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A study of women CEOs

Their characteristics, differences from their male counterparts, and how to create an environment that fosters women leaders.



**Christina
Zweig
Niehues**

Women are scarce at the top of the org chart in both the AEC industry and the business world at large – just 6 percent of Fortune 1000 CEOs and a little more than 10 percent of AEC industry CEOs (according to Zweig Group data) are women. I recently read a report by the Korn Ferry Institute, “[Women CEOs Speak: strategies for the next generation of female executives and how companies can pave the road.](#)” The report describes a study of the characteristics of this small population, some of the differences between women CEOs and their male counterparts, and the efforts organizations can use to be receptive to and create an environment for future women leaders. I’ve summarized just a few of the many takeaways from this report below.

What drives this small percentage of women to achieve this high level of success? What defining characteristics set them apart? In order to answer this question, particularly with a focus on how this success can be replicated, Korn Ferry Institute studied 57 women who have been a CEO – 38 currently and 19 previously – at Fortune 1000-listed companies and others of similar size. With more than 40 percent of the women CEOs in this study holding an undergraduate degree in science, math, or engineering, there’s a strong argument that the suggestions in this report apply to the AEC industry.

Being driven by and seeking out challenges was a common attribute among the women studied. Challenge scores on the Korn Ferry assessment were in the 79th percentile for these women, indicating that these women not only preferred but sought out difficult work assignments. Low scores, 24th percentile, were seen in areas related to structure, or a desire for stability and predictability in work. Taken together, these scores suggest these women CEOs are deeply unmotivated by predictable jobs, and highly desirous of variety and a chance to tackle new problems.

What motivates these women?

The CEOs interviewed said they were motivated by a sense of purpose – the thought that one’s company could have a positive impact on its employees, community, or the world at large. In 68 percent of the interviews, CEOs gave detailed descriptions of creating a more positive culture and 23 percent considered this among their most important accomplishments.

The report also stated that this manifested in a higher percentage of women becoming interested in “turn-arounds” or becoming CEOs in organizations currently experiencing poor performance. In AEC firms, this research suggests women leaders may be

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ON THE MOVE

STEWART ANNOUNCES EXECUTIVE LEADERSHIP PROMOTIONS Stewart, an interdisciplinary design, engineering and planning firm, announced it has promoted Lee Anne Nance to chief operating officer, executive vice president and welcomed Rebecca Ackerson to the executive leadership team as chief financial officer, vice president. As members of Stewart's executive team, Nance and Ackerson play key roles in the development and execution of the company's strategic plans and programs.

"In addition to being experts in their respective fields, Lee Anne and Rebecca are excellent stewards of our company culture and values, leading by example through every aspect of the business they touch. We are honored to have them serving at this greater capacity and look forward to the perspectives they bring to their new roles," said Willy Stewart, CEO and founder of Stewart. "As our executive leadership team continues to grow, the presence of varied backgrounds and expertise will help us continue to grow both our company culture and our business."

As COO, Nance's primary responsibilities will be to develop business strategies to increase the growth and success of the company's practice areas as well as oversee the implementation of each practice area's strategic goals. She will also continue to play a pivotal role in promoting Stewart's culture, mission, and values, sustaining initiatives started in her most recent role as chief strategic officer.

As CFO, Ackerson will be responsible for planning, implementing, managing, and controlling Stewart's financial-related activities. In addition to overseeing accounting and payroll functions, Ackerson will establish financial operational strategies and long-term financial planning needs of the company.

Most recently, Ackerson served as controller at Stewart where she oversaw compliance with all regulatory and internal controls.

Nance holds undergraduate and graduate degrees in economics from North Carolina State University. Ackerson holds undergraduate and graduate degrees in accounting from Meredith College and North Carolina State University, respectively.

Stewart is located throughout the Carolinas, with offices in Raleigh, Durham, Wilmington, and Charlotte, North Carolina, and Columbia, South Carolina. With a unique interdisciplinary collaborative approach that results in stronger and more creative design solutions, Stewart serves domestic and international clientele, offering a full range of services to meet the needs of its clients, including civil engineering, geomatics, geotechnical and construction services, landscape architecture, municipal planning and mobility, sports and events, structural engineering, transportation. Stewart is a certified Historically Underutilized Business with the State of North Carolina.

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motivated to work at mission-driven firms, or likely to want to instill a higher purpose in their organization.

The report states that being driven to succeed in an organization doesn't always manifest itself in the same way for women as it does for men. The women CEOs studied for this report scored higher in humility than the rest of the population and interviews suggested that they were less likely to self-promote, and less likely to be motivated by traditional career advancement.

Women in the AEC industry who have the propensity to become future leaders may not be motivated by technical or administrative jobs that require repetitive tasks – they also may be less likely to patiently "climb the ladder" or do the necessary politicking to succeed in certain organizations.

The female CEOs in this report were clear about the area where they felt they could've been better prepared: experience with boards and with other external stakeholders. Especially for women who have a background in technical work such as architecture or engineering, these traditional business skills such as operations and financial knowledge are areas where they may need extra experience, mentorship, or education.

There were many valuable takeaways in this report and I'd encourage anyone interested in promoting diversity and inclusion at their organization to take a look at it.

View the full report by visiting bit.ly/2u0TulJ. ➤

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OPINION



Question those financials

“There are many ways to ‘cook the books’ so they show certain results. Here are some typical problems that we see showing up in the financial statements of A/E firms.”



**Mark
Zweig**

A thought occurred to me the other day. I always tell our students in my Small Enterprise Management class at the Walton College that they cannot take any financials they see from a privately-held business at face value. Yet, I don’t know that I have ever cautioned *The Zweig Letter’s* readers similarly about the specific ways these numbers are distorted in A/E firms.

What I am saying is that there are almost always distortions and misrepresentations. Some of these are done willfully, and some occur out of ignorance. And some occur, believe it or not, from following GAAP (generally accepted accounting principles).

There are many ways to “cook the books” so they show certain results. Here are some typical problems that we see showing up in the financial statements of A/E firms:

1) Inaccurate revenue accruals. This is the single most important number you have. Many times individual project managers and/or firm owners will understate or overstate their earnings on a project deliberately or out of ignorance on how to do it. Or they don’t even consider revenue “revenue” until it is billed to a client. This will then potentially affect

every single calculation of utilization or effective multiplier or utilization (in some cases) that gets made based in part on that number. Question it!

2) Inaccurate marketing costs. There are two primary ways this gets misstated. First is that companies roll all project-specific marketing costs into a job once it is won. This is the largest chunk of marketing expenditures and when you do that it looks like the company is spending less on marketing than it actually is. The other way this gets overstated is when anyone is allowed to charge time to marketing with no oversight. People do this because they have nothing billable to do and it looks better to management than “general overhead.”

3) Personal expenses that show up as business expenses. There are so many of these buried in the

See MARK ZWEIG, page 4



ON THE MOVE

BRENNAN NAMED WSP USA REGIONAL DIRECTOR OF STRATEGIC INITIATIVES FOR THE TEXAS/MOUNTAIN REGION WSP USA, a leading engineering and professional services consultancy, has hired Andrew Brennan as Texas/Mountain region's director of strategic initiatives for alternative delivery projects.

Based in the firm's Houston office, Brennan will manage the pursuit and execution of alternative delivery projects covering various markets, including highways, transit and rail, and aviation. He will draw on the firm's extensive experience in alternative project delivery, including design-build and public-private partnerships.

Brennan will also be responsible for implementing the firm's growth strategy in Texas, Colorado, Arizona, New Mexico, Utah, Idaho, Wyoming, and Montana.

"Andrew has a strong background engaging projects throughout the entire lifecycle, from business development through project execution and delivery," said Arpit Talati, regional manager for WSP's Texas/Mountain region. "Our clients in this region plan to implement an unprecedented volume of

projects using alternative delivery methods over the next decade. Andrew's leadership skills and knowledge significantly enhances our ability to support our clients in this endeavor partnering with them to deliver these complex and significant projects."

Prior to joining WSP as a vice president, Brennan served multiple leadership roles for a global engineering services firm, most recently as senior director for Texas transportation design-build projects.

A licensed professional engineer in Texas, Brennan brings more than 25 years of engineering experience to WSP, which includes leading business development and project execution for a variety of large, complex engineering and construction projects in the highway, transit, buildings, environmental and energy markets.

Brennan graduated from the University of Virginia with a bachelor's degree in civil engineering, and Virginia Polytechnic Institute with a master's degree in business administration.

The Texas/Mountain region is home to some

of WSP's largest alternative delivery projects, including the Texas Central high-speed passenger train, ADOT Loop 202 South Mountain Freeway, Austin U.S. 183 Bergstrom Expressway, Dallas Horseshoe interchange, Dallas-Fort Worth Connector, San Antonio LP 1604, Dallas Southern Gateway, Denver Central 70, Lehi I-15 Tech Corridor, Salt Lake City I-15 Bangerter, DART Blue Line Extension, and Denver Southeast Rail Extension.

WSP USA is the U.S. operating company of WSP, one of the world's leading engineering and professional services firms.

Dedicated to serving local communities, WSP USA is made up of engineers, planners, technical experts, strategic advisors and construction management professionals. WSP USA designs lasting solutions in the buildings, transportation, energy, water, and environment markets.

With more than 9,500 employees in 150 offices across the U.S., WSP USA partners with clients to help communities prosper.

MARK ZWEIG, from page 3

costs. Things such as personal use for company cars, sports tickets that are used only by the owners, vacation houses, spouses of owners brought along on business trips, club memberships and dues, vacations ... even childcare for the owners' kids. These "expenses" reduce profitability and create potential tax issues.

4) "Leasing" arrangements with the owners that overcharge the company. Beyond \$40 a square foot for office space in a \$30 per square foot market for offices owned by certain firm principals, the other thing you may find is that all vehicles, computers, survey equipment, drilling rigs, desks, etc., are owned by a principal in a separate corporation that leases them to the A/E firm at excessive rates and reduces profitability. Don't laugh. It's more common than you may think.

"There are almost always distortions and misrepresentations. Some of these are done willfully, and some occur out of ignorance. And some occur, believe it or not, from following GAAP (generally accepted accounting principles)."

5) Family members on the payroll who don't do anything for the company. "Mom," "Grandpa," and each of the kids of the owner(s) may be getting paid to do nothing in an effort to reduce taxable income and move profit dollars out of the firm. Check and see if any of this is going on.

6) "Profit" lines that show profit after excessive or inadequate owner compensation, and/or show post-bonus profitability. You can make any business look

profitable if the owners don't take salaries for the jobs they do, or take ridiculously low salaries. I have seen this on more than one occasion. Conversely, and more commonly, you can make any business look less profitable than it really is by taking higher salaries than you should for a firm of that size. And as far as post-bonus profitability numbers go that include owner bonus payments – they mean absolutely nothing. That is a derived number. Management is in control of it. Showing this number to employees as if it means anything is misrepresentative of how the firm is actually performing. Probe into this.

7) Assets that are either overvalued or undervalued on the balance sheet. Follow proper accounting procedures and assets are valued at cost less depreciation. When a firm has owned real estate for 10 or more years that almost always under-states the real value of it. And other assets – such as office improvements that are capitalized – or software or computers – they may be worth much **LESS** than what is shown on the balance sheet. Not to mention accounts receivable that may be years old and probably uncollectible yet still show up at full value. Start asking questions here.

8) Liabilities that aren't recognized on the balance sheet. Many companies don't reflect accumulated vacation time as a liability. Jobs that have been over-billed yet still have to be completed. Deferred compensation agreements with owners that are unfunded yet may be significant liabilities in the future. I could go on. Everything must be scrutinized.

So in the future, whenever you look at the financial statements of a privately-held firm in this or any other business, you really need to look into each of these issues and more to be sure you are getting a proper picture of the business's financial performance and condition. ▀

MARK ZWEIG is Zweig Group's chairman and founder. Contact him at mzweig@zweiggroup.com.



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2020 Seminar Calendar

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MARCH

12-13 The Principals Academy
Dallas, Texas

APRIL

2-3 CEO Roundtable Retreat
Atlanta, Georgia

15-16 Elevating Doer-Sellers:
Intensive 2 Day Workshop
San Francisco, California

MAY

19 Project Management for AEC
Professionals
Tampa, Florida

27 Learn The Language of
Business: Financial
Management
Dallas, Texas

JUNE

11-12 The Principals Academy
Washington, D.C.

17-18 Leadership Skills for AEC
Professionals
Seattle, Washington

24 Elevate Your Recruiting &
Retention Strategy
Denver, Colorado

JULY

14 Learn The Language of
Business: Financial
Management
Chicago, Illinois

23-24 The Principals Academy
Portland, Oregon

AUGUST

5-6 Elevating Doer-Sellers:
Intensive 2 Day Workshop
Chicago, Illinois

12 Project Management for AEC
Professionals
Dallas, Texas

20 Elevate Your Recruiting &
Retention Strategy
Orlando, Florida

SEPTEMBER

30 ElevateHer Symposium
Denver, Colorado

30-2 Elevate AEC Conference
& Awards Gala
Denver, Colorado

OCTOBER

14 Project Management for AEC
Professionals
Minneapolis, Minnesota

22 Elevate Your Recruiting &
Retention Strategy
Los Angeles, California

NOVEMBER

5-6 The Principals Academy
Phoenix, Arizona

12-13 CEO Roundtable Retreat
Napa, California

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PROFILE



Support: Paul Greenhagen

President and CEO of Westwood (Minneapolis, MN), a firm that's been focused on enhancing communities with smart engineering for almost 50 years.

By LIISA ANDREASSEN
Correspondent

Greenhagen focuses on corporate development, strategic alignment, risk management, and sustainable and scalable growth. His strong leadership style emphasizes a culture of integrity – one that enables staff to achieve success through client satisfaction and personal and professional growth.

“Through my experience doing acquisitions and entering new markets, I’ve learned that culture is more important than numbers,” Greenhagen says. “In the beginning, we looked more at the numbers than the people and their cultural fit. It caused more damage than any monetary gains an acquisition could bring. A strong culture and good leadership has proven to be our biggest differentiator and brings us greatest success.”

A CONVERSATION WITH PAUL GREENHAGEN.

The Zweig Letter: What are the three to four key business performance indicators that you watch most carefully? Do you share that information with your staff?

Paul Greenhagen: Revenue, profit, backlog, and utilization. We share these details in a “State of Business” summary at our monthly town halls. Our employees appreciate the transparency. Having an understanding of this information along with business trends, helps them understand how their hard work and contribution is so important to achieving our goals.

TZL: Artificial intelligence and machine learning are potential disruptors across all industries. Is your firm exploring how to incorporate these technologies into providing improved services for clients?

PG: Yes. We have a dedicated staff member who focuses on innovation and new technologies to improve our performance and client satisfaction. Innovation is deeply embedded into Westwood’s culture and we recognize the potential for technologies such as artificial intelligence and machine learning to transform our industry. We continually invest in our vision and strategy to provide a basis for integrating new technologies. Our teams are in early discussions on implementing AI into our business

operations and we're starting to use machine learning to do drone-based inspections of facilities. We're also collaborating with software experts to use AI/machine learning to analyze thousands of images to determine faults and failures on specific projects.

TZL: What, if anything, are you doing to protect your firm from a potential economic slowdown in the future?

PG: Like most firms, we learned a lot from the past recession. Focusing on diversification helps stabilize our business when the markets fluctuate. We concentrate on balancing our revenue streams across our markets, services, and geographic locations. We hold quarterly, all-day business update sessions with our leadership team to stay on top of changing markets and our business activities as a whole. Every year, we update our three-year strategic plan to account for economic changes as well.

“Westwood has become diverse by welcoming and supporting talent from different backgrounds. The success of these employees has driven our PMs to demand more diverse talent.”

TZL: Are you using the R&D tax credit? If so, how is it working for your firm? If not, why not?

PG: We've received R&D tax credits annually since 2014 and it's working extremely well. These credits lower our effective tax rate, which frees up cash to run the business. They're complicated to calculate, but simple in concept. It's also inspired new innovations on projects and within our industries.

TZL: It is often said that people leave managers, not companies. What are you doing to ensure that your line leadership are great people managers?

PG: Westwood invests in training and leadership development with a focus on core values and culture. Culture is a priority for us and a top focus in our strategic plan. We have a mentoring program and offer leadership training (in- and out-of-house).

TZL: What novel approaches are you bringing to recruitment, and how

are your brand and differentiators performing in the talent wars?

PG: We had more than 40 interns this year. More than 70 percent of them became full-time employees. We're also growing our co-op program, which means we have students in our organization year round. This pushes our diversity, inclusion, and technology advancement efforts. We know that people like to be a part of something successful, so we focus on achieving awards that recognize us as a top firm, best place to work, and leader in marketing excellence. Our strategic plan guides how we approach our business, recruiting, and brand. The requirements of the awards we pursue help us to set goals and measure success. Top talent is in high demand, so we're more likely to attract their attention as a leading industry firm that offers unique opportunities.

We also use feedback from employee surveys to find new ways to enhance our workplace. We differentiate by zeroing in on our long-term strategies and using a wide variety of communication channels to reach the people who fit on our team. All of these efforts, as well as the programs we have for career development help us to attract new talent and companies for acquisition.

TZL: Does your firm work closely with any higher education institutions to gain access to the latest technology, experience, and innovation and/or recruiting to find qualified resources?

PG: We provide scholarships to many institutions that support our professions. We're also actively working with 15-20 colleges and technical schools around the country to attract interns and future staff. We focus on those schools that are in the communities we serve and those that support our profession. Our activities with these schools extend to career fairs, internships, co-op opportunities, classroom presentations, project support, club sponsorship, club participation, alumni support, and instructors. A number of our employees are part-time instructors at partner institutions.

TZL: When you identify a part of your business that is not pulling its weight in terms of profitability or alignment with the firm's mission, what steps do you take, and what's the timeline, to address the issue while minimizing impacts to the rest of the company?

See SUPPORT, page 8



HEADQUARTERS: Minneapolis, MN

NUMBER OF EMPLOYEES: 650

YEAR FOUNDED: 1972

NUMBER OF OFFICE LOCATIONS: 12

MARKETS:

- **Land:** Public infrastructure and private development
- **Power markets:** Wind energy, solar energy, energy storage, and power delivery

SERVICES:

- **Land:** Civil engineering, land surveying, water resources, water/wastewater, transportation, planning and landscape architecture, environmental, and construction management
- **Power:** Land surveying, civil engineering, electrical engineering, geotechnical and structural engineering, water resources, field services, environmental, aerial mapping, and LiDAR

SUPPORT, from page 7

PG: First, we determine why it's not pulling its weight or why it doesn't align with our mission. Then we identify what success would look like. The timeline depends on the situation. In general, we create a plan which could include any mix of focused leadership guidance, strategic hires, acquisitions, etc. and then set a realistic timeframe with milestones to measure our progress.

TZL: How do you handle a long-term principal who is resting on his or her laurels? What effect does a low-performing, entitled principal or department head have on firm morale?

PG: We confront them directly and determine what steps are needed for change. A low-functioning principal can have a very negative effect on the company, and we deal with it as soon as possible.

TZL: How often do you value your firm and what key metrics do you use in the process? Do you value using in-house staff or is it outsourced?

PG: We do it annually and we outsource it.

TZL: Ownership transition can be tricky, to say the least. What's the key to ensuring a smooth passing of the baton? What's the biggest pitfall to avoid?

PG: Ownership and leadership transition are very different for us. At Westwood, our buy-sell agreement requires that we sell our shares at 65, which allows us to manage the process. We create scenarios for retiring owners which allows us to plan years in advance. Westwood has been in business for 47 years and has successfully transitioned ownership multiple times. Shareholders are required to give a one-year notice, which also allows us to plan ahead. Westwood has worked to keep balance in share ownership as we've grown. The biggest pitfall to avoid is not planning. Look forward and be prepared.

“Westwood has been in business for 47 years and has successfully transitioned ownership multiple times. Shareholders are required to give a one-year notice, which also allows us to plan ahead. Westwood has worked to keep balance in share ownership as we've grown. The biggest pitfall to avoid is not planning.”

TZL: They say failure is a great teacher. What's the biggest lesson you've had to learn the hard way?

PG: Through my experience doing acquisitions and entering new markets, I've learned that culture is more important than numbers. In the beginning, we looked more at the numbers than the people and their cultural fit. It caused more damage than any monetary gains an acquisition could bring. A strong culture and good leadership has proven to be our biggest differentiator and brings us greatest success.



Westwood's shareholders enjoying time together.

TZL: Research shows that PMs are overworked, understaffed, and that many firms do not have formal training programs for PMs. What is your firm doing to support its PMs?

PG: We outsource some of our PM training, but we also have internal training through Westwood University on our processes and methods. Our senior leaders are actively involved with mentoring PMs. They have an open door policy and place high priority on PMs to ensure they have what they need. Mentoring ranked high in feedback that we received from employees regarding how they would define our culture.

TZL: In one word or phrase, what do you describe as your number one job responsibility as CEO?

PG: Increase shareholder value – that's sort of strange to say out loud, but it's a fact (or should be) for every CEO. Increasing shareholder value isn't just a win for shareholders, it's a win for clients and employees.

TZL: Diversity and inclusion is lacking. What steps are you taking to address the issue?

PG: Westwood has become diverse by welcoming and supporting talent from different backgrounds. The success of these employees has driven our PMs to demand more diverse talent. As a result, we've developed more programs geared toward reaching and supporting them than we did five years ago.

TZL: A firm's longevity is valuable. What are you doing to encourage your staff to stick around?

PG: Recruiting and retention are everyone's job. This is the message that we try to support every day. Our success as an organization is dependent on our success with our clients. Every project manager understands this. We have a lot of programs – from an active wellness program (that we call Lifestyle) to a company-wide Toastmasters group – but recruiting and retention cannot be “outsourced” to a program. Every supervisor understands that their success is dependent on their talented, trained team, and that they need to support that team in every way possible. ▀



What's in a question?

Asking questions is a critical skill if you want to understand and anticipate your clients' needs.



Kate
Allen

One of our company's core values is "We are Partners." Our lasting relationships with clients and communities deliver success and value. We care about our client's business. We are beyond helpful – anticipating our client's needs. We are good stewards of our client's resources. We participate in the community by giving our time, talents, and resources. We value diversity and we take care of our people, and our clients take care of us.

How do we learn about our client's business, enough to care? How do we anticipate our client's needs? How do we know what our client's resources are? How can we best give back to the community, in a meaningful way? How can we take the best care of our people?

Success in any of these efforts relies on the art and skill of asking questions. One method of questioning is called Socratic questioning – a disciplined method of questioning that is thoughtful, logical, strategic, and intentional. Socratic questioning is used to learn, to teach, to explore, to understand, to validate ideas, to connect, to uncover assumptions, to convince, to overcome inaccuracies, to gain confidence, to

"Becoming a partner requires more than technical or design ability, it requires digging deeper to better understand and serve your clients, your teams, and your communities."

demonstrate confidence, to create relationships, to anticipate, to know more, to challenge what we know, etc. The power to become "partners" with our clients, our people, and our community – all starts with learning to ask the obvious questions

See KATE ALLEN, page 10



ON THE MOVE

FINLEY BRIDGE DESIGNERS, JAN ZITNY AND JIRI BURES OBTAIN LICENSES AND ARE PROMOTED TO BRIDGE ENGINEERS FINLEY Engineering Group, Tallahassee-based bridge design and construction engineering firm, is pleased to announce that Jan Zitny has passed his Professional Engineering exam and is a licensed Engineer in the State of Texas, and Jiri Bures has passed his Chartered Engineering exam in the Czech Republic. FINLEY recognized these significant accomplishments by promoting both Zitny and Bures to Bridge Engineers.

Zitny has been a member of FINLEY’s team in Prague, Czech Republic, since May of 2016, and came to the Tallahassee office in 2019 as part of FINLEY’s Technology Transfer program. Zitny has continued his studies on wind load effects researched for his Ph.D. at Czech Technical University while working on FINLEY’s projects. For FINLEY’s Tallahassee office, this program serves as a unique opportunity for its staff to integrate technologies and practices with its Prague office. Zitny has contributed to the majority of FINLEY’s ongoing projects during this time, bolstering projects with innovative modeling, including FINLEY’S recent projects I-395 Signature in Miami, Florida, and the Wekiva Parkway Section 6 Design-Build in Lake and Seminole Counties, Florida.

Bures has a bachelor’s and a master’s degree in civil engineering from Czech Technical University and five years’ experience as a designer and architectural engineer. His experience as a steel structures designer includes steel design, analysis, detailing, and

fabrication of steel structures for the building markets. During his work at FINLEY, Bures’ has worked on the design, calculations, and drawings on notable projects including the award-winning Troja Bridge in Prague and the Pardubice Airport Terminal, as well as the Road 70 and Bridge 303 over Road 6 projects in Israel.

FINLEY is recognized nationally and internationally as a leading design and construction engineering consulting firm specializing in complex bridge projects of all kinds. FINLEY’s expertise includes concrete segmental, steel box, arches, and trusses, and long span cable-stayed bridges. FINLEY focuses on large contractor-driven projects, such as design-build, D/B/F/O/M, public-private partnership and value engineering/alternative design.

DAVIS, BOWEN & FRIEDEL, INC. WELCOMES NEW EMPLOYEES TO THE TEAM Davis, Bowen & Friedel Inc., one of the area’s leading professional architectural, engineering, planning, and surveying firms, announced three new staff members to their growing offices in Salisbury & Easton, Maryland; and Milford, Delaware.

Brenda Ramage, with more than 26 years of office experience, has joined the firm as an administrative assistant. Ramage is responsible for providing administrative support to the Easton office and her responsibilities will include directing calls to assist clients, supporting daily office operations, and maintaining internal filing systems within the office.

“Brenda’s extensive experience within the office environment is beneficial, but it’s her eagerness to assist others on project related tasks that make her an invaluable asset to the team,” said Principal Jason Loar, P.E.

Joining the DBF team in the Milford office is CAD technician Kyle Hains, who will be assisting the civil engineering department. Hains, a graduate from Delaware Technical and Community College, has an associate degree in architecture engineering, computer aided drafting, and construction management. Hains is currently involved in a wide range of residential and commercial projects, which include the Millsboro Professional Center, Carillion Square Apartments, and Vineyards Apartments in Sussex, County Delaware.

Katelyn Nagler recently joined the firm as a marketing assistant. She is a graduate from Salisbury University with a bachelor’s degree in marketing. Previously, Nagler worked for a local non-profit organization assisting with the implementation of marketing and social media campaigns in addition to fundraising efforts. Nagler will be assisting the marketing department from the Salisbury office in social media efforts, proposal research and coordination, and branding initiatives as the firm continues to grow.

Davis, Bowen & Friedel, Inc. is a full-service architectural, engineering, planning, and surveying firm with offices in Salisbury and Easton, Maryland, and in Milford, Delaware.

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but then learning to probe deeper, using a method such as Socratic questioning.

A simple example to share: A co-worker stopped by an open house with his wife one Sunday afternoon. Immediately when the real estate broker approached them, he began to show them around and pointed out all the key features of the home, the remodeled bathrooms, the open floor plan, the backyard, and many more features that the broker thought made the home an attractive buy. Afterward, he and his wife left to continue with their afternoon.

The one question the broker never asked, from the time these potential clients walked in the door until the time they left, was, “What are you looking for in a home?” That one simple question was missing, and they left without further interest in the home.

How often do we meet with a client, new or existing, and forget to ask the basic as well as the deeper questions to fully understand their needs? Every project starts as a business need (always!) so how often do you know what that business need is? How often do you fully understand

who the stakeholders are and “what keeps them up at night?” How often do you mentor others by asking them questions (versus giving the quick reply)? How often do you ask interesting questions of your co-workers, with the intention to connect? How many new and interesting things have you learned about one of your long-time co-workers in the past six months?

“How do we learn about our client’s business, enough to care? How do we anticipate our client’s needs? How do we know what our client’s resources are? ... Success in any of these efforts relies on the art and skill of asking questions.”

Questioning, and Socratic questioning specifically, is a critical skill we encourage each of you to develop. Becoming a partner requires more than technical or design ability, it requires digging deeper to better understand and serve your clients, your teams, and your communities. ▀

KATE ALLEN is principal-in-charge at BSA LifeStructures. Contact her at kallen@bsalifestructures.com.



How to say no

Leading a successful organization takes the courage to try new ideas, weather many storms, and know how to say no.



**Julie
Benezet**

Something in the water? In rapid succession, three company leaders told me they had reached their outer limit of frustration and wanted to quit. While they came from different organizations, they had several things in common. They were experts in their respective fields, hardworking, and dedicated to company success.

They also faced three intractable problems concerning the leadership transition of their senior colleagues:

- 1) Staunch resistance to yielding client control.**
Their colleagues clung onto client control, refusing to pass it to the next generation who had assumed the bulk of the work, including relationship tending.
- 2) No mechanism to confront resistance.** None of the companies had instituted a governance structure that would impose repercussions for not relinquishing control. Their boards of directors included no outside board members which, in addition to conflict avoidant cultures, allowed them to sidestep difficult conversations about the future.
- 3) Disinterest in installing the next generation of leaders.** While the companies had identified emerging leaders, the senior colleagues showed

no interest in committing to a specific transition timeline.

All three companies were experiencing the consequence of not solving these issues – threatened loss of key talent and their future. The question is how to fix the problem.

“The leader’s job is to determine which lines to draw for the welfare of the company and to say no when the lines are crossed.”

THE POWER OF “NO.” The leadership transition issues described above have rational solutions. Orderly

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**CEO ROUNDTABLE RETREAT:
APRIL 2-3, 2020 | ATLANTA, GA**

The CEO Roundtable Retreat is a unique opportunity for AEC firm leaders to engage and interact with industry peers to discuss current issues facing firms today, explore industry trends and next practices, and confront the biggest challenges they face leading their firms.

Zweig Group's CEO Chad Clinehens, P.E., moderates the program guiding group conversations, encouraging integration and networking, and ensuring attendees gain valuable insight, new ideas and tools – and a new network of colleagues – to foster effective leadership at their respective firms.

Come prepared to discuss your biggest challenges and successes during this highly interactive session. With you in control of the subject matter, roundtable discussions strike at the heart of what you need to effect change in your organization.

Past attendees of CEO Roundtable events state “there is no better forum for dialogue than with peers experiencing the same issues I am” and “the statistics provided by Zweig Group through their continual research of firms and firm leaders gives me the exact benchmarking data I need to justify change and action in my firm.”

In addition to the private dinner and guided discussions, attendees are invited to participate in a Porsche Driving Experience at the Porsche Experience Center Atlanta.

To register or learn more visit bit.ly/CEOTZL or call 800.466.6275.

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succession plans, cultural transformation, and specific decision-making agreements can be designed, along with appropriate compensation adjustments. However, without someone willing to assume the responsibility for negotiating and enforcing change, any such planning becomes moot.

Too often company leaders duck the responsibility because it involves tough conversations. Consultants can surface useful information and provide insights to unblock resistance to leadership transition. However, their impact only lasts as long as they do. Unless company leaders can keep former dissenters aligned with the new order, the company will revert to its former problems.

To solve the problem, companies must train leaders on how to say no.

No doubt, saying no is challenging. As any parent will tell you, to persuade and then establish sticking power, “no” has to mean something. You need to know what principles you want to advance and the lines in the sand you will draw to enforce them. As a parent, you want to protect your children’s health and safety. As a company leader, you want to promote smart and sustainable business growth.

“Leading a successful organization takes courage to try new ideas, weather many storms, and know how to say ‘no.’ As hard as this last one is, in the end, everyone will benefit.”

The leader’s job is to determine which lines to draw for the welfare of the company and to say no when the lines are crossed.

For example, in the case of leadership transition, the leader must make the case for its importance, then draw a line in the sand and enforce it. Failure to do so will impair business growth as top talent leaves.

FIVE POINTERS FOR SAYING NO. Here are five pointers to help leaders say no:

- 1) **Keep your eye on the prize.** Remember you are there to build a successful future for your company.
- 2) **Don’t make it personal.** Your goal is to protect the enterprise. That means reinforcing the broader business frame. If a practice group leader will not commit to a

viable client transition plan, the leader might say, “No, we cannot live without a plan. We risk losing our next generation of leaders who stand ready to move up. Further, our clients are undergoing their own leadership transitions and their successors are our emerging leaders’ peers.”

“No doubt, saying no is challenging. As any parent will tell you, to persuade and then establish sticking power, ‘no’ has to mean something. You need to know what principles you want to advance and the lines in the sand you will draw to enforce them.”

3) Be prepared to deal with anger, acting out, and unexpected behavior. Many people fear change and will do their utmost to fight it. Stay firm, respectful, and breathe deeply as you seek to understand root causes of resistance.

4) Be willing to impose consequences. Know what the company can and will do if no agreement can be reached. The company governance documents should provide mechanisms to adjust roles and authority. Seek legal advice for interpretation and negotiating strategy if needed. While sometimes necessary, using a lawyer as your spokesperson should be done judiciously, because it could escalate matters to a level no one wants.

5) Call for reinforcement. Consider adding outside board members. Granting ultimate authority to the board for company strategy, leadership evaluation, and succession will reinforce leadership direction and best practices.

Leading a successful organization takes courage to try new ideas, weather many storms, and know how to say “no.” As hard as this last one is, in the end, everyone will benefit. ▀

JULIE BENEZET spent 25 years in law and business, and for the past 18 years has coached, taught, and consulted with executives from virtually every industry. She earned her stripes for leading in the scariness of the new as Amazon’s first global real estate executive. She is author of the award-winning *The Journey of Not Knowing: How 21st Century Leaders Can Chart a Course Where There Is None*. Her workbook, *The Journal of Not Knowing*, provides a self-guided discovery mission to navigate the adventure of pursuing one’s dreams based on the Journey principles. She can be reached at juliebenezet.com.