Environmental Financial Consulting Group

2023
Technology Leadership Conference Agenda

For Architecture, Engineering, and Consulting Firms

June 8th-9th
Thursday - Friday

Microsoft
Technology Center

200 East Randolph Drive
Suite 200
Chicago, IL 60601

In Partnership With Bentley   **Sponsored By** Microsoft Deltek.

Technology Leadership Conference
For Architecture, Engineering, and Consulting Firms

Event Overview

Images of the Microsoft Technology Center

EFCG is the leading advisor to AEC firms

EFCG's mission is to provide a data-driven and strategic edge to Architecture, Engineering, and Consulting (AEC) firms to advance the innovation, sustainability, and success of the industry. In the last 33 years, EFCG has served as a retained advisor to 500+ firms, developed a proprietary industry database of financial and business metrics, held nearly 100 executive conferences, and advised on 180+ M&A transactions. The relationships we have formed with the leadership teams at every major AEC firm make us the most trusted financial, strategic, and M&A advisor.

Dates & Times
Thursday, June 8th: 8:30 am – 8:00 pm Central Time
Friday, June 9th: 8:30 am – 1:30 pm Central Time

Venue Location
Microsoft Technology Center: 200 East Randolph Drive, Suite 200, Chicago, IL 60601

Photography & Press
Recordings and images from the event may be used for live or on-demand sessions, EFCG materials, or by other participating firms in their own promotions. If you prefer not to be recorded or photographed, please let EFCG know. Press will be invited to the event and may publish articles on the event and its sessions.

Attire
All Events: Business casual

Thursday Reception

Remedy @ Cloud Level
70th Floor, Aon Center

View from Remedy, 70th Floor of Aon Center

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8:00 am – 8:30 am	**Aon Center Security and Building Check-in**
	Coffee will be available upon arrival at the Microsoft Technology Center.
8:30 am – 9:00 am	**Conference Reception, Pick Up Name Tags - Main Reception/Lounge Area**
	Breakfast and Conversation – Innovation Factory **Optional Guided Tour of Microsoft Technology Center (MTC)**
	Enjoy morning coffee, breakfast, and conversation with fellow participants to start the day. Microsoft will provide a tour departing at 8:40 of the MTC from the Innovation Factory.
9:00 am – 9:10 am	**Transition to Multi-Purpose Room (MPR) for Welcome Plenary Session**
9:10 am – 9:20 am	**Welcome and Introduction to the Day, (MPR)**
	Hosts: Marcus Quigley, EFCG Partner, Technology Practice Rebecca Zofnass, Julie Hasiba, Jessica Barclay, EFCG Managing Partners Claire Rutkowski, Bentley Systems SVP, CIO Champion James Colins, General Manager Public Sector Industry, Microsoft
9:20 am – 10:30 am	**Session 1: AEC Industry Overview: Critically Assessing the Data (MPR)**
	Over both the short and long term, the AEC Industry has proven to be more resilient than the broader economy. What are the key areas to be paying attention to now and what have we learned from collecting over 1MM survey responses in the past 34 years? During this presentation, EFCG will disclose the results of the 2022 CEO Survey and expand on the impact of these results on the industry and your firm.
	Presenter: Rebecca Zofnass, EFCG Managing Partner, Financial & Strategic Advisory
10:30 am – 10:45 am	**Morning Coffee Social – Cafe Outside of MPR**
10:50 am – 11:30 am	**Session 2: Building and Leading Technology-Forward Companies (MPR)**
	In recent years, the industry has undergone significant changes, particularly in the technology landscape. This session explores new ways of working and how technology is being leveraged to enhance employee and client experiences. We'll discuss leadership in this new era and how firms are using technology for growth and to foster high-performance cultures and build successful internal innovation programs.
11:40 am – 12:30 pm	**Session 3: Keynote and Discussion: AI - Brave New World or Golden Age? (MPR)**
	Join us for an engaging and thought-provoking discussion on the future of AI and its potential impact on our industry. Will AI usher in a new golden age of technological advancement and outcomes, bringing new solutions to complex problems? Or will it lead to a brave new world fraught with challenges and ethical dilemmas? We will explore these questions and more, providing insights into the opportunities and challenges that lie ahead.

EFCG advances the innovation, sustainability, and success of the AEC industry

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(all times in CDT)

12:30 pm – 1:30 pm **Lunch and Conversation (Innovation Factory)**

1:30 pm – 2:15 pm **Session 4: Creating Systems of Digital Twins (MPR)**

The adoption of digital twins in AEC firms is becoming prevalent as the pace of change in our industry accelerates. During this session we will hear from several firms on when and how they are using digital twins, as well as discussing the underlying technology and how it can be leveraged to incorporate data far beyond design and construction for use throughout the supply chain. We will discuss obstacles, ways to overcome them, and potentials for finding new revenue streams for your firms.

2:30 pm – 3:30 pm **Session 5: Breakouts**

These breakouts provide an opportunity to enter into conversation with firms using technology as a central part of their strategy.

Breakout 5A: Firm 1 Digtial Services Demo (MPR)
Moderator: Microsoft

Breakout 5B: Firm 2 Digtial Services Demo (Envisioning Center)
Moderator: Claire Rutkowski, Bentley Systems, SVP, CIO Champion

Breakout 5C: Firm 3 Digtial Services Demo (EBC)
Moderator: Marcus Quigley, EFCG Partner, Technology Practice

3:30 pm – 3:45 pm **Afternoon Break**

3:45 pm – 4:30 pm **Session 6: Unprecedented Industry Tailwinds: Update on Federal Funding and Leveraging Responsible AI for the Enterprise (MPR)**

The combination of unprecedented federal funding of infrastructure and the availability of new technologies positions CTOs and CIOs to not just support organizations, but to lead firms forward. In lively this end of day session we will first get an update on the progress of federal infrastructure funding and then continue the discussions from earlier in the day on the future of the enterprise under your leadership.

5:00 pm – 7:30 pm **Reception & Dinner (Remedy @ Cloud Level, 70th Floor, Aon Center)**

Enjoy dinner and drinks with colleagues to finish the day.

2023 EFCG Conferences

RLC 2023	**Rising Leaders**	January 26-27, 2023
CFO 2023	**Chief Financial Officer**	April 19-21, 2023
HR 2023	**HR Leadership**	May 8-10, 2023
TECH 2023	**Technology Leadership**	June 8-9, 2023
CEO 2023	**Chief Executive Officer**	September 18-20, 2023

EFCG Offerings For Your Firm

Peer Benchmarking Analysis & Valuations

M&A Advisory

Sustainability & ESG Strategy

Technology Strategy

Talent Strategy

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Friday, June 9, 2023
(all times in CDT)

8:30 am – 9:00 am   **Breakfast**

Enjoy morning coffee, breakfast, and conversation with fellow participants to start the day.

9:00 am – 9:50 am   **Session 7: Foundational Technology and The Future of Coding (MPR)**

Foundational technologies (e.g., CRM systems, ERP systems, communication & collaboration tools, internal design automation platforms) can vastly dictate how efficient and / or effective a firm operates. EFCG will start the discussion by presenting the results of our 2023 Foundational Technology Survey and we will discuss how foundational technologies have transformed internal processes and how firms are making strategic investments to prepare for their client's future needs. We will continue the discussion to talk about how software development is undergoing a radical transformation as neural networks and machine learning (ML) techniques are increasingly used to help generate code and create new applications.

9:50 am – 10:15 am   **Morning Coffee Social – Cafe Outside of MPR**

10:15 am – 11:15 am   **Session 8: Breakouts and Conversations**

Breakout and Discussion 8A – Winning the Long Game: Succession Planning in the CTO Role (MPR)

As a CTO or CIO, you are responsible for leading your organization's technology strategy, innovation, and transformation. You are also expected to develop and mentor the next generation of technology leaders. How do you create a succession plan that is flexible, objective, and people-centric?

Breakout and Discussion 8B – Dealing with Talent Shortages and Rapid Turnover (EBC)

The demand for civil engineers is high, but the supply is low. The pandemic, the recession, and the aging workforce have contributed to this situation. Moreover, civil engineering suffers from a lack of diversity and a shortage of skilled professionals in areas such as software engineering and applied technology. This session will explore how firms are starting to address these talent and turnover challenges.

Breakout 8C – Connecting with Your CEO and CFO - Top 10 Metrics AEC Leaders Need to Be Paying Attention To (Envisioning Center)

EFCG will take a deep dive into 10 key metrics critical for any AEC leader to watch.

11:15 am – 12:15 pm   **Session 9: Leveraging Data for Better Outcomes: Getting the Most Out of Your IP (MPR)**

Locked within filing cabinets, in offsite cold storage, and in digital repositories lies a vast collection of IP that your firm has created over decades and often for thousands of clients. What is the value of this data now? How can this data be unlocked and leveraged? Has the value of this data dramatically increased now that AI fine-tuning has arrived? This session's panel will discuss what approaches for today can position firms well for tomorrow.

12:15 pm – 1:00 pm   **Session 10: To Build or Not To Build: How to Partner Well to Accelerate Growth and Outcompete (MPR)**

One of the key decisions you must make is whether to build or buy technology solutions. Building your own solutions can give you more control, customization, and differentiation, but it can also be costly, time-consuming, and risky. Buying solutions from external partners can save you time and money, but it can also limit your flexibility, quality, and competitive edge. How do you find the right balance between building and buying? How do you choose the best partners for your business goals? How do you establish win-win relationships that drive strong business growth?

1:00 pm – 1:30 pm   **Closing Coffee and Box Lunch**

Questions?
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Visit www.efcg.com

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Chicago Activities

Eat...

Girl & the Goat | Bold, Global Flavors
809 W. Randolph Street, Chicago, IL 60607

The Purple Pig | Pizzeria and Pub
444 Michigan Avenue, Chicago, IL 60611

Aba| Mediterranean
302 N. Green Street, 3rd Floor, Chicago, IL 60607

The Publican| Beer, Pork, & Oysters
837 Fulton Street, Chicago, IL, 60607

Barnelli's | Portillo's | Pasta Bar
100 W Ontario Street, Chicago, IL 60654

Drink...

Eleven City Diner| Breakfast and Coffee
1112 S. Wabash Street, Chicago, IL 60605

Wildberry Pancakes and Cafe| Breakfast and Coffee
130 E. Randolph Street, Chicago, IL 60601

La Colombe | Café, Fresh Roasted Coffee
955 W. Randolph Street, Chicago, IL 60607

The Drifter | Cocktails and Speakeasy
676-8 N Orleans Street, Chicago, IL 60654

Lazy Bird | Cocktail Bar
200 N Green Street, Chicago, IL 60607

Enjoy...

Choose Chicago: Things to Do, Events, Restaurants
Chicago Attractions & Tours

Highlights:
- ❖ **Chicago Food Tours**
- ❖ **The Museum Campus**
- ❖ **Navy Pier**
- ❖ **Chicago Breweries [Downtown Loop & South Loop]**
- ❖ **Millennium Park**
- ❖ **Summer Music Series @ Millennium Park**

Extending Your Stay?
- ❖ **Chicago Blues Festival**
- ❖ **Chicago Theatre and Performing Arts**
- ❖ **Chicago Architecture Tours**