerns.

3. **Operational Efficiency:** AI is being used to automate tasks such as meeting transcription, contract review, and internal surveys—saving time and improving follow-through.
4. **Strategic Research and Planning:** AI supports deep research into companies, markets, and geographies, enabling more informed strategic decisions and diverse team formation.
5. **Ethical and Practical Considerations:** While AI offers significant benefits, leaders must remain cautious about data reliability, system openness, and the need for human oversight in critical decisions.

The discussion underscored that AI is a powerful tool for modern leaders, offering speed, insight, and efficiency. However, its successful integration depends on thoughtful implementation, ethical considerations, and a clear understanding of its limitations. As AI continues to evolve, organizations like GBA have an opportunity to lead by example in shaping responsible AI use policies.

ROUND TABLE WRAP-UP

Topic: Outsourcing: When does it make sense to delegate to an external resource? (i.e., accounting, collections, HR, IT)

Topic Abstract

Outsourcing has become a strategic tool for organizations seeking to optimize efficiency and focus on core competencies. This discussion will explore the considerations and benefits of delegating various functions, such as accounting, collections, human resources, and IT, to external resources. Key factors in the decision-making process include cost-effectiveness, access to specialized expertise, scalability, and the ability to streamline operations. By outsourcing non-core activities, companies can allocate more resources to strategic initiatives and innovation.

1. If it is something that you don't understand then outsource it.
2. For accounting hire different firms for taxes, payroll, bookkeeping and auditing.
3. Consider outsourcing for portions of your firm but not all, if that would be best.
4. Outsourced services are easier to scale than in house.
5. Outsourcing is more reliable than in house services.
6. Just because you have a service in house does not mean they will be more responsive.
7. Consider outsourcing some of the billable services you provide: lab, welding inspection, drilling.
8. Works very well for small to midsize firms.
9. Allows greater access to specialized expertise in HR, legal & accounting.
10. Ask other firms for recommendations on what firms to hire.

NEWSlog Summary

This round table discussion explored the strategic advantages of outsourcing non-core business functions such as accounting, collections, HR, and IT. Participants emphasized that outsourcing can enhance efficiency, provide access to specialized expertise, and allow companies, especially small to midsize firms, to scale operations more easily. By delegating tasks that fall outside their core competencies, organizations can focus more resources on innovation and strategic growth.

The group discussed practical considerations, such as selectively outsourcing specific services (e.g., payroll, auditing, or even billable services like lab work or drilling) rather than entire departments. Outsourcing was noted to often be more reliable and responsive than in-house services, and participants encouraged firms to seek recommendations from peers when selecting vendors. The consensus was that outsourcing is not just a cost-saving measure but a strategic enabler for long-term success.

Key Takeaways

1. **Outsource What You Don't Understand:** Delegating unfamiliar or complex functions ensures quality and reduces risk.
2. **Specialize Your Vendors:** Use different firms for specific accounting needs like taxes, payroll, and auditing to maximize expertise.
3. **Scalability and Reliability:** Outsourced services are often easier to scale and more dependable than internal teams.
4. **Strategic Partial Outsourcing:** Consider outsourcing only parts of a function or even some billable services to optimize operations.
5. **Leverage Peer Insights:** Ask other firms for vendor recommendations to find trusted and proven service providers.

Wrap-Up

Outsourcing is more than a cost-cutting tactic—it's a strategic decision that can unlock efficiency, expertise, and growth potential. With thoughtful implementation, it can empower firms to focus on what they do best while leaving specialized tasks to trusted partners.