



EFCG

Environmental Financial
Consulting Group

2024 TECHNOLOGY LEADERSHIP CONFERENCE

Preliminary Agenda

For the Architecture, Engineering, and Consulting (AEC) Industry

June 10-12, 2024

200 E Randolph Street, Chicago, IL

 Microsoft®

Technology Center



Sponsorship Partners

 **BST Global™**

 Microsoft®

Deltek.

WELCOME



EFCG

Environmental Financial Consulting Group

TECHNOLOGY LEADERSHIP CONFERENCE

June 10-12, 2024



ABOUT EFCG

The Environmental Financial Consulting Group (EFCG) is the leading advisor to architecture, engineering, and consulting (AEC) firms. Its mission is to provide a data-driven and strategic edge to AEC firms to advance the innovation, sustainability, and success of the industry. We provide end-to-end, integrated solutions to support executive leaders with their most critical strategic and financial decisions.

In the last 35 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 200+ M&A transactions. The relationships we have formed with the executive teams at every major AEC firm make us the most trusted corporate finance, strategic, and M&A advisor.

 **EFCG is the leading advisor to AEC firms, providing expertise in:**

Management Consulting



- Strategic Planning
- Corporate Financial Benchmarking
- Valuations
- Talent & Compensation
- Technology & Innovation
- Sustainability & ESG

Mergers & Acquisitions



- Sell- & Buy-Side Assignments
- Capital Structure Analysis
- Corporate Divestitures & Tech Spinouts
- Strategic & Private Equity Partner Engagement
- Integration Planning
- Due Diligence & Market Studies

Leadership Conferences



- Analysis on AEC Trends from EFCG's Proprietary Industry Database
- Perspectives from Subject Matter Experts and Industry Executives
- Invaluable Peer-Networking Opportunities

Advanced Data Analytics & Insights

EFCG has the most comprehensive proprietary database in the industry

6
Annual Surveys

1M+
Data Points Every Year

500+
Database Contributing Firms

WELCOME



EFCG

Environmental Financial
Consulting Group

TECHNOLOGY LEADERSHIP CONFERENCE

June 10-12, 2024



SPONSORSHIP PARTNERS

We are especially thankful for the collaboration we have with our Sponsorship Partners.



BST Global designs, develops and deploys the AEC industry's first suite of AI-powered project intelligence™ solutions. Beyond our flagship ERP offering, we provide work management, predictive insights and resource management solutions to complement a firm's existing ERP. More than 120,000 architects, engineers and consultants in 65 countries across six continents rely on BST Global's solutions each day to successfully manage their projects, resources, finances and client relationships. With unrivaled industry knowledge, BST Global serves as a trusted partner to its loyal clients and remains at the forefront of innovation.

Visit www.bstglobal.com



Better software means better projects. Deltek is the leading global provider of enterprise software and information solutions for project-based businesses. More than 30,000 organizations and millions of users in over 80 countries around the world rely on Deltek for superior levels of project intelligence, management and collaboration. Our industry-focused expertise powers project success by helping firms achieve performance that maximizes productivity and revenue.

Visit www.deltek.com.



Sponsorship Partners





2024 Technology Leadership Conference

(All Times in Central Time)

Monday, June 10, 2024

6:00 pm – 7:30 pm

Conference Welcome Reception

Tuesday, June 11, 2024

8:15 am – 9:00 am

Breakfast Meet-and-Greet with Optional Guided Tour of Microsoft Technology Center

9:00 am – 10:00 am

Session 1: 2024 EFCG AEC Industry Overview: Critically Assessing the Data

10:00 am – 10:30 am

Morning Coffee

10:30 am – 11:15 am

Session 2: Focus on Technology: State of the Industry

11:15 am – 11:30 am

Refresh Break

11:30 am – 12:15 pm

Session 3: Breakout

3A: BST Global Presentation

3B: Effective Evolution: Fully leveraging existing data inside your firm to build integrated and innovative companies

3C: BIM, Digital Twins, and Advanced Visualization in AEC

12:15 pm – 1:00 pm

Lunch

1:00 pm – 2:00 pm

Session 4: Beyond the Hype: Examples of Practical AI Implementation in AEC

2:00 pm – 2:15 pm

Refresh Break

2:15 pm – 3:00 pm

Session 5: Breakout Sessions

5A: Deltek Presentation

5B: Delivering on a Better Client Experience: Client Portals

5C: Technology Talent in a Time of Shortage

3:00 pm – 3:15 pm

Refresh Break

3:15 pm – 4:00 pm

Session 6: Foundational and Applied Technology: Structuring Firms to Move Fast and Be Flexible

4:00 pm – 4:15 pm

Refresh Break

4:15 pm – 4:45 pm

Session 7: Leveraging Intellectual Property in a Data Driven World

4:45 pm – 4:55 pm

Day's Closing Remarks

5:15 pm – 8:00 pm

Evening Networking Reception

Wednesday, June 12, 2024

8:15 am – 9:00 am

Breakfast Reconnect

9:00 am – 10:00 am

Session 8: Lessons Learned in Leveraging Technology: It Takes a Team

10:00 am – 10:15 am

Morning Coffee Social

10:15 am – 11:00 am

Session 9: Beyond the Billable Hour: SaaS and Tech Spin-outs

11:00 am – 11:45 am

Session 10: ESG and Technology for Sustainability

11:45 am – 12:00 am

Refresh Break

12:00 am – 12:45 pm

Session 11: Technology's Role in the Boardroom

12:45 pm – 1:00 pm

Conference Closing Remarks

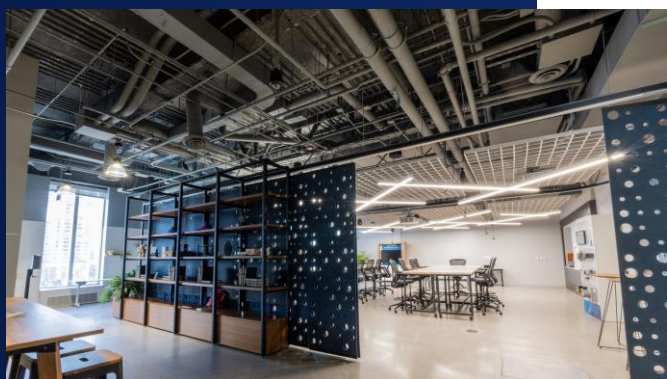
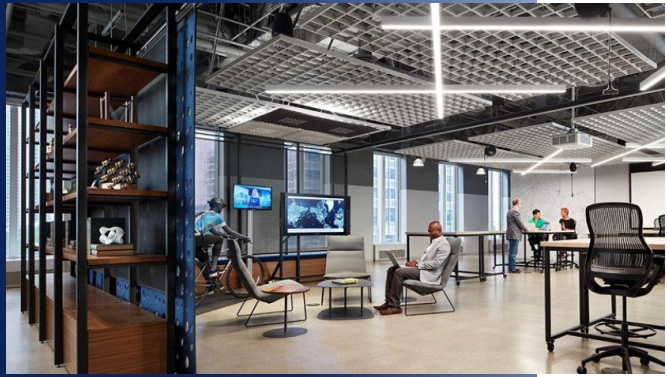
1:00 pm – 2:00 pm

Closing Coffee Conversation & Lunch



2024 Technology Leadership Conference

Event Logistics



Dates & Times

Monday, June 10th 6:00 pm – 7:30 pm CT
 Tuesday, June 11th 8:15 am – 8:00 pm CT
 Wednesday, June 12th 8:15 am – 2:00 pm CT

Venue Location

[Microsoft Technology Center](#)
 200 E Randolph St #200, Chicago, IL 60601

Hotel EFCG Room Block

[Fairmont Chicago Millenium Park](#)
 EFCG has an event room block to provide our attendees with a preferred rate and location close to the conference venue. Attendees will receive a booking link to access the special rate upon registration for the conference.

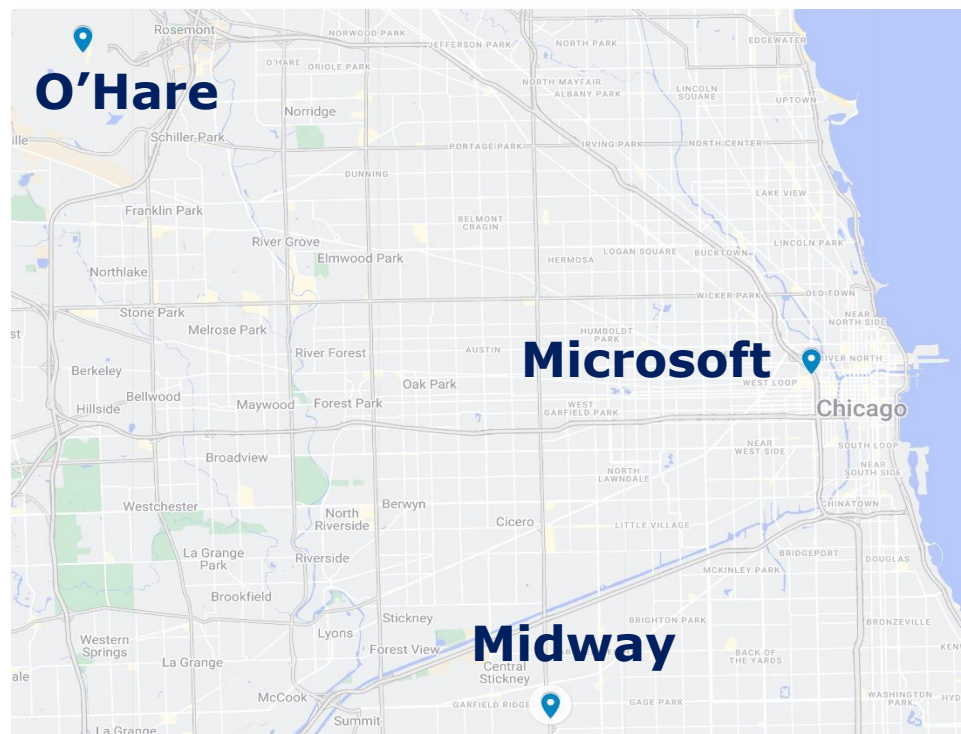
Attire

Business casual

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 in writing at kthieme@efcg.com. Press will be invited to the event and may publish articles on the event and its sessions.

Venue Location to Airport Options



Photographs from Microsoft, Convene and EFCG

Transportation to and From Airport

Airport

Chicago O'Hare International Airport

Chicago Midway International Airport

Outside Rush Hour

30-minute drive

30-minute drive

Rush Hour

60-minute drive

50-minute drive



Chicago Activities

Eat...

Great Food

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

Swift & Sons | Steakhouse
1000 W Fulton Market, Chicago, IL 60607

**The Time Out Market Chicago | Upscale
Taste of Chicago Food & Drink Hall**
916 W Fulton Market, Chicago, IL 60607

Chicago Classics

Lou Malnati's Pizzeria | Deep Dish Pizza
1235 W Randolph St, Chicago, IL 60607

Giordano's | Deep Dish Pizza
223 W Jackson Blvd, Chicago, IL 60606

Portillo's Chicago | Hot Dogs & Italian Beef
520 W Taylor St, Chicago, IL 60607

Al's Italian Beef | Italian Beef
548 N Wells St, Chicago, IL 60654

Morton's The Steakhouse | Steakhouse
65 E Wacker Pl, Chicago, IL 60601



Drink...

Coffee & Brunch

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

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

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

Bars & Cocktails

The Aviary | Cocktails
955 W Fulton Market, Chicago, IL 60607

Guinness Open Gate Brewery – West Loop | Bar
901 W Kinzie St, Chicago, IL 60607

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

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

**Cindy's Rooftop | Restaurant & Cocktail Bar
Overlooking Millennium Park**
12 S Michigan Ave, Chicago, IL 60603

**More Chicago Breweries [Downtown Loop &
South Loop]**

Extending Your Stay?

Chicago Food Tours
The Museum Campus
Navy Pier

Millennium Park

Chicago Theatre and Performing Arts

Chicago Architecture Tours

Family Days at the Museum of Contemporary Art

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