

# A|E|C STRATEGIC PLANNING SERVICES

YOUR ROADMAP TO SUCCESS

Is *your* A/E/C firm on the road to sustained growth and profitability?

By envisioning a destination, establishing milestones, and driving a singular firm-wide commitment to getting there, senior facilitators with **PSMJ Resources' Strategic Planning Services** have helped hundreds of architecture, engineering, and construction firms transition from middle of the pack to market leader.

**Working together, we can do the same for yours.  
Let's talk about getting you on the road to success.**

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# SIGNS YOUR FIRM NEEDS A STRATEGIC PLAN NOW!

- Your firm grew too much too fast—and you've hit a wall
- A new generation of employees is asking where your firm is heading—and you're not sure how to answer
- The owner plans to step down—and no one is prepared to fill that void
- You can't answer the question: *"What should our firm look like in five years?"*
- You want to grow into new geographic markets—but don't have data to support smart choices
- Your firm's communication structure struggles to clarify goals and expectations
- You plan on selling your firm—but don't know when or how
- You want to add new services—but aren't sure of the risks and rewards
- Job roles are not defined—and your best employees are risking burn-out
- You merged with another firm—but the pieces aren't aligning as expected
- Your strategic plan is over five years old—and doesn't work in current markets
- You've never crafted a strategic plan—and wonder why you struggle to stay profitable

## WHY PSMJ STRATEGIC PLANNING SERVICES?

**A/E/C industry experts**—At PSMJ Resources, the A/E/C industry isn't just another client sector; it's our only business focus.

**More than three decades of strategic planning advisory experience**—For over 30 years, our deep roots in the design and planning industry have helped hundreds of A/E/C firms plan for strong, lasting growth.

**Consultants that bring real-world experience**—PSMJ consultants have successfully managed top design and engineering firms and deliver proven advice and real-world solutions.

**Industry-leading benchmarking data**—PSMJ financial performance and compensation surveys have the highest participation rate and provide comprehensive results, so that your strategic plan is built on accurate, defensible data.

**Exclusive industry insights**—PSMJ researchers track A/E/C quarterly results by specific markets and submarkets, generating the most current business forecasting intelligence and allowing us to align recommendations with both near and long-term realities.

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# PSMJ'S PROVEN A/E/C STRATEGIC PLANNING PROCESS IS YOUR SUCCESS ROADMAP

An effective strategic plan describes where your firm wants to go and how it will gain competitive advantage by capitalizing on unique capabilities. So, what should your path to success look like? Engaging PSMJ to consult on strategic planning means positioning your firm for strong, lasting growth and profitability. Working together, we craft your map by turning questions into manageable actions:

## Where are we now?

- Establish your firm's current and future service lines, business units, and market sectors
- Define unique strengths relative to markets and competition
- Clarify your firm's weaknesses and uncover ways to minimize their impact

## What do we want to become?

- Develop a holistic vision for the future that aligns with your mission, values, market, and timeframe
- Build a team-based, goal-oriented plan through a participative process

## What will we do to get there?

- Craft specific, measurable, attainable, and time-based milestones to mark your path to success
- Install systems that ensure firm-wide accountability, follow-through, and buy-in, the lack of which is the biggest obstacle to realizing your plan's promise
- Identify the right metrics for gauging progress

By the end of your retreat, your team will be able to answer these questions and have a list of trackable action items in place to ensure successful Strategic Plan execution.

**PSMJ experts have successfully facilitated strategic planning at many of the most successful A/E/C firms, including...**



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**AND HUNDREDS MORE**

# STREAMLINED APPROACH

The classic 12-step strategic planning approach taught in business schools is far too generic, slow, and costly for today's A/E/C firms. PSMJ's proven process—developed and fine-tuned over many years and through hundreds of engagements—is nimble, flexible, and tailored to the unique challenges of architecture, engineering, and construction firms. It cuts to the heart of issues to put a superior plan in place faster, starting with research and preparation, leading to a facilitated strategic planning retreat, and followed by plan implementation assistance.

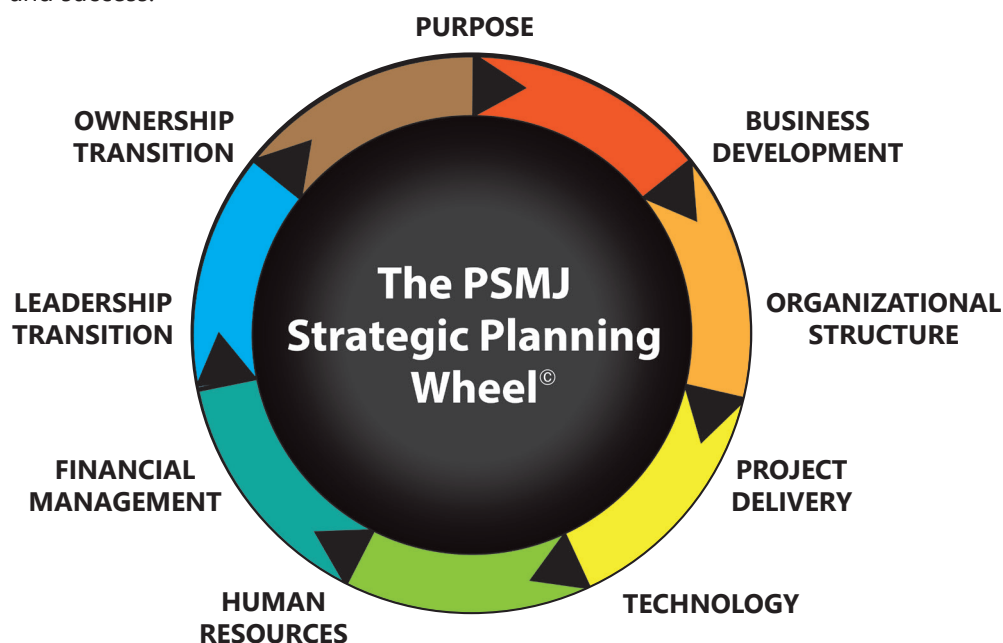
## BEFORE YOUR STRATEGIC PLANNING RETREAT

PSMJ starts by asking your firm's principals, employees, and clients fundamental questions about where your firm is now and benchmarking the results using our industry-best databases. While financial metrics are a key consideration in the preparation process, we also dive deep into issues of culture, organizational structure, mission, opportunities, and perceived strengths and weaknesses.

## THE RETREAT

Over the course of two intensive and eye-opening days, your facilitator engages you and other key decision makers in the plan development process, following an efficient agenda targeting topics from the Strategic Planning Wheel that you identify prior to the retreat. With help from your facilitator, your team develops a list of strategic goals that address high-priority concerns, strategies to achieve those goals, and an Action Plan that creates accountability.

You emerge with a comprehensive, realistic, and data-backed map to growth and success.



## AFTER YOUR STRATEGIC PLANNING RETREAT

To increase the chances of the plan being implemented, you benefit from follow-up consultation access for a year after the retreat—including facilitation of update meetings, unlimited phone and email support, and use of PSMJ's *Financial Benchmarking Tool* to run various scenarios.





## PRE-RETREAT

- Management Survey
- Employee Survey
- Client Feedback Survey
- Financial Benchmarking
- Management Interviews
- Pre-Retreat Meeting

## THE RETREAT

- Review Firm's Culture and Vision
- Establish Strategic Goals
- Develop Strategies to Achieve Strategic Goals
- Create an Action Plan
- Establish Year-by-Year Goals

## POST-RETREAT

- Strategic Plan Report
- Quarterly Follow-Up Meetings
- Implementation Support

*"It's tough to herd cats, even harder when they are smart. PSMJ did a masterful job. Everyone was energetic and engaged throughout and it exceeded our expectations. The facilitation was great."*

**Monica Wagner, M.E., P.E., Vice President / CEA Engineering Group**

*"Our association with PSMJ has transformed our company. Their insight and expertise are really unparalleled. Tangible plans, tangible metrics, and tangible results. We would not consider anyone else when it comes to sustaining and/or growing our business and our business practices."*

**Sam Dawson, P.E., CEO / Pape-Dawson Engineers**

*"I really enjoy working with PSMJ. They understand the dynamics of people and our specific needs. PSMJ really is part of the Great West Team."*

**Daniel M. McCauley, P.E., President Emeritus / Great West Engineering**

# MEET OUR STRATEGIC PLANNING CONSULTANTS



**Dave Burstein, P.E.** has more than 30 years of design firm experience in a variety of management positions, including president of a 100-person planning company and a 1,800-person engineering company. Since joining PSMJ, he has facilitated strategic planning retreats for over 100 A/E/C firms ranging from fewer than 10 employees to more than 1,000.



**Jay McRae, P.E., MBA** has gained extensive experience in strategy development and implementation, business development, operations, and project management during his 35-year career in the engineering and construction industry.



**Bill Hinsley** brings more than 20 years of experience in strategic planning. He has led internal and external strategic planning and has spearheaded \$1 million to \$11 billion projects. His strategic planning areas of expertise include internal and external transitions, post-M&A strategic planning, and creating new business lines.



**Brian Burnett, P.E.** was directly responsible for leading his previous firm's strategic planning initiatives and was involved with major leadership transitions before joining PSMJ. Brian's diverse experience in business development, strategic planning, leadership development, and internal transitions specifically in the A/E/C space provides him with a unique perspective to assist PSMJ's clients.



**Denis Beaudin, P.E., LEED AP** spent over 20 years leading his MEP firm, where he was directly responsible for strategic planning, leadership development, branch office optimization, and internal transitions.

## LET'S GET STARTED

For more information about how PSMJ Resources' facilitated Strategic Planning Services can put your firm on the right path to sustained growth and increased profitability, contact Betty Elrod at the following:



CALL:  
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