

**Note:** *Should you have questions or comments about any particular question in the survey, please refer to the question by its alpha-numeric label (e.g. FP1) when contacting our independent research partner, CMG (research@cmgconsulting.com). You may note that some of these labels are not in numerical order – this is deliberate and is a result of changes to question order and survey content over the 42-year history of the study, so please ensure that you are referring to the correct label.*

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Welcome to the 42nd Annual Deltek Clarity Architecture & Engineering Industry Study. This study provides you with key performance indicators and in-depth industry analysis to help benchmark your company and improve results within key areas of your business.

You are invited to participate because of your company's position within the A&E market and your knowledge of key topics covered in the survey. You will be asked about your firm's processes, challenges, and growth areas related to specific business functions and can fill out only the sections most appropriate to your role:

- Financial Management
- Business Development
- Project Management
- Human Capital Management
- Technology Trends

As a participant in this year's Clarity study, you will receive early access to the survey findings and be provided a custom scorecard benchmarking your company against other A&E companies in the survey. Your participation is completely voluntary, and your responses will be kept private and confidential.

If you would like to review the questions in advance of starting the survey, please click to download a PDF of the survey: [Deltek Clarity A&E Survey PDF](#).

To access the survey, we require your email, name, and company name. This information is also used to deliver your copy of the A&E Clarity scorecard. Deltek does not publish or sell this information. After you provide this information, you will be taken to a brief overview of the survey:

**Please enter your company email:**

**Please provide the following information before entering the survey.**

**Row:**

[r1] First Name:

[r2] Last Name:

[r3] Company Name:

*Deltek does not publish or sell this information.*

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## **42nd Annual Deltek Clarity Architecture & Engineering (A&E) Industry Survey**

### Introduction

Welcome and thank you again for your participation in the 42<sup>nd</sup> Annual Deltek Clarity Architecture & Engineering Survey.

Before you begin, please note: The survey will be based on your fiscal year that ended in 2020. Please report answers in U.S. or Canadian dollars. The survey is comprised of sections dedicated to different functional areas (e.g. business development, project management, etc.). If a section is best answered by another colleague in your company, you will be prompted to provide their email address for further outreach. Each section will take about 15 minutes to complete. To ensure that you are able to pause taking the survey, save your progress, and resume where you left off, please plan to complete the survey on the same browser and device that you used to begin, and refrain from clearing your browser cookies until you have completed the survey. We recommend reviewing these [frequently asked questions](#) before beginning the survey.

If you would like to review the questions in advance of starting the survey, please click to download a PDF of the survey: [Deltek Clarity A&E Survey PDF](#).

If you have questions about the survey or technical issues, please email our independent research provider, CMG, at [research@cmgconsulting.com](mailto:research@cmgconsulting.com).

Thank you in advance for your participation.

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### **AE – Firm Profile**

**In this section, please provide basic company information so we can better understand more about the type of firm you represent.**

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**[FP1] Which best describes your type of firm?**

**Row:**

- [r1] Architecture or A/E
- [r2] Engineering or E/A
- [r3] Other (please specify)

**[FP2] How many employees are in your firm?**

**Row:**

- [r1] 0–50 employees
- [r2] 51–250 employees
- [r3] 251-750+ employees
- [r4] 751+

**[FP3] In what state or province is your firm's headquarters located?**

**Choice:**

- [ch1] Alabama
- [ch2] Alaska
- [ch3] Arizona
- [ch4] Arkansas
- [ch5] California
- [ch6] Colorado
- [ch7] Connecticut
- [ch8] Delaware
- [ch9] Florida
- [ch10] Georgia
- [ch11] Hawaii
- [ch12] Idaho
- [ch13] Illinois
- [ch14] Indiana

[ch15] Iowa  
[ch16] Kansas  
[ch17] Kentucky  
[ch18] Louisiana  
[ch19] Maine  
[ch20] Maryland  
[ch21] Massachusetts  
[ch22] Michigan  
[ch23] Minnesota  
[ch24] Mississippi  
[ch25] Missouri  
[ch26] Montana  
[ch27] Nebraska  
[ch28] Nevada  
[ch29] New Hampshire  
[ch30] New Jersey  
[ch31] New Mexico  
[ch32] New York  
[ch33] North Carolina  
[ch34] North Dakota  
[ch35] Ohio  
[ch36] Oklahoma  
[ch37] Oregon  
[ch38] Pennsylvania  
[ch39] Rhode Island  
[ch40] South Carolina  
[ch41] South Dakota  
[ch42] Tennessee  
[ch43] Texas  
[ch44] Utah  
[ch45] Vermont

- [ch46] Virginia
  - [ch47] Washington
  - [ch48] West Virginia
  - [ch49] Wisconsin
  - [ch50] Wyoming
  - [ch51] District of Columbia
  - [ch52] Puerto Rico
  - [ch53] Alberta
  - [ch54] British Columbia
  - [ch55] Newfoundland and Labrador
  - [ch56] Manitoba
  - [ch57] New Brunswick
  - [ch58] Nova Scotia
  - [ch59] Ontario
  - [ch60] Prince Edward Island
  - [ch61] Quebec
  - [ch62] Saskatchewan
  - [ch0] My firm's headquarters is not in the United States or Canada
  - [ch99] Refusal
- 

**[FP4a] What is the legal structure of your firm?**

**Row:**

- [r1] Sole proprietorship
- [r2] PA, PC, LLC, LLP, Other Pass-Through
- [r3] Private—C-Corp (U.S.)
- [r4] Private—S-Corp (U.S.)
- [r5] Public company
- [r6] ESOP
- [r7] Other (please specify)

**[FP4b] What is the legal structure of your firm?**

**Row:**

- [r1] Sole proprietorship
  - [r2] Canadian Federal Incorporated
  - [r3] Canadian Provincial Incorporated
  - [r4] PA, PC, LLC, LLP, Other Pass-Through
  - [r5] Public company
  - [r6] ESOP
  - [r7] Other (please specify)
- 

**[FP5] Please check the services below that your firm provides:**

**Row:**

- [r1] Architecture
- [r2] Civil Engineering
- [r3] Construction/Construction Management
- [r4] Electrical Engineering
- [r5] Environmental Services
- [r6] Geotechnical
- [r7] GIS
- [r8] Hydrology
- [r9] Interior Design
- [r10] Landscape Architecture
- [r11] Mechanical Engineering
- [r12] Planning
- [r13] Structural Engineering
- [r14] Surveying

[r15] Other (please specify)

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**[FP6] In 2020, in which markets did your firm work?**

*For each item, select yes or no.*

**Column:**

[c1] Yes

[c0] No

**Row:**

[r1] Commercial

[r2] Education

[r3] Energy/Power

[r4] Federal

[r5] Healthcare

[r6] Hospitality

[r7] Industrial

[r8] Public Facilities

[r9] Residential

[r10] Transportation

[r11] Surveying/GIS/Mapping

[r12] Water/Wastewater/Stormwater

[r13] Other (please specify)

**[FP7] Please indicate which associations your firm or employees are members of.**

*These are not requirements for participation in this survey.*

**Column:**

[c1] Yes

[c0] No

**Row:**

[r1] ACEC (the firm)

[r2] ACEC Canada (the firm)

[r3] Society for Marketing Professional Services (any employee)

[r4] AIA (any employee)

**[FP9] Is this the first time you have taken the Clarity survey?**

**Row:**

[r1] Yes

[r0] No

---

**[COV1] Business Impact of Global Pandemic In 2020, what percentage of your company's projects experienced the following because of the pandemic?**

(Must add up to 100%)

**Row:**

[r1] Delay

[r2] Cancellation

[r3] Reduction in scope

[r4] Increase in scope

[r5] Accelerations

[r6] No change

---

**[COV3] In 2020, in which markets did your company experience an impact to your pipeline? For each market, indicate delay, acceleration, no change.**

**Column:**

[c1] Delay

[c3] No change

[c2] Acceleration

[c4] Did not work in this market

**Row:**

[r1] Commercial

- [r2] Education
  - [r3] Energy/Power
  - [r4] Federal
  - [r5] Healthcare
  - [r6] Hospitality
  - [r7] Industrial
  - [r8] Public Facilities
  - [r9] Residential
  - [r10] Transportation
  - [r11] Waste/Wastewater/Stormwater
- 

**[COV4] Which of the following technologies did your company have in place before the pandemic?**

Select all that apply

**Row:**

- [r1] Electronic Invoicing (E-Invoicing)
  - [r2] Collaboration Tools (Microsoft Teams, SharePoint, Slack, etc.)
  - [r3] Online Meeting Platforms (Zoom, Skype, Microsoft Teams, Webex, etc.)
  - [r4] Cybersecurity (firewalls, email security, malware, antivirus, etc.)
  - [r5] Market Intelligence, Research (includes research and analytics to support or inform GTM strategy)
  - [r6] Project or Resource Management Tools
  - [r7] Moving Solutions to the Cloud
  - [r8] Talent Acquisition and Onboarding
  - [r9] Performance Management
  - [r10] Business Automation (business process automation, elimination of manual processes, and AI)
-

**[COV5] In 2020, which of these technologies or new tools did your company increase investment in as a result of the pandemic?**

Select all that apply

**Row:**

[r1] Electronic Invoicing (E-Invoicing)

[r2] Collaboration Tools (Microsoft Teams, SharePoint, Slack, etc.)

[r3] Online Meeting Platforms (Zoom, Skype, Microsoft Teams, Webex, etc.)

[r4] Cybersecurity (firewalls, email security, malware, antivirus, etc.)

[r5] Market Intelligence, Research (includes research and analytics to support or inform GTM strategy)

[r6] Project or Resource Management Tools

[r7] Moving Solutions to the Cloud

[r8] Talent Acquisition and Onboarding

[r9] Performance Management

[r10] Business Automation (business process automation, elimination of manual processes, and AI)

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**[COV6] Looking forward 1 year, what technologies does your company plan to prioritize for investment?**

Select all that apply

**Row:**

[r1] Electronic Invoicing (E-Invoicing)

[r2] Collaboration Tools (Microsoft Teams, SharePoint, Slack, etc.)

[r3] Online Meeting Platforms (Zoom, Skype, Microsoft Teams, Webex, etc.)

[r4] Cybersecurity (firewalls, email security, malware, antivirus, etc.)

[r5] Market Intelligence, Research (includes research and analytics to support or inform GTM strategy)

[r6] Project or Resource Management Tools

[r7] Moving Solutions to the Cloud

[r8] Talent Acquisition and Onboarding

[r9] Performance Management

[r10] Business Automation (business process automation, elimination of manual processes, and AI)

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**[COV7] In 2020, what were the top three challenges your company faced with project delivery during the pandemic?**

*Rank your top three choices with #1 being the most important.*

**Row:**

[r1] Delivering projects remotely

[r2] Coordination with clients

[r3] Adjusting processes to accommodate new client project or business demands

[r4] Streamlining business processes to eliminate inefficiencies

[r5] Tracking time spent on project tasks/milestones

[r6] Managing dispersed resources

[r7] Managing project information

[r8] Invoicing clients electronically

[r9] Other

**Choice:**

[ch1] 1st

[ch2] 2nd

[ch3] 3rd

**[COV7a] Please specify for other option:**

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**[COV8] In 2020, how did the frequency of monitoring your company's KPIs change from 2019?**

Select one

**Row:**

[r1] Increased significantly

- [r2] Increased slightly
  - [r3] Stayed the same
  - [r4] Decreased slightly
  - [r5] Decreased significantly
  - [r6] Not sure
- 

**[COV9] In 2020, how did the number of KPIs monitored change for your business?**

Select one

**Row:**

- [r1] Increased significantly
  - [r2] Increased slightly
  - [r3] Stayed the same
  - [r4] Decreased slightly
  - [r5] Decreased significantly
  - [r6] Not sure
- 

**[COV10] How did your company adjust their workforce during the pandemic?**

Select all that apply

**Row:**

- [r1] Furlough
- [r2] Layoff
- [r3] Salary freeze or reduction
- [r4] No year-end bonuses
- [r5] Hold off on promotions
- [r6] Hire temps
- [r7] Hire full-time staff
- [r8] None of the above – Business as usual

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**[COV11] How has the pandemic changed your employee benefits moving forward?**

Select all that apply

**Row:**

[r1] More flexible work options (work from home)

[r2] More benefits for mental health, etc. to support employees

[r3] Flexible PTO or vacation offering

[r4] New remote working policy

[r5] Other, please specify:

[r6] None of the above

**This is the last question for the Firm Profile and Business Impact of Pandemic sections.**

If you wish to review and modify your answers please use the “Back” button.

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**Choose Sections to Complete**

You will now be asked to make an important determination about which survey sections to complete on behalf of your firm.

While you are encouraged to complete as many sections as possible, if another contact at your firm is better positioned to address questions in an upcoming section, you will be given the opportunity on the next page to provide that person’s contact information. That person will then receive an invitation to participate in that section of the survey.

Your scorecard will only contain benchmarks for the information provided by your company.

To review the questions for each section and the recommended reports to help you complete the survey, please click [here](#).

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**[FP8] Please select the survey sections to which you are prepared to respond.**

*For each item, select yes or no.*

**Column:**

[c1] Yes

[c0] No

**Row:**

[r5] Section 1: Technology Trends

[r1] Section 2: Financial Statements

[r2] Section 3: Business Development

[r3] Section 4: Project Management

[r4] Section 5: Human Capital Management

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[FP8\_5a] Technology Trends Referral Please identify the email address of the best contact at your firm for completing the Technology Trends section.

[FP8\_1a] Financial Statements Referral Please identify the email address of the best contact at your firm for completing the Financial Statements section.

[FP8\_2a] Business Development Referral Please identify the email address of the best contact at your firm for completing the Business Development section.

[FP8\_3a] Project Management Referral Please identify the email address of the best contact at your firm for completing the Project Management section.

[FP8\_4a] Human Capital Management Referral Please identify the email address of the best contact at your firm for completing the Human Capital Management section.

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**[TT1] AE – Technology Trends How important are the following emerging technology trends to your business?**

*Rank each item from not important to very important.*

**Column:**

- [c1] Not at all important
- [c2] Somewhat unimportant
- [c3] Neither important nor unimportant
- [c4] Somewhat important
- [c5] Very important

**Row:**

- [r1] Big Data
- [r2] Data Science
- [r3] Artificial Intelligence
- [r4] Machine Learning
- [r5] The Internet of Things
- [r6] Natural Language Processing
- [r7] Geo Location
- [r8] Wearable Technology
- [r9] Blockchain
- [r10] Augmented/Virtual Reality
- [r11] Robotic Process Automation (RPA)
- [r12] Digital Twins

**[TT2] In what areas of your business are you applying these emerging technology trends?**

*Select all that apply.*

**Row:**

- [r1] Project Information Management
- [r2] Project Management
- [r3] Project Execution
- [r4] Building Information Management
- [r5] Resource Management
- [r6] Business Development and Marketing
- [r7] Human Capital Management
- [r8] Business Administration

[r9] Financial Management

[r10] None of the Above

**[TT2a] How are you applying your top 3 most important technology trends for your business?**

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**[TT3] When considering the technology trends facing your firm in the next 3 years, what would you consider the top 3 challenges?**

*Rank your top three choices with #1 being the biggest challenge.*

**Row:**

[r1] Educating Clients about Technology Trends and their Application to Projects

[r2] Educating Employees about Trends and their Application to A/E/C

[r3] Lack of Champion to Lead Initiative

[r4] Cost of Technology (e.g. Equipment, Education)

[r5] Buy-In From Firm Leadership

[r6] Prioritizing Which Trends are Most Applicable to Your Business

[r7] Lack of Time to Invest in Learning about Technology Trends

[r8] Lack of Internal Expertise

[r9] Corporate Culture/Openness to Emerging Technologies

**Choice:**

[ch1] 1st

[ch2] 2nd

[ch3] 3rd

**[TT3a] What additional technology-related challenges is your firm facing?**

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**[TT4] When thinking about the next 3 years, what are the top 3 initiatives your firm is using to address its technology trend challenges?**

*Rank your top three choices with #1 being the top initiative.*

**Row:**

[r1] Create Strategic Plan for Implementing Technology Trends

- [r2] Identify Champion to Lead Initiative
- [r3] Hire Staff or Acquire Company with Necessary Expertise
- [r4] Develop Budget for Strategic Investment
- [r5] Identify and Develop Technology Subject Matter Experts
- [r6] Educate Staff on Technology Trends
- [r7] Identify Technology Partners

**Choice:**

- [ch1] 1st
- [ch2] 2nd
- [ch3] 3rd

**[TT4a] What additional initiatives is your firm implementing to address emerging technology challenges in the next 3 years?**

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**[TT5] What are the top three challenges your company's IT operations face in the next 12 months?**

*Rank your top three choices with #1 being the most important.*

**Row:**

- [r1] Migrating to cloud
- [r2] Managing legacy systems
- [r3] Data and cybersecurity
- [r4] Finding top IT talent
- [r5] Operating with a smaller IT budget
- [r6] Maintaining physical infrastructure
- [r7] Implementing new software systems
- [r8] Implementing a merger or acquisition
- [r9] Setting up new facilities
- [r10] Lack of integration for systems

**Choice:**

- [ch1] 1st

[ch2] 2nd

[ch3] 3rd

**[TT5a] If there are other challenges not listed above, please specify here:**

---

**[TT6] What is your company doing to address your IT operation challenges in the next 12 months?**

*Select all that apply.*

**Row:**

[r1] Hire more IT staff

[r2] Build out new IT infrastructure

[r3] Reengineer business processes

[r4] Outsource IT administration and infrastructure

[r5] Consolidate the number of vendors or systems used

[r6] Offshore IT staff

[r7] Create new security policies and procedures

[r8] Other

---

**[TT7] In the next 12 months, which business application systems does your company plan to invest in?**

*Select all that apply.*

**Row:**

[r1] Accounting and Finance

[r2] Human Capital Management

[r3] Customer Relationship Management

[r4] Project Management

[r6] Business Intelligence

- [r7] Procurement
- [r8] Security and Authentication
- [r9] Collaboration
- [r10] Emerging Technology Trends
- [r11] Cloud Technology/Infrastructure
- [r12] Other

---

**[TT8] Where does your function sit on the following digital transformation maturity spectrum, now and in five years?**

*Choose one for 'Today' and 'In 5 years'*

**Column:**

- [c4] Today
- [c5] In 5 Years

**Row:**

- [r3] **Nascent** There's a disconnect between business and digital IT initiatives and a misalignment with company strategy
  - [r4] **Exploratory** There's a recognition of the need for digital transformation strategy but execution is at the lighthouse stage, on an ad-hoc project, which is neither predictable or scalable
  - [r5] **Applied** There's alignment between business and IT goals and momentum to adapt, but not dedicated focus on the full disruptive potential of digital initiatives
  - [r6] **Mature** Business and IT management are integrated and delivering digitally enabled product / service experiences on a continuous basis
  - [r7] **Advanced** Digital transformation is a primary strategic focus at the executive level and a culture of innovation is prevalent along with, increasing revenue, improving customer experience and growing operating margins
-

**[TT9] Considering the use of spreadsheets or manual data entries in the following areas of your business, please fill out the following table, indicating your level of reliance on a scale from 1 to 5 where '1'= Completely reliant, '3'= Moderately reliant and '5'= Not at all reliant.**

**Column:**

[c1] 1 - Completely reliant

[c2] 2

[c3] 3 - Moderately reliant

[c4] 4

[c5] 5 - Not at all reliant

**Row:**

[r1] Human Resource

[r2] Marketing

[r3] Client/Customer Experience

[r4] Sales

[r5] Accounting & Finance

[r6] Research & Development

[r7] Administrative/management

[r8] Operations/Resource Management

[r9] IT support

[r10] Procurement

[r11] Legal

**[TT9a] How did your reliance on spreadsheets or manual data entries change from 2019 in the following areas of your business?**

**Column:**

[c1] Increased

[c2] Stayed the Same

[c3] Decreased

**Row:**

[r1] Human Resource

[r2] Marketing

[r3] Client/Customer Experience

[r4] Sales

[r5] Accounting & Finance

[r6] Research & Development

[r7] Administrative/management

[r8] Operations/Resource Management

[r9] IT support

[r10] Procurement

[r11] Legal

**This is the last question for the Technology Trends sections.** If you wish to review and modify your answers please use the “Back” button.

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### **AE – Financial Statements**

This section is designed to collect financial metrics from your firm’s balance sheet and income statement, including other key inputs such as total revenue, net revenue, backlog, and more. In this section, you will also be asked to address questions regarding your firm’s financial challenges and initiatives.

For this section, it may be helpful to have the following 2020 reports ready to assist you in answering the questions:

Balance Sheet

Income Statement

Employee Labor Summary

Office Earnings Report

CRM Pipeline Report

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<b>Income Statement</b> Keep in mind that the accounts we ask for may not match your own
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chart of accounts, so you may need to recast some numbers. In your responses, please use the FULL NUMBERS and DO NOT USE COMMAS (e.g. for \$1 million, write "1000000", not "1", "1000k", "1,000,000", etc.).

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**[FS1] Which currency will you use to complete this section of the survey?**

**Row:**

[r1] USD (United States Dollar)

[r2] CAD (Canadian Dollar)

**[FS2] How many full-time equivalents (FTE) did your firm have at year-end 2020?**

[FS3] In 2020, what was your firm's: Total Annual Revenue (\$)?

Total Annual Revenue = Earned revenues whether billed or unbilled. The amount recorded should include fees, consultants, reimbursables and all markups on reimbursables. Exclude revenues not closely related to consulting services. This does include income and revenue from real estate, construction subsidiaries, outside business interests, etc.

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**Row:**

[r1] Total Annual Revenue:

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**[FS4] In 2020, what were your firm's: Project-Related Expenses (\$)?**

*Enter a value for each item below.*

**Row:**

[r1] Reimbursable Consultants

[r2] Reimbursable Expenses

[r3] Direct Consultants

[r4] Direct Expenses

[r5] Bad Debt

[r6] All Other Project-Related Expenses

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[FS5] In 2020, what was your firm's: Net Revenue (\$)?

Net Revenue = Total Revenue minus Total Direct Expenses

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**Row:**

[r1] 2020 Net Revenue:

[FS5a] In 2019, what was your firm's: Net Revenue (\$)?

Net Revenue = Total Revenue minus Total Direct Expenses

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**Row:**

[r1] 2019 Net Revenue:

[FS6] In 2020, what were your firm's: Direct Labor Expenses (\$)?

Direct Labor Expenses: All job chargeable labor, whether billed or not, at raw labor rates, for employees receiving W-2s, T-4s, or equivalent. Does not include bonuses.

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**Row:**

[r1] Direct Labor:

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Your firm's calculated Gross Profit from these questions is:

Gross Profit:  $\$\{FS5.ival - FS6.ival\}$

Gross Profit = Net Revenue minus Direct Labor Expenses. If the calculated Gross Profit does not match your firm's records, use the "Back" button below to go back and modify your answers.

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[FS7] In 2020, what was your firm's: Overhead/Indirect Labor (\$)?

Overhead/Indirect Labor: Non-job-chargeable labor at raw labor rates for employees receiving W-2, T-4, or equivalent. Does not include bonuses. All paid leave at raw labor

rates.

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*Enter a value for each item below.*

**Row:**

[r1] Vacation, Holiday, Sick, and Personal

[r2] Marketing and Business Development Labor

[r3] All Other Overhead/Indirect Labor (including job cost variance)

[FS8] In 2020, what were your firm's: Other Labor-Related Expenses (\$)?

Group Insurance: Group health, life, dental, disability, and other insurance premiums, excluding workers' compensation. Retirement Funds: Mandatory and discretionary contributions to 401k, pensions, or equivalent. Other Labor-Related Expenses: Payroll taxes, workers' compensation, group health/life, 401k, and pensions.

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*Enter a value for each item below.*

**Row:**

[r1] Statutory Taxes

[r2] Workers' Compensation Insurance

[r3] Group Insurance

[r4] Retirement Funds

[r5] All Other Labor-Related Expenses

[FS9] In 2020, what were your firm's: Professional Development Expenses (\$)?

Professional Development Expenses: Professional licenses, registrations and organization dues, educational conferences, and continuing education registration and fees.

**Row:**

[r1] Professional Development Expenses:

[FS10] In 2020, what were your firm's: Marketing Expenses (\$)?

Marketing Expenses: Professional marketing membership, marketing materials, conference expenses, and travel.

*Exclude marketing and business development labor.*

**Row:**

[r1] Marketing Expenses:

[FS11] In 2020, what were your firm's: Corporate Expenses (\$)?

Corporate Expenses: Liability insurance, accounting, legal, professional services, business taxes.
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*Enter a value for each item below.*

**Row:**

[r1] Liability Insurance

[r2] Other Business Taxes

[r3] All Other Corporate Expenses

[FS12] In 2020, what were your firm's: All Other Overhead Expenses (\$)?

All Other Overhead Expenses: Expenses beyond A) Indirect Labor, B) Other Labor-Related Expenses, C) Professional Development Expenses, D) Marketing and Business Development Expenses, and E) Corporate Expenses.
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**Row:**

[r1] All Other Overhead Expenses:

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Your firm's calculated Total Overhead Expenses and Operating Profit from the information you provided is:

Total Overhead Expenses:  $\$ \{ ( (FS7.r1.ival + FS7.r2.ival + FS7.r3.ival) + (FS8.r1.ival + FS8.r2.ival + FS8.r3.ival + FS8.r4.ival + FS8.r5.ival) + (FS9.r1.ival) + (FS10.r1.ival) + (FS11.r1.ival + FS11.r2.ival + FS11.r3.ival) + (FS12.r1.ival) ) \}$

Operating Profit:  $\$ \{ ( (FS5.ival - FS6.ival) - ( (FS7.r1.ival + FS7.r2.ival + FS7.r3.ival) + (FS8.r1.ival + FS8.r2.ival + FS8.r3.ival + FS8.r4.ival + FS8.r5.ival) + (FS9.r1.ival) + (FS10.r1.ival) + (FS11.r1.ival + FS11.r2.ival + FS11.r3.ival) + (FS12.r1.ival) ) ) \}$

Operating Profit = Gross Profit minus Total Overhead Expenses. If these values do not match your firm's records, use the "Back" button below to go back and modify your answers.

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[FS13] In 2020, what were the totals for your firm's: Interest, Bonus, and Other Income/Expenses (\$)?

Interest – Net: Net interest earned and paid Bonuses: Does not include distributions, or bonuses in lieu of distributions, to shareholders. Includes accrued bonuses. Other Income/Expenses: Net of non-primary business-related incomes and expenses

---

*Enter a value for each item below.*

**Row:**

[r1] Interest—Net

[r2] Bonuses

[r3] Depreciation & Amortization

[r4] Other Income/Expense

[FS14] In 2020, what were your firm's: Income Taxes (\$)?

Income Taxes: Includes federal, state, or provincial income tax paid only at the corporate level; otherwise, enter \$0.

---

**Row:**

[r1] Income Taxes:

---

The calculated total Interest, Bonus, and Other Income/Expense from the information you provided is:

Total Interest, Bonus, and Other Income/Expense:  $\$ \{ ( \text{FS13.r1.ival} + \text{FS13.r2.ival} + \text{FS13.r3.ival} + \text{FS13.r4.ival} ) \}$

---

The calculated Net Profit/Loss from the information you provided is:

Net Profit/Loss:  $\$ \{ ( ( (FS5.ival - FS6.ival) - ((FS7.r1.ival + FS7.r2.ival + FS7.r3.ival) + (FS8.r1.ival + FS8.r2.ival + FS8.r3.ival + FS8.r4.ival + FS8.r5.ival) + (FS9.r1.ival) + (FS10.r1.ival) + (FS11.r1.ival + FS11.r2.ival + FS11.r3.ival) + (FS12.r1.ival))) - (FS13.r1.ival + FS13.r2.ival + FS13.r3.ival + FS13.r4.ival) - (FS14.r1.ival) ) \}$

Net Profit/Loss = Pre-tax Income (operating profit and interest, bonus, and other income/expenses) minus Income Taxes. If the calculated Net Profit/Loss does not match your records, use the "Back" button below to go back and modify your answers.

---

[FS15] At the end of 2020, what was your firm's: Total Revenue Backlog (\$)?

Total Revenue Backlog: Dollar value of work under contract minus amount already recognized as revenue
---

---

**Row:**

[r1] Total Revenue Backlog:

---

[FS16] At the end of 2020, what was the value for your firm's: Current Assets (\$)?

Cash: Cash and cash equivalents Accounts Receivable: Amount invoiced, but not yet paid, less allowance for bad debt. Work-in-Process: Revenue recognized on project, but not yet billed to clients. Pre-paid Expenses: Expenses paid in advance, but not yet recorded on the Income Statement, e.g., professional liability insurance, rent, and other deposits. Other Short-Term Assets: Any other assets not itemized elsewhere.
--

---

*Enter a value for each item below.*

**Row:**

[r1] Cash

[r2] Accounts Receivable

[r3] Work-in-Process

[r4] Pre-Paid Expenses

[r5] Other Short-Term Assets

[FS17] In 2020, what was the value of your firm's: Fixed Assets (\$)?

Fixed Assets (except Goodwill): Furniture, fixtures, equipment, computers, vehicles, real estate. Depreciation: Accumulated depreciation for fixed assets. Goodwill—Net of Amortization: Intangible assets less amortization, e.g., acquisition price in excess of book value.

---

*Enter a value for each item below.*

**Row:**

[r1] Fixed Assets (except goodwill)

[r2] Depreciation

[r3] Goodwill—Net of Amortization

[FS18] In 2020, what were your firm's: Other Long-Term Assets (\$)?

Long-term Notes: Notes/Loans with maturity greater than one year. Excludes loans to stockholders counted under stockholders' equity. Other Long-term Assets: Any Other Long-Term Assets not itemized elsewhere.

---

*Enter a value for each item below.*

**Row:**

[r1] Long-Term Notes/Loans Receivable

[r2] Other Long-Term Assets

[FS19] In 2020, what were your firm's: Other Assets (\$)?

Other Assets: Any assets not included in Current Assets, Fixed Assets, or Other Long-Term Assets.

---

*Enter \$0 if N/A.*

**Row:**

[r1] Other Assets:

---

Your firm's calculated Total Assets from the information you provided is:

Total Assets:  $\$ \{ ( \text{FS16.r1.ival} + \text{FS16.r2.ival} + \text{FS16.r3.ival} + \text{FS16.r4.ival} + \text{FS16.r5.ival} ) + ( \text{FS17.r1.ival} + \text{FS17.r2.ival} + \text{FS17.r3.ival} ) + ( \text{FS18.r1.ival} + \text{FS18.r2.ival} ) + ( \text{FS19.r1.ival} ) \}$

Total Assets = Current Assets + Fixed Assets + Other Long-Term Assets + Other Assets. If the calculated Total Assets value does not match your records, use the "Back" button below to go back and modify your answers.

---

**[FS20] In 2020, for consultants, vendors, and employees, what was the value of your firm's: Accounts Payable (\$).**

*Enter a value for each item below.*

**Row:**

[r1] Accounts Payable—Consultants

[r2] Accounts Payable—Vendors

[r3] Accounts Payable—Employees

**[FS21] In 2020, what were your firm's: Accrued Employee Expenses (\$)?**

Accrued Employee Expense: Accrued wages, salaries, paid leave, and payroll-related expense.
---

---

*Enter a value for each item below.*

**Row:**

[r1] Accrued Employee Salaries

[r2] Accrued Employee Vacation, Sick, etc.

[r3] Accrued Employee Other

**[FS22] In 2020, what was the value of your firm's: Other Liabilities (\$)?**

Line of Credit and Short-Term Notes Outstanding: Amount owed under short-term loans, revolving loans, lines of credit, and current portion of long-term debt. Current Taxes: Income taxes due for this year but not yet paid. Only if taxes paid at the corporate level; otherwise, enter \$0. Other Current Liabilities: Any Other Current Liabilities not itemized elsewhere.
---

---

**Row:**

[r1] Line-of-Credit and Short-Term Notes Outstanding

[r2] Current Taxes

[r3] Other Current Liabilities

[FS23] In 2020, what was the value of your firm's: Long-Term Liabilities (\$)?

Long-Term Debt: Amount due under loans greater than one year, excluding current portion. Deferred Taxes: Allowance for deferred income tax liability for cash-basis taxpayers. Only if taxes paid at the corporate level; otherwise, enter \$0. Other Long-Term Liabilities: Any Other Long-Term Liabilities not itemized elsewhere.

---

**Row:**

[r1] Long-Term Debt

[r2] Deferred Taxes

[r3] Other Long-Term Liabilities

---

Your firm's calculated Total Liabilities from the information you provided is:

Total Liabilities:  $\$ \{ (FS20.r1.ival + FS20.r2.ival + FS20.r3.ival) + (FS21.r1.ival + FS21.r2.ival + FS21.r3.ival) + (FS22.r1.ival + FS22.r2.ival + FS22.r3.ival) + (FS23.r1.ival + FS23.r2.ival + FS23.r3.ival) \}$

Total Liabilities = Accounts Payable + Accrued Employee Expenses + Other Current Liabilities + Long Term Liabilities. If the calculated Total Liabilities value does not match your records, use the "Back" button below to go back and modify your answers.

---

[FS24] In 2020, what was the value of your firm's: Stockholders' Equity (\$)?

Stock and Additional Paid-In Capital: Contributed capital from stockholders. Distribution/Dividends—Current Year Only: Distributions to stockholders or partners in current year. Principals' Equity—Long-Term Notes/Loans Receivable: A contra-account. Includes loans to stockholders. This value should be less than or equal to zero. Previous Years Retained Earnings: Accumulated net profits from prior years not paid to stockholders. Current Net Profit/Loss: From Income Statement.

**Row:**

[r1] Stock and Additional Paid-In Capital

[r2] Distribution/Dividends—Current Year Only

[r3] Principals' Equity—Long-Term Notes/Loans Receivable

[r4] Previous Years Retained Earnings

[r5] Current Net Profit (Loss)

[r6] Other Stockholders' Equity

---

Your firm's calculated Total Liabilities & Stockholders' Equity from the information you provided is:

Total Liabilities & Stockholders' Equity:  $\$ \{ ( \text{hidFS23\_Calc.ival} ) + ( \text{FS24.r1.ival} + \text{FS24.r2.ival} + \text{FS24.r3.ival} + \text{FS24.r4.ival} + \text{FS24.r5.ival} + \text{FS24.r6.ival} ) \}$

Total Liabilities & Stockholders' Equity = (Total Liabilities) + (Stock & Additional Paid-In Capital) + (Distribution/Dividends) + (Principals' Equity – Long-Term Notes/Loans Receivable) + (Previous Year's Retained Earnings) + (Current Net Profit (Loss)) + (Other Stockholders' Equity). If the calculated Total Liabilities & Stockholders' Equity value does not match your records, use the "Back" button below to go back and modify your answers.

---

**[FS25] Estimate the percentage of total annual revenue earned for each of the following categories of clients. (Sum should equal 100%)**

**Row:**

[r1] Private—Domestic

[r2] Private—Foreign

[r3] Government—Federal

[r4] Government—State or Provincial

[r5] Government—Municipal, Local

[r6] Government—Foreign

[r7] Public–Private Partnership

[r8] Quasi-Government

[r9] Other (please specify)

---

**[FS26] Estimate the percentage of net revenues earned in-house for each of the following categories. (Sum should equal 100%)**

**Row:**

[r1] Architecture

[r2] Civil Engineering

[r3] Construction/Construction Management

[r4] Electrical Engineering

[r5] Environmental Services

[r6] Geotechnical

[r7] GIS

[r8] Hydrology

[r9] Interior Design

[r10] Landscape Architecture

[r11] Mechanical Engineering

[r12] Planning

[r13] Structural Engineering

[r14] Surveying

[r15] Other (please specify)

---

**[FS27] Estimate the percentage of net revenue for each of the following project types.**

**Row:**

[r1] Commercial

[r2] Education

[r3] Energy/Power

[r4] Federal

[r5] Industrial

[r6] Health Care

- [r7] Hospitality
  - [r8] Public Facilities
  - [r9] Residential
  - [r10] Surveying/GIS/Mapping
  - [r11] Transportation
  - [r12] Water/Wastewater/Stormwater
  - [r13] Other (please specify)
- 

**[FS28] What percentage of your firm's Net Revenue does each of the following contract types account for?**

**Row:**

- [r1] Unit Price (time and materials, hourly rates, per diem, salary times multiplier)
- [r2] Fixed Price
- [r3] Cost Plus
- [r4] Design-Build
- [r5] Integrated Project Delivery
- [r6] Other

**[FS29] What percentage of the following contract types is your firm the primary contract holder?**

**Row:**

- [r1] Unit Price (time and materials, hourly rates, per diem, salary times multiplier)
  - [r2] Fixed Price
  - [r3] Cost Plus
  - [r4] Design-Build
  - [r5] Integrated Project Delivery
  - [r6] Other
- 

**[FS30] What is your firm's estimated net revenue for 2021?**

**Row:**

[r2] Net Revenue

---

**[FS31a] Have you done a firm valuation?**

**Row:**

[r1] Yes

[r0] No

**[FS31b] Do you plan to do a firm valuation in the next 12 months?**

**Row:**

[r1] Yes

[r0] No

---

**[FS32] When thinking about the next 3 years, what are the top 3 challenges facing your firm's financial leaders?**

*Rank your top three choices with #1 being the biggest challenge.*

**Row:**

[r1] Alignment with Executive Management

[r2] Cash Flow

[r3] Unpredictable Spending Environment

[r4] Increasing Profitability

[r5] Managing Growth

[r6] Managing Merger and Acquisition Activity

[r7] Organic Topline Growth

[r8] Succession Planning and Ownership Transition

[r9] Increasing Financial Knowledge/Savvy of Project Managers/Project Leaders

[r10] Finding and Retaining Qualified Staff

**Choice:**

[ch1] 1st

[ch2] 2nd

[ch3] 3rd

**[FS32a] Please describe any additional financial management challenges your firm faces.**

---

**[FS33] When thinking about the next 3 years, what are the top 3 initiatives your firm is using to address its financial challenges?**

*Rank your top three choices with #1 being the top initiative.*

**Row:**

[r1] Streamlining Billing Processes

[r2] Completing or Preparing a Merger/Acquisition

[r3] Organizational Changes/Realignments

[r4] Business Process Improvements

[r5] Better Forecasting

[r6] New Financial System Implementation

[r7] Better Managing Growth

[r8] Increasing Spending for Talent Acquisition and Retention

[r9] Training Project Managers on Financial Management

[r10] Improved Risk Management Plans/Systems

[r11] Other New System Implementation

**Choice:**

[ch1] 1st

[ch2] 2nd

[ch3] 3rd

**[FS33a] Please describe any additional initiatives your firm is implementing to address its financial management challenges.**

---

**[FS34] What software does your firm use for accounting and invoicing?**

*Select all that apply.*

**Row:**

- [r1] BST
- [r2] Unanet AE (Clearview)
- [r3] Deltek Ajera
- [r4] Deltek Maconomy
- [r5] Deltek Vision
- [r6] Microsoft Dynamics
- [r7] NetSuite
- [r8] Oracle
- [r9] Peachtree
- [r10] QuickBooks
- [r11] SAGE
- [r12] SAP
- [r13] Spreadsheets (e.g., Excel, Google Sheets, etc.)
- [r14] Deltek Vantagepoint
- [r15] BQE
- [r16] Other (please specify)

**This is the last question for the Financial Statements section.** If you wish to review and modify your answers please use the “Back” button.

---

**AE – Business Development**

The Business Development section identifies market trends, win rates, challenges, initiatives, and more to identify your position in the market today and where you want to be in the future.

**For this section, it will be helpful to have the following 2020 reports ready to assist you in answering the questions:** Annual Revenue by Client Win Rate/Hit Rate Report

---

**[BD1] What business development model does your firm use?**

**Row:**

[r1] Dedicated business development staff

[r2] Seller/Doer

[r3] Both

**[BD2] Does your firm utilize a formal sales/business development process?**

**Row:**

[r1] Yes

[r0] No

**[BD3] Responsibility In general, how often is each of the following groups responsible for business development in your firm?**

*Rank each item from never responsible to almost always responsible.*

**Column:**

[c1] Never responsible

[c2] Rarely responsible

[c3] Sometimes responsible

[c4] Often responsible

[c5] Almost always responsible

**Row:**

[r1] Dedicated business development staff

- [r2] Project managers
  - [r3] Executive team
  - [r4] Design team
  - [r5] Marketing staff
  - [r6] Other staff (please specify)
- 

**[BD4] When allocating their time, which of the following tasks are prioritized by staff members responsible for business development?**

*Rank your top three choices with #1 being most time spent.*

**Row:**

- [r1] Lead finding
- [r2] Networking
- [r3] Cold calling
- [r4] Pursuit strategy development
- [r5] Client relationship development
- [r6] Proposal development
- [r7] Client strategy planning or prospect planning
- [r8] Interview development and participation

**Choice:**

- [ch1] 1st
- [ch2] 2nd
- [ch3] 3rd

**[BD4a] Please describe any additional business development tasks prioritized by your firm's business developers.**

---

**[BD5] In 2020, how many competitive proposals did your firm submit and how many was your firm awarded?**

*Enter a value for each item below.*

**Row:**

[r1] Total number of proposals submitted:

[r2] Total number proposals awarded:

**[BD6] In 2020, based on your firm's competitive proposals submitted and awarded, what was the total dollar value for submitted and awarded proposals?**

*Enter a value for each item below.*

**Row:**

[r1] Total value of proposals submitted:

[r2] Total value of proposals awarded:

---

**[BD7] How has your firm's win rate changed since 2018?**

**Row:**

[r1] Increased significantly

[r2] Increased slightly

[r3] Stayed the same

[r4] Decreased slightly

[r5] Decreased significantly

[r6] We don't track win rate

**[BD8] In 2020, what percentage of your firm's net revenue was generated from your firm's top three clients?**

*List values from highest to lowest.*

**Row:**

[r1] Client 1

[r2] Client 2

[r3] Client 3

---

**[BD9] What are the top 3 sources for new opportunities for your pipeline?**

*Rank your top three choices with #1 being the most important.*

**Row:**

[r1] Dodge Data & Analytics

[r2] Active client relationships

[r3] Industry conferences and events

[r4] Website searches

[r5] GovWin IQ

[r6] Staff-identified leads

[r7] Public bid notices such as SAM.gov

[r8] Requests for Proposals/Requests for Qualifications

[r9] Teaming partners/Networking

[r10] Marketing-generated leads

[r11] Business Development staff

[r12] Integrated Marketing Systems (IMS)

[r13] Construction Market Data

[r14] Referrals/Word of mouth

**Choice:**

[ch1] 1st

[ch2] 2nd

[ch3] 3rd

**[BD9a] What additional sources does your firm use to identify new opportunities for your pipeline?**

---

**[BD10] What is the primary software your firm uses to manage business development activities and opportunities?**

Select one

**Row:**

[r1] Cosential

[r2] Deltek CRM (Vantagepoint, Vision, or Ajera)

[r3] HubSpot

[r4] Infusionsoft

[r5] Internally developed database

[r6] Microsoft CRM

[r7] Microsoft Excel

[r8] Microsoft Outlook

[r9] Salesforce

[r10] SharePoint

[r11] Smartsheet

[r12] Other (please specify)

[r13] None

---

**[BD11] Does your firm employ a formal go/no go process? This may be a meeting, conversation, checklist, or form that is completed to determine if the firm should pursue an opportunity.**

**Row:**

[r1] Yes

[r0] No

---

**[BD11a] In what situations does your firm employ a formal go/no go process?**

**Row:**

[r1] For all opportunities

[r2] For strategic opportunities

[r3] For new clients/prospects only

**[BD11b] For 2021, is your firm considering employing a formal go/no go process?**

**Row:**

[r1] Yes

[r0] No

---

**[BD12] Which 3 factors influence your firm the most when deciding whether or not to propose on a project?**

*Rank your top three choices with #1 being the most important.*

**Row:**

[r1] Do we have an existing relationship with the client?

[r2] Does the opportunity fit the brand or image we want to convey?

[r3] What is our probability of winning?

[r4] Do we have the time/resources to respond to the proposal?

[r5] Will it be profitable?

[r6] Do we have the right teaming partners or subconsultants?

[r7] Do we have the staff to deliver the project?

[r8] Is it a good fit for the type of work we do?

**Choice:**

[ch1] 1st

[ch2] 2nd

[ch3] 3rd

**[BD12a] What additional factors influence your firm when deciding whether or not to propose on a project?**

---

**[BD13] Top Business Development Challenges What are the top 3 business development challenges facing your firm in the next 3 years?**

*Rank your top three choices with #1 being the biggest challenge.*

**Row:**

[r1] Coordination between business development and operations

[r2] Finding the right teaming partners

[r3] Excessive administrative time maintaining reports and records

[r4] Finding time to nurture client relationships

[r5] Identifying new prospects

[r6] Increased competition

[r7] Increased cost of competing for projects

[r8] Lack of intel for opportunities to position for win

[r9] Limited business development resources

[r10] Not enough time to effectively respond to RFPs/RFQs

**Choice:**

[ch1] 1st

[ch2] 2nd

[ch3] 3rd

**[BD13a] What additional challenges does your firm have related to business development?**

---

**[BD14] What are your firm's top 3 initiatives to address business development challenges in the next 3 years?**

*Rank your top three choices with #1 being the most important.*

**Row:**

- [r1] Investing in market intel and CRM systems
- [r2] Strategic networking to expand teaming options
- [r3] Automating time-consuming tasks (proposal creation, reporting, etc.)
- [r4] Expanding geographically
- [r5] Improving analytics on business development
- [r6] Earlier identification of opportunities and requirements
- [r7] Cross-training staff to do business development
- [r8] Improving quality and availability of marketing data and materials
- [r9] Better opportunity identification
- [r10] Hiring additional staff
- [r11] Getting buy-in across firm for business development
- [r12] Improving follow-through process after identification

**Choice:**

- [ch1] 1st
- [ch2] 2nd
- [ch3] 3rd

**[BD14a] What additional initiatives is your firm implementing to address business development challenges?**

---

**[BD15] In the next 18 months, do you expect your firm's position in each of the following markets to grow, remain steady, or decline?**

*Provide a response for each item below.*

**Column:**

[c1] Grow

[c2] Remain steady

[c3] Decline

[c4] Do not focus on this market

**Row:**

[r1] Commercial

[r2] Education

[r3] Energy/Power

[r4] Federal

[r5] Health Care

[r6] Hospitality

[r7] Industrial

[r8] Public Facilities

[r9] Residential

[r10] Surveying/GIS/Mapping

[r11] Transportation

[r12] Water/Wastewater/Stormwater

[r13] Other (please specify)

---

**[BD16] Which marketing techniques does your firm currently use?**

*Select all that apply.*

**Row:**

[r1] Client-specific Marketing

[r2] Corporate Blog

[r3] Social Media Posts (LinkedIn, Facebook, etc.)

[r4] E-newsletters

[r5] Hard Copy Newsletters

- [r6] Content Marketing
  - [r7] Thought Leadership
  - [r8] Video Marketing
  - [r9] Direct Mail
  - [r10] Leads Generated from Website
  - [r11] Trade Shows/Exhibits
  - [r14] Virtual Trade Shows
  - [r12] Public Relations
  - [r13] Other (please specify)
- 

**[BD17] What marketing techniques do you think your firm uses most successfully?**

*Rank your top three choices with #1 being the most successful.*

**Row:**

- [r1] Client-specific Marketing
- [r2] Corporate Blog
- [r3] Social Media Posts (LinkedIn, Facebook, etc.)
- [r4] E-newsletters
- [r5] Hard Copy Newsletters
- [r6] Content Marketing
- [r7] Thought Leadership
- [r8] Video Marketing
- [r9] Direct Mail
- [r10] Leads Generated from Website
- [r11] Trade Shows/Exhibits
- [r14] Virtual Trade Shows
- [r12] Public Relations
- [r13] Other

**Choice:**

- [ch1] 1st

[ch2] 2nd

[ch3] 3rd

---

**[BD18] Which marketing techniques do you anticipate will be most important to your company's success in the next 5 years?**

*Select all that apply.*

**Row:**

[r1] Client-Specific Marketing

[r2] Corporate Blog

[r3] Social Media Posts (LinkedIn, Facebook, etc.)

[r4] E-newsletters

[r5] Hard Copy Newsletters

[r6] Content Marketing

[r7] Thought Leadership

[r8] Video Marketing

[r9] Direct Mail

[r10] Leads Generated from Website

[r11] Trade Shows/Exhibits

[r14] Virtual Trade Shows

[r12] Public Relations

[r13] Other (please specify)

**This is the last question for the Business Development section.** If you wish to review and modify your answers, please use the "Back" button.

---

## **AE – Project Management**

This section will ask you to identify your firm’s project key performance indicators, project manager resources, training opportunities, project execution successes, how your firm completes project and client satisfaction evaluations, as well as project management challenges and initiatives.

---

### **[PM1] Does your firm currently track the following key performance indicators (KPI)?**

*For each item, select yes or no.*

#### **Column:**

[c1] Yes

[c0] No

#### **Row:**

[r1] Average billing rate

[r2] Average collection period (days sales outstanding) for A/R Aged

[r3] Client satisfaction

[r4] Cost variance

[r5] Earned value management

[r6] Effective billing rate

[r7] Estimate at complete

[r8] Estimate to complete

[r9] Multipliers

[r10] Net revenue

[r11] On-time delivery

[r12] Profitability

[r13] Schedule variance

[r14] Other (please specify)

---

**[PM2] What percentage of your firm's current projects are being reported as on or under budget?**

**[PM3] What percentage of your firm's current projects are being reported as on or ahead of schedule?**

**[PM25] What percentage of your projects utilize Building Information Management as part of the design process?**

---

[PM4] Please rate the level of visibility – the ability to access and review individual or firm-wide metrics, as needed – project managers and principals have for each of the following project performance metrics.

Schedule variance: Schedule deliverable date compared to actual deliverable date Cost variance: Budgeted cost compared to actual cost, including ETC, EAC, hours, and values Project-specific KPIs: Profitability, net revenue, realization ratio, etc.
---

---

*Provide a response for each item below.*

**Column:**

[c1] Very low

[c2] Low

[c3] Moderate

[c4] High

[c5] Very High

**Row:**

[r1] Schedule variance

[r2] Cost variance

[r3] Project-specific KPIs

[r4] Client satisfaction

**[PM5] What is your level of confidence in your firm's ability to accurately report on the following project performance metrics?**

*Provide a response for each item below.*

**Column:**

- [c1] Very low
- [c2] Low
- [c3] Moderate
- [c4] High
- [c5] Very High

**Row:**

- [r1] Schedule
  - [r2] Budget
  - [r3] Actual cost
  - [r4] Overall project performance
- 

**[PM6] Approximately what percentage of your firm's projects use a clearly defined project management process?**

**Row:**

- [r1] 0%
- [r2] 1%–24%
- [r3] 25%–49%
- [r4] 50%–74%
- [r5] 75%–99%
- [r6] 100%

**[PM7] Does your firm have a Project Management Office (PMO) or a center of excellence for projects?**

**Row:**

- [r1] Yes
- [r0] No

**[PM8] Approximately what percentage of project leaders at your firm have formal project management training?**

**Row:**

[r1] 0%

[r2] 1%–24%

[r3] 25%–49%

[r4] 50%–74%

[r5] 75%–99%

[r6] 100%

---

**[PM9] Does your firm offer the following tools and resources to project managers?**

*For each item, select yes or no.*

**Column:**

[c1] Yes

[c0] No

**Row:**

[r1] Formal internal PM training

[r2] Formal external PM training

[r3] External PM certification

[r4] Informal internal PM meetings

[r5] PM mentor program

[r6] PM best practices

[r7] PM continuous improvement group

[r8] PM training resources for self-study

[r10] Business development training for PMs

[r11] Project Financial Management for PMs

[r9] Other (please specify)

---

**[PM10] Which of the following software does your firm use for project planning or resource scheduling?**

*Select all that apply.*

**Row:**

[r10] BQE

[r11] BST

[r9] Unanet AE (Clearview)

[r3] Deltek (Ajera, Vantagepoint or Vision)

[r7] Google Sheets

[r1] Microsoft Excel

[r2] Microsoft Project

[r4] Primavera

[r5] SharePoint

[r6] Smartsheet

[r8] Other (e.g., internal software) (please specify)

---

**[PM11] Which of the following software does your firm use for project or team collaboration?**

*Select all that apply.*

**Row:**

[r1] Basecamp

[r2] Bluebeam

[r3] Box

[r10] Deltek Collaboration

[r4] Deltek PIM

- [r5] DropBox
  - [r6] Email
  - [r7] File Share
  - [r8] HipChat
  - [r9] Homegrown applications
  - [r11] Microsoft OneNote
  - [r19] Microsoft Teams
  - [r12] Newforma
  - [r13] Procore
  - [r14] ProjectWise
  - [r15] SharePoint
  - [r16] Slack
  - [r18] TonicDM
  - [r17] Other (please specify)
- 

**[PM12] Does your firm use the following tools to share large files internally, externally, both, or not at all?**

*Provide a response for each item.*

**Column:**

- [c1] Internally
- [c2] Externally
- [c3] Both internally and externally
- [c4] Not at all

**Row:**

- [r1] Newforma
- [r2] Box
- [r3] CDs/portable storage device
- [r4] Deltek PIM

- [r5] DropBox
  - [r6] Email
  - [r7] FTP
  - [r8] Google Drive
  - [r9] Internal network folders
  - [r10] SharePoint
  - [r12] TonicDM
  - [r13] Deltek Collaboration
  - [r11] Other (please specify)
- 

**[PM13a] Does your firm complete internal project performance evaluations?**

**Row:**

- [r1] Yes
  - [r0] No
- 

**[PM13b] For what types of projects does your firm complete internal project performance evaluations?**

**Row:**

- [r1] All projects
- [r2] Strategic projects
- [r3] New clients only

**[PM13c] In 2021, is your firm considering conducting internal project performance evaluations?**

**Row:**

[r1] Yes

[r0] No

---

**[PM14a] For what types of projects does your firm currently measure client satisfaction?**

**Row:**

[r1] All projects

[r2] Strategic projects

[r3] New clients only

**[PM14b] In 2021, is your firm considering measuring client satisfaction?**

**Row:**

[r1] Yes

[r0] No

**[PM15] How frequently does your firm typically measure client satisfaction?**

**Row:**

[r1] Annually

[r2] At the end of the project

[r3] At key project milestones

[r4] Irregularly

**[PM16a] By what means does your firm typically obtain client satisfaction input?**

**Row:**

[r1] In person

[r2] Phone

[r3] Electronic survey

[r5] Informal through project discussions

[r4] Multiple means

**[PM16b] Who at your firm typically contacts clients about their satisfaction?**

**Row:**

[r1] Project member

[r2] Project manager

[r3] Executive team

[r4] Third-party organization

---

**[PM17] What does your firm do well relative to your project management processes?**

*Rank your top three choices with #1 being the top strength.*

**Row:**

[r1] Qualified project managers

- [r2] Strong project management procedures
- [r3] Well-defined scope
- [r4] Having the right software tools
- [r5] Alignment with executive management
- [r6] Accurate project cost and timeline forecasting
- [r7] Collaboration and communication
- [r8] Schedule viability/schedule maturity
- [r9] Manage client relationships

**Choice:**

- [ch1] 1st
- [ch2] 2nd
- [ch3] 3rd

**[PM17a] In what additional project management processes does your firm excel?**

---

**[PM18] Over the next 3 years, what will be the top 3 challenges facing your firm's project management function?**

*Rank your top three choices with #1 being the top challenge.*

**Row:**

- [r1] Staff shortages
- [r2] Insufficient or poorly executed project management procedures
- [r3] Poorly defined scope
- [r4] Collaboration and communication
- [r5] Accurate project cost and timeline forecasting (ETC/EAC)
- [r6] Managing project information (e.g., drawings, documents, emails)
- [r7] Competing priorities, including project management, design, business development, etc.
- [r8] Inexperienced project managers
- [r9] Having the right software tools

- [r10] Schedule viability/schedule maturity
- [r11] Alignment with executive management
- [r12] Accountability

**Choice:**

- [ch1] 1st
- [ch2] 2nd
- [ch3] 3rd

**[PM18a] What additional project management challenges, if any, does your firm experience?**

---

**[PM19] What initiatives do you plan to pursue over the next 3 years to address your firm's top project management challenges?**

*Rank your top three choices with #1 being the most important.*

**Row:**

- [r1] Invest in better software tools
- [r2] Invest in internal PM training
- [r3] Develop a PM discipline or center of excellence
- [r4] Develop internal PM best practices
- [r5] Improve project information management processes
- [r6] Develop and track formal KPIs and project status
- [r7] Invest in external PM training
- [r8] Develop formal project risk management programs
- [r9] Hire more qualified staff
- [r10] Formal PMP certification
- [r11] More clearly defined responsibilities for project management, business development, and design
- [r12] Hire more production staff

**Choice:**

[ch1] 1st

[ch2] 2nd

[ch3] 3rd

**[PM19a] What additional project management initiatives is your firm implementing?**

---

**[PM20] What phase of the project lifecycle is typically the most challenging to execute for your company?**

**Row:**

[r1] Bidding/Proposal (Contract Award)

[r2] Initiation Phase (Contract Kickoff)

[r3] Planning Phase

[r4] Execution Phase

[r5] Closure Phase

**[PM24] Why is that phase of the project lifecycle typically the most challenging to execute for your company?**

---

**[PM21] What construction specification software does your firm use?**

*Select all that apply.*

**Row:**

[r1] ARCAT

[r2] AIA MasterSpec

[r3] BSD SpecLink

[r7] SpecsIntact

[r4] Other (please specify)

[r5] N/A or none

---

**[PM22] What are the top 3 challenges your company faces with construction specifications?**

*Rank your top three choices with #1 being the biggest challenge.*

**Row:**

[r1] Lack of specification writers on staff

[r2] Lack of integrated technologies (ex. Drawings and specs in parallel)

[r3] Limited collaboration with design team

[r4] Challenges collaborating across the project team to create a complete specs package

[r5] Time to research and identify the right products

[r6] Time to produce complete project spec package

[r7] Reliable and up-to-date building product information

[r8] Resources to maintain firm's office masters up-to-date

**Choice:**

[ch1] 1st

[ch2] 2nd

[ch3] 3rd

**[PM22a] What additional challenges does your company face with construction specifications?**

---

**[PM23] What are the top 3 challenges your teams face managing project information?**

*Rank your top three choices with #1 being the top challenge.*

**Row:**

[r1] Office/project site coordination

[r2] Managing project email

[r3] Administrative workload

[r4] Project document workflows

[r5] Managing submittals and RFIs

[r6] Sharing project files with all team members effectively

[r7] Project collaboration for deliverables

[r8] Managing quality of deliverables

**Choice:**

[ch1] 1st

[ch2] 2nd

[ch3] 3rd

**[PM23a] What additional challenges does your company face with managing project information?**

**This is the last question for the Project Management section.** If you wish to review and modify your answers, please use the “Back” button.

---

## **AE – Human Capital Management**

This section asks about human capital management and human resources metrics within your company, including employee headcount, average time required to fill open positions, career development initiatives, employee benefits, and HR challenges and initiatives.

---

**[HCM1] What was your firm’s headcount at the beginning and end of the year 2020?**

*Include full-time equivalent (FTE) employees who received a W-2, T-4, or equivalent. Round to the nearest whole number.*

**Row:**

[r1] Start of Year

[r2] End of Year

[r3] New Hires

[r4] Voluntarily Terminated

[r5] Involuntarily Terminated

---

**[HCM1a] Of those voluntarily terminated, how many are considered ‘Regrettable Attrition’?**

**[HCM2] How many additional employees did your firm pay in 2020? (Part-time, special projects, etc.)**

---

[HCM3] At the end of 2020, approximately how many employees did your firm have in each of the following categories?

Technical and Professional: Includes principals and all technical and professional staff that work on projects. Marketing and Business Development: Includes all marketing employees who spend all of their time on marketing-related tasks. Financial/Accounting: Includes all financial/accounting employees who are dedicated resources to this function. Technology/IT: Includes all employees who have full-time responsibility for supporting the company’s hardware, software, and communication systems. Human Resources: Includes human resources staff not counted within other functions. Administrative or Clerical: Includes administrative support employees who are more than 50% billable. Other Executive Staff Members: Includes executive staff not counted within other functions. Other Employees: Includes any additional employees.

---

*Report in terms of Full Time Equivalent (FTE). Round to the nearest whole number.*

**Row:**

- [r1] Technical and Professional
  - [r2] Marketing and Business Development
  - [r3] Financial/Accounting
  - [r4] Technology/IT
  - [r5] Human Resources
  - [r6] Administrative or Clerical
  - [r7] Other Executive Staff Members
  - [r8] Other Employees
- 

**[HCM4] Does your firm have more, fewer, or about the same number of open**

**positions compared to this time last year?**

**Row:**

[r1] More open positions

[r2] About the same

[r3] Fewer open positions

---

**[HCM5] For what reason does your firm have more open positions this year?**

**Row:**

[r1] Growth

[r2] Cannot fill existing positions

[r3] Both growth and cannot fill existing positions

---

**[HCM6] Does your firm offer the following employee benefits?**

*For each item, select yes or no.*

**Column:**

[c1] Yes

[c0] No

**Row:**

[r1] Medical

[r2] Tuition reimbursement

[r3] Ownership/stock option opportunity

[r4] 401(k), pension, or other retirement fund

[r5] Wellness or fitness programs

[r6] Family-focused programs—adoption, infertility treatments, etc.

- [r7] Performance bonus
  - [r8] Company-paid professional registrations
  - [r9] Work from home
  - [r10] Flexible hours
  - [r11] Paid overtime
  - [r13] Mentorship programs
  - [r12] Other (please specify)
- 

**[HCM7] Which business processes are most expensive (time and cost) for your firm to support?**

*Rank your top three choices with #1 being the most expensive.*

**Row:**

- [r1] Open enrollment for benefits
- [r2] Employee record maintenance
- [r3] Human Capital Management budgeting and forecasting
- [r4] Compliance assurance
- [r5] Talent Acquisition process
- [r6] Annual performance reviews
- [r9] Quarterly performance reviews
- [r10] Bi-annual performance reviews
- [r7] Developing learning programs for employees
- [r8] Succession planning

**Choice:**

- [ch1] 1st
- [ch2] 2nd
- [ch3] 3rd

**[HCM7a] What additional business processes are most expensive (time and cost) for your firm to support?**

---

**[HCM8] Which of the following solutions is your firm primarily using today to help manage its human resources?**

*Select one.*

**Row:**

[r22] ADP Workforce Now

[r25] Bamboo HR

[r21] Custom-built/Homegrown

[r23] Deltek Talent Management

[r26] Oracle HCM Cloud

[r5] PeopleSoft HR

[r18] RedVector

[r10] SilkRoad

[r20] Third-party payroll HRIS

[r24] UltiPro

[r14] Workday

[r27] Other (please specify)

[r28] None

**[HCM8a] What additional solutions is your firm using today to help manage its human resources?**

---

**[HCM9] Are any of your firm's current HR applications integrated (automated data flow) with your ERP system?**

**Row:**

[r1] Yes

[r0] No

[r98] Not sure

---

**[HCM10] When was the last time your firm significantly added to or replaced its HR solutions?**

**Row:**

[r1] Within the last year

[r2] 1+ to 3 years ago

[r3] 3+ to 5 years ago

[r4] More than 5 years ago

---

**[HCM11] Does your firm offer professional development opportunities through any of the following?**

*Select all that apply.*

**Row:**

[r1] Professional licenses

[r2] Professional certifications

[r3] Conference attendance

[r4] Continuing education reimbursement

[r5] Formal learning programs

[r6] First-line supervisor leadership development programs

[r7] Middle management leadership development programs

[r8] Executive experiential leadership programs

[r9] High-potential programs

[r10] Rotational job assignments

[r11] Mentoring programs

[r12] Ability to participate as volunteer for community projects

[r13] Other (please specify)

---

**[HCM12] Does your firm have a Learning Management System (LMS)?**

**Row:**

[r1] Yes

[r0] No

---

**[HCM12a] What have been the top challenges your firm has experienced with user adoption of the learning programs within the LMS?**

*Select all that apply.*

**Row:**

[r1] Employees don't have time

[r2] Building the content and programs

[r3] Managers not evangelizing the value of learning

[r4] Other

---

**[HCM13] What technology is your firm leveraging for recruiting and interviewing?**

*Select all that apply.*

**Row:**

[r1] Blind interviews

[r2] Video interviews

[r3] Artificial Intelligence interviews

[r4] Mobile-friendly careers platform

- [r5] Candidate management solution
  - [r6] Automatic reminders for passive candidates
  - [r7] Passive recruiting through social media, etc.
  - [r8] Post-interview process candidate surveys
  - [r9] Other (please specify)
- 

**[HCM14] What are the top 3 tools your firm uses to develop staff?**

*Rank your top three choices with #1 being the most important.*

**Row:**

- [r1] External education programs
- [r2] Leadership development programs
- [r3] High-potential programs
- [r4] Coaching and mentoring
- [r5] Job rotations
- [r6] eLearning opportunities

**Choice:**

- [ch1] 1st
- [ch2] 2nd
- [ch3] 3rd

**[HCM14a] What additional tools does your firm use to develop staff?**

---

**[HCM15] What is your firm's average time to fill a position?**

**Row:**

- [r1] 0–30 days
- [r2] 31–60 days
- [r3] 61–90 days

[r4] >90 days

**[HCM16] What percentage of your company's workforce comes from each of the following generations?**

**Row:**

[r1] Gen Z/Digital (individuals born after 1995)

[r2] Gen Y/Millennials (individuals born between the years 1981 and 1995)

[r3] Gen X (individuals born between the years of 1961 and 1980)

[r4] Baby Boomers (individuals born between the years 1945 and 1960)

---

**[HCM17] What levels of management are in your firm?**

*For each item, select yes or no.*

**Column:**

[c1] Yes

[c0] No

**Row:**

[r1] Top-level Management (e.g., President, V.P., Chairman of the Board)

[r2] Middle Level Management (e.g., Department Head, Branch Manager)

[r3] Lower Level Management (e.g., Supervisors, Office Manager)

---

**[HCM17a] In your firm, what percentage of top-level management positions (e.g., President, V.P., Chairman of the Board) are held by these generations?**

**Row:**

[r1] Gen Z/Digital (individuals born after 1995)

[r2] Gen Y/Millennials (individuals born between the years 1981 and 1995)

[r3] Gen X (individuals born between the years of 1961 and 1980)

[r4] Baby Boomers (individuals born between the years 1945 and 1960)

**[HCM17b] In your firm, what percentage of middle-level management positions (e.g., Department Head, Branch Manager) are held by these generations?**

**Row:**

[r1] Gen Z/Digital (individuals born after 1995)

[r2] Gen Y/Millennials (individuals born between the years 1981 and 1995)

[r3] Gen X (individuals born between the years of 1961 and 1980)

[r4] Baby Boomers (individuals born between the years 1945 and 1960)

**[HCM17c] In your firm, what percentage of lower-level management positions (e.g., Supervisors, Office Manager) are held by these generations?**

**Row:**

[r1] Gen Z/Digital (individuals born after 1995)

[r2] Gen Y/Millennials (individuals born between the years 1981 and 1995)

[r3] Gen X (individuals born between the years of 1961 and 1980)

[r4] Baby Boomers (individuals born between the years 1945 and 1960)

---

**[HCM18] Have you experienced any of these events in the last year?**

*Select all that apply.*

**Row:**

[r1] Merger

[r2] Acquisition

[r3] Reduction in force

[r4] Hiring outside the country

[r5] Challenges adhering to new laws and regulations

[r111] None of the above

---

**[HCM19] Which of the following key performance indicators is your firm currently tracking?**

*Select all that apply.*

**Row:**

- [r1] Revenue per FTE
  - [r2] Time lag between employee process steps
  - [r3] Percentage of accepted offers
  - [r4] Time to fill positions
  - [r5] Percentage of your workforce being promoted
  - [r6] Voluntary turnover
  - [r7] Involuntary turnover
  - [r15] Regrettable attrition
  - [r8] Employee retention
  - [r9] Employee engagement
  - [r10] Lead time from hire to billable
  - [r11] Resume-to-hire ratio by position
  - [r12] Applicant satisfaction
  - [r13] Average cost per hire
  - [r14] Other (please specify)
- 

**[HCM20a] What percentage of your offers in 2020 were accepted?**

---

**[HCM21a] What is your average lead time from hire to billable in days?**

---

**[HCM22] Do you conduct any of the following employee engagement surveys?**

*For each item, select yes or no.*

**Column:**

[c1] Yes

[c0] No

**Row:**

[r1] Pulse surveys

[r2] Annual employee surveys

[r3] Applicant satisfaction

[r4] 360 evaluations

[r5] Employee exit interviews/surveys

[r6] Employee benefit satisfaction survey

---

**[HCM23a] Does your firm have a formal succession plan?**

**Row:**

[r1] Yes

[r0] No

---

**[HCM23b] Who does the formal succession plan apply to within your firm?**

**Row:**

[r1] All employees

[r2] High-potential employees

[r3] First-line leaders

[r4] Current leaders and next-in-line leaders

---

**[HCM24a] Does your firm have a formal career development plan?**

**Row:**

[r1] Yes

[r0] No

---

**[HCM24b] Who does the formal career development plan apply to within your firm?**

**Row:**

[r1] All employees

[r2] High-potential employees

[r3] First-line leaders

[r4] Current leaders and next-in-line leaders

---

**[HCM25] Does your firm have a skills repository that helps you resource and acquire staff for its projects?**

**Row:**

[r1] Yes

[r0] No

---

**[HCM26] What will be the top 3 challenges in acquiring new staff for your firm in the next 3 years?**

*Rank your top three choices with #1 being the most important.*

**Row:**

[r1] The ability to offer competitive benefits to candidates

[r2] Matching qualified candidates to open positions

[r3] Making better use of social media as an acquisition channel

[r4] Faster onboarding of new employees

[r5] The availability of good candidates in the marketplace

[r6] The ability to offer competitive compensation to candidates

[r7] Aligning acquisition goals with the strategic goals of your company

[r8] Developing a more effective employee referral program

**Choice:**

[ch1] 1st

[ch2] 2nd

[ch3] 3rd

**[HCM26a] What additional challenges does your firm have related to acquiring new staff?**

---

**[HCM27] What will be the top 3 initiatives for acquiring new staff for your firm in the next 3 years?**

*Rank your top three choices in order of importance with #1 being the top initiative.*

**Row:**

[r1] Creating or improving employee referral incentives

[r2] Increasing your internal HR staff

[r3] New talent acquisition solution

- [r4] Outsourcing more recruitment activities
- [r5] Tracking passive candidates
- [r6] Improve onboarding processes and procedures
- [r7] Provide better benefits to be more competitive in the market
- [r8] Improve compensation offering
- [r9] Improve perception of firm in the marketplace to attract better talent

**Choice:**

- [ch1] 1st
- [ch2] 2nd
- [ch3] 3rd

**[HCM27a] What additional initiatives for acquiring new staff is your firm implementing?**

---

**[HCM28] What are your firm's top 3 challenges in managing human resources?**

*Rank your top three choices in order of importance with #1 being the top challenge.*

**Row:**

- [r1] Learning and development programs
- [r2] Performance management
- [r3] Workforce capacity and planning
- [r4] Retaining employees
- [r5] Wellness programs
- [r6] Succession and career development planning
- [r7] Reward and recognition programs
- [r8] Employee engagement/experience

**Choice:**

- [ch1] 1st
- [ch2] 2nd
- [ch3] 3rd

**[HCM28a] What additional challenges does your firm have related to managing human resources?**

---

**[HCM29] What are your firm's top 3 initiatives for managing human resources in the next 3 years?**

*Rank your top three choices in order of importance with #1 being the top initiative.*

**Row:**

[r1] Create/improve employee engagement programs

[r2] Invest in a human capital management solution

[r3] Develop a better employee promotion program to reward success

[r4] Improve employee resource management programs and procedures

[r5] Create/improve succession and career development planning

[r6] Improve employee rewards and recognitions program

[r7] Create/improve mentorship program

[r8] Develop more formal career development programs

**Choice:**

[ch1] 1st

[ch2] 2nd

[ch3] 3rd

**[HCM29a] What additional initiatives to address human resources challenges is your firm implementing?**

---

**[HCM30] Are there specific challenges your firm faces in human capital management because it is a project-based business?**

**This is the last question for the Human Capital Management section.** If you wish to review and modify your answers please use the "Back" button.

---

**[RC1] Respondent Contact** Thank you for responding to the 41st Annual Clarity A&E survey. If you would like to receive your calculated responses, as well as an exclusive preview of the survey results, please enter your email and contact information below.

**Row:**

[r1] Company Name

[r2] Email Address

[r3] First Name

[r4] Last Name

**[RC2]** If you would like to retake the survey, edit your responses, or take additional sections, please select "Yes" below and you will be returned to the beginning of the survey. Otherwise, select "No" or simply click Continue.

**Row:**

[r1] Yes

[r0] No

---