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Aligning Tech and Business Strategy

Maximizing Impact and Growth

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Aligning Tech and Business Strategy to Maximize Impact and Growth

Bret Tushaus

11/6/2025

Course Description

As artificial intelligence (AI) reshapes the AE industry, the need for alignment between technology and business strategy has never been greater. The right technology investments can accelerate growth and improve efficiency, while poor alignment can lead to costly inefficiencies. But how do you ensure your firm's technology decisions actively support business goals rather than become distractions? Explore how AE firms can bridge the strategy gap by creating meaningful connections between business objectives and technology investments. Learn how to make informed decisions by evaluating emerging technologies beyond the hype and selecting those that drive real business value. Discover strategies for maximizing ROI through alignment, measuring impact, and optimizing resources to ensure innovation enhances project delivery and competitive advantage. Walk away with actionable insights to help your firm successfully navigate the evolving AI landscape, ensuring that technology and business strategy work together to fuel long-term success.

Learning Objectives

At the end of the this course, participants will be able to:

1. Understand how to align technology and business strategy to ensure that digital investments directly support firm-wide goals and operational priorities.

2. Evaluate emerging AI technologies beyond the hype to identify which innovations deliver measurable value for architecture and engineering firms.

3. Apply practical methods for measuring ROI and impact to optimize technology resources and drive continuous improvement in project delivery and efficiency.

4. Develop an actionable framework for strategic technology adoption that enables your firm to navigate the evolving AI landscape and sustain long-term competitive advantage.

About Me

» Bret Tushaus – VP, Product Management

» 15 years with architecture firm managing technology and operations

» 15+ years with Deltek managing product teams focused on engineering, architecture and construction solutions

» Focused on ways ERP and related technology solutions can solve organizations' operational pain points

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1 The Technology Imperative

2 Misalignment Challenge

3 Strategic Action Framework

4 Self Reflection

Business Pressures and Challenges
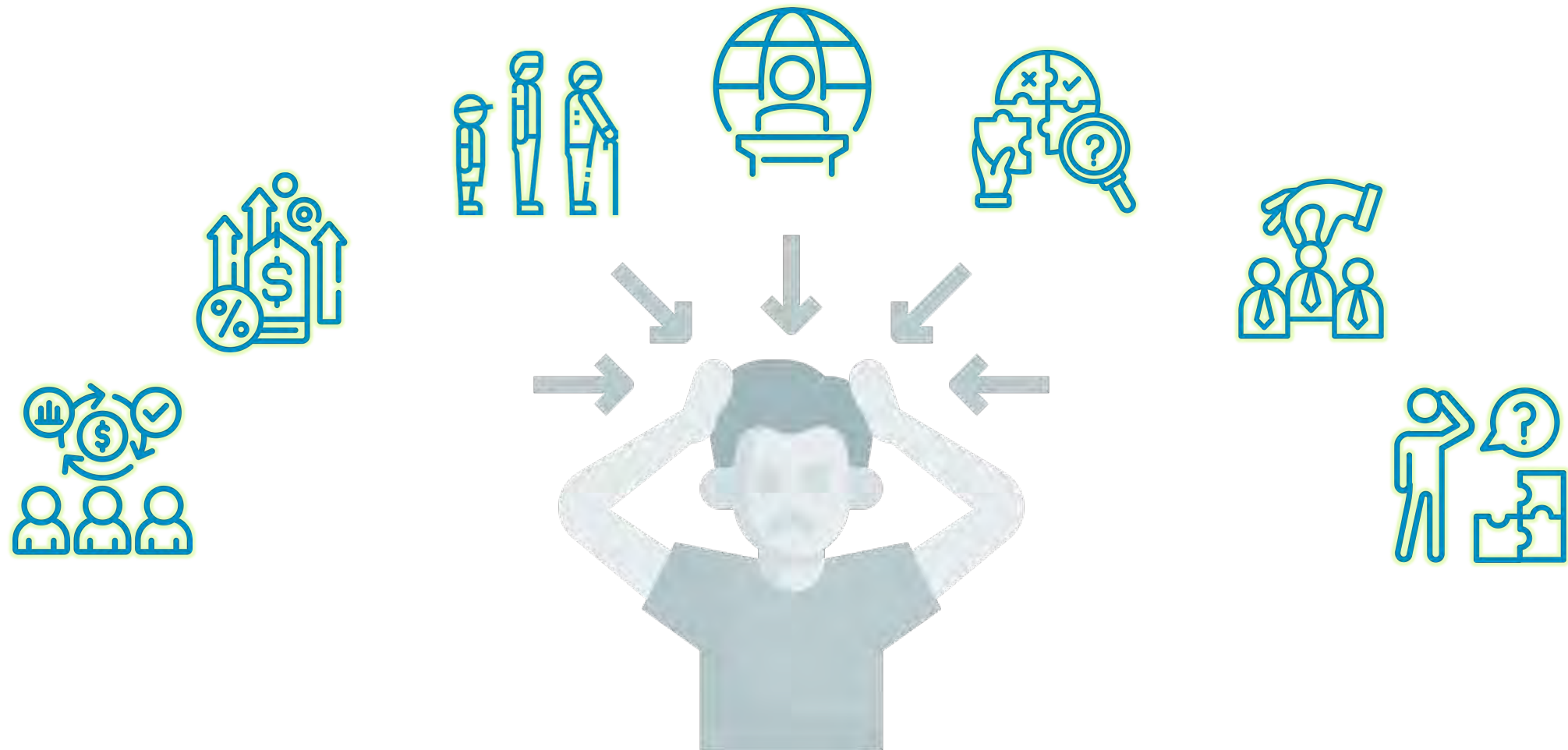
Business Pressures and Challenges

Tariffs

Availability of good candidates

Finding and retaining qualified staff

Socioeconomic disruption

Inflation and interest rates

Increasing project complexity

Political uncertainty

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Ask Yourselves This...

If you were starting your firm today, what would you do differently?"

The Technology Imperative

1 in 3 Firms...

...risk losing market share within 2 years without significant tech progress
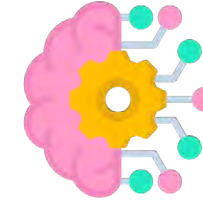
53% of Firms...

...now use AI (jumped from 38% in just one year)

22% of Respondents...

...experienced a cyber security incident

95% of Firms...

...still rely on manual data entry in accounting / finance

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Technology is a business survival imperative.

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Technology creates opportunity to propel your firm forward...

Top IT Operations Challenges

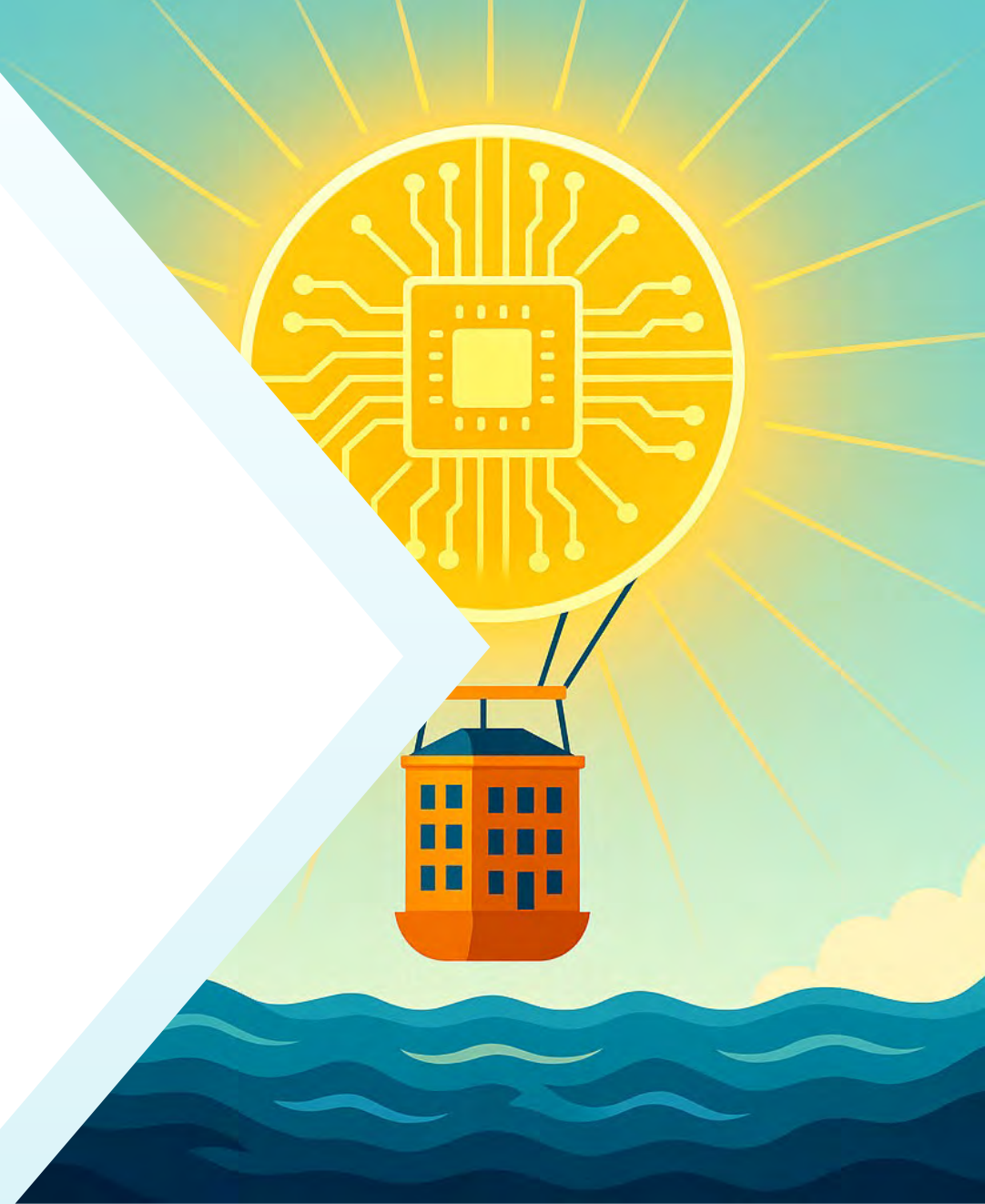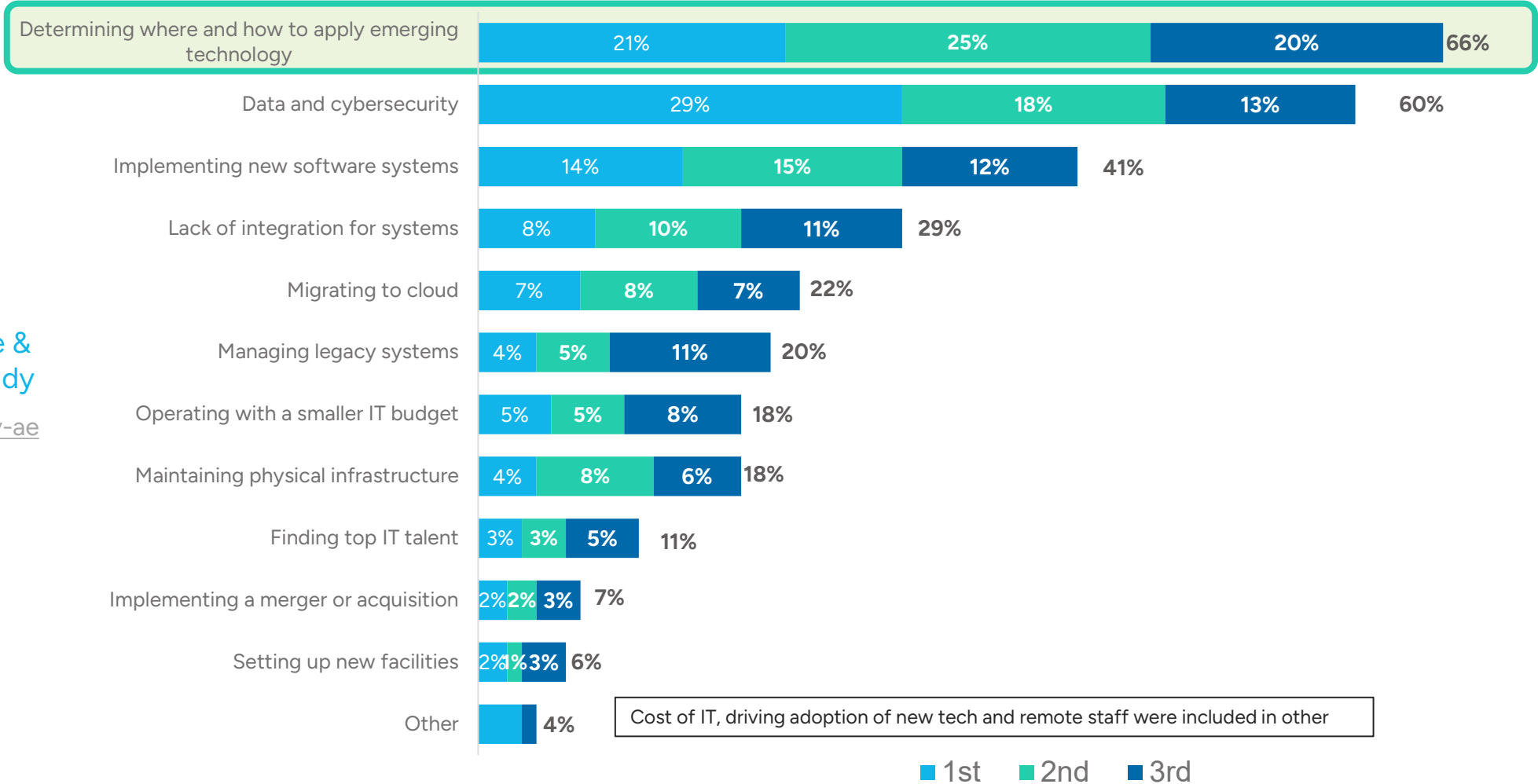*What are the Top 3 Technology-Related Challenges your company's operations face in the next 12 months?*

Deltek CLARITY

46th Annual Architecture & Engineering Industry Study

https://info.deltek.com/clarity-ae

Challenge	1st	2nd	3rd	Total
Determining where and how to apply emerging technology	21%	25%	20%	66%
Data and cybersecurity	29%	18%	13%	60%
Implementing new software systems	14%	15%	12%	41%
Lack of integration for systems	8%	10%	11%	29%
Migrating to cloud	7%	8%	7%	22%
Managing legacy systems	4%	5%	11%	20%
Operating with a smaller IT budget	5%	5%	8%	18%
Maintaining physical infrastructure	4%	8%	6%	18%
Finding top IT talent	3%	3%	5%	11%
Implementing a merger or acquisition	2%	2%	3%	7%
Setting up new facilities	2%	1%	3%	6%
Other				4%

Cost of IT, driving adoption of new tech and remote staff were included in other

■ 1st   ■ 2nd   ■ 3rd

Top Technology Trend Challenges

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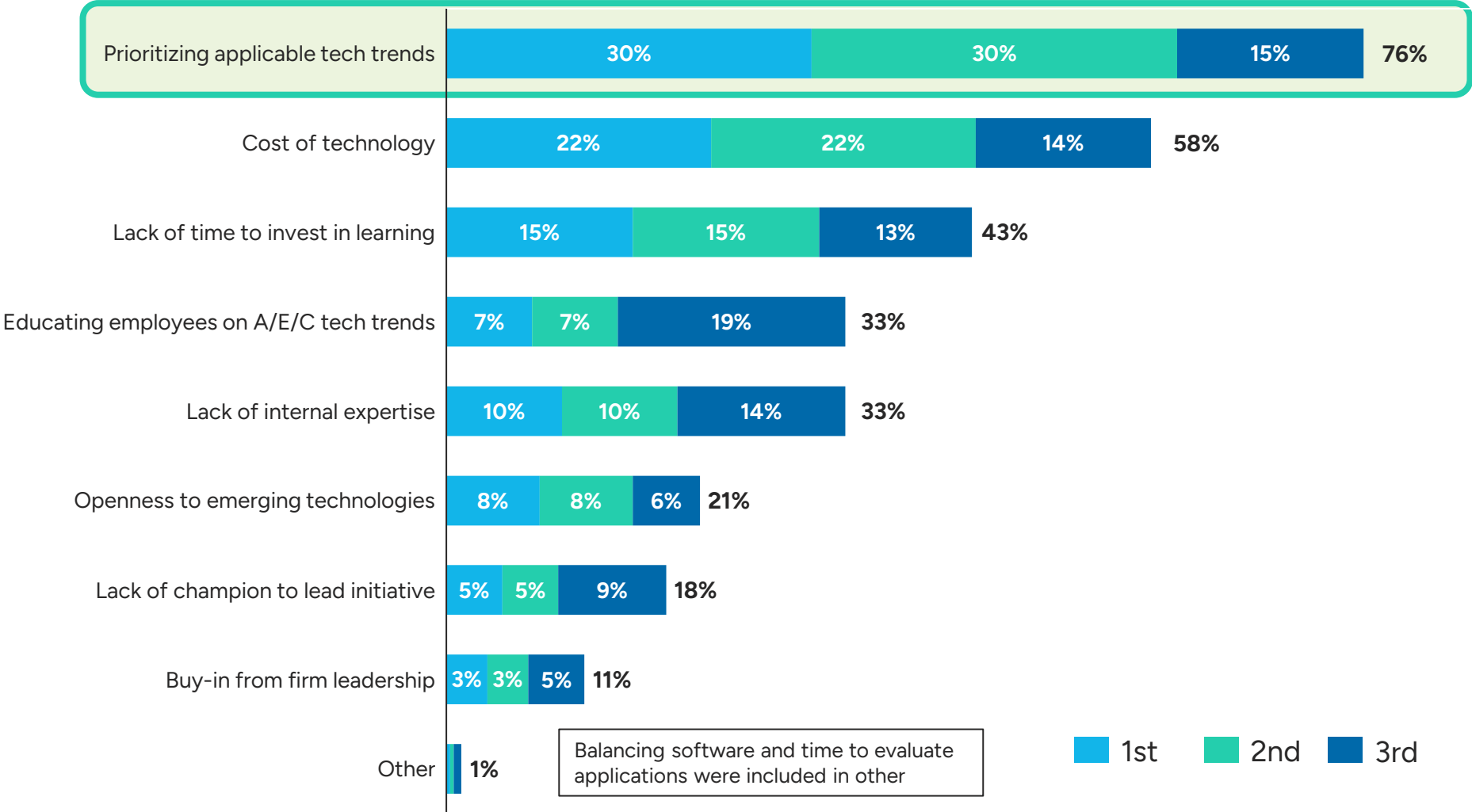
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Challenge	1st	2nd	3rd	Total
Prioritizing applicable tech trends	30%	30%	15%	76%
Cost of technology	22%	22%	14%	58%
Lack of time to invest in learning	15%	15%	13%	43%
Educating employees on A/E/C tech trends	7%	7%	19%	33%
Lack of internal expertise	10%	10%	14%	33%
Openness to emerging technologies	8%	8%	6%	21%
Lack of champion to lead initiative	5%	5%	9%	18%
Buy-in from firm leadership	3%	3%	5%	11%
Other				1%

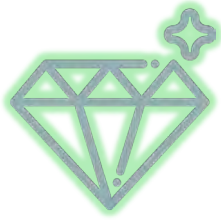Balancing software and time to evaluate applications were included in other

1st 2nd 3rd

The Challenge No One Is Talking About

Misalignment

Many firms, still today, treat technology as an IT issue, not a strategic business issue.

Shiny Object Syndrome

Example: Buying tools because competitors have

Result: Technology spending up, but 95% still rely on manual data entry in accounting/finance

The IT Silo

Example: Technology decisions made by IT without input from operations, PM, or business

Result: Duplicated data entry, no single source of truth, missed opportunities

The Waiting Game

Example: "We'll invest when things are more certain" or "when we have more time"

Result: While waiting, high performing competitors are pulling away

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The Challenge No One Is Talking About

Misalignment

Many firms, still today, treat technology as an IT issue, not a strategic business issue.

» Wasted software licenses

» Lost productivity (opportunity cost)

» Talent leaving for more modern firms

» Inability to compete consistently

The Technology Imperative

- ✓ Non-adopters of AI could see 20% decline in cash flow by 2030 (Harvard Business Review)

- ✓ AI front-runners could potentially double their cash flow (Harvard Business Review)

- ✓ "Expectation of the younger generation to not do stupid work that could be automated. They don't tolerate it. They just leave." (Martin Fischer, Stanford University)

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What Alignment Actually Means

Start with Business Outcomes:

» What are your firm's top 3-5 strategic priorities? (Examples: geographic expansion, new market sectors, improve margins, alternative delivery methods, reduce reliance on key personnel)

» For each priority, ask: "What capability would we need to achieve this?"

» THEN ask: "What technology could enable that capability?"
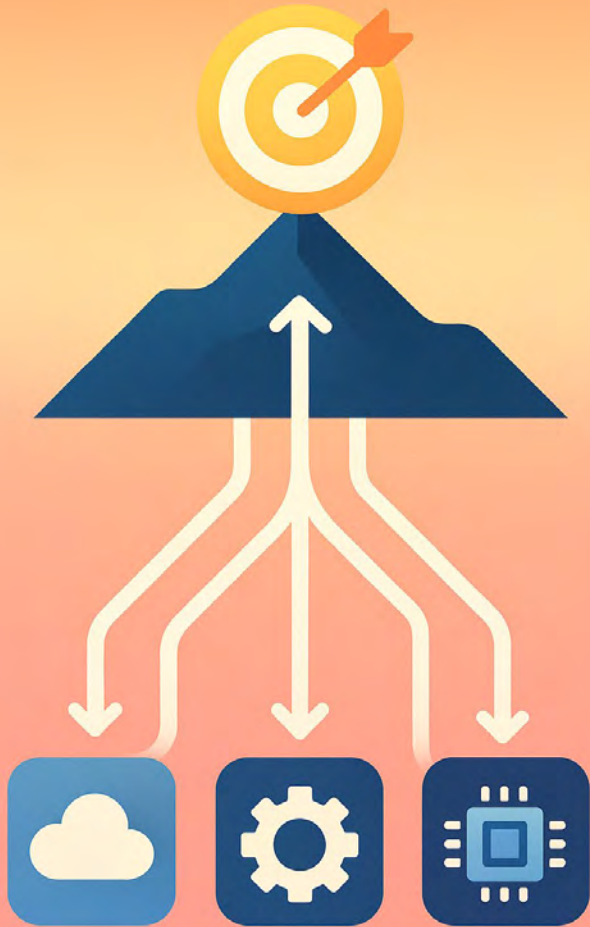
The Alignment Test

What specific business outcome does this enable?

How will we measure success in business terms (not just adoption rates)?

What process / behavioral change is required?

Who is the executive sponsor (must be business side, not IT)?

Can we pilot and prove value before full investment?

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Strategic Action Framework

Strategic Action Framework

Strengthen Cybersecurity Posture

What: Non-negotiable given rising threats

How: Regular audits, updated policies, mandatory staff training

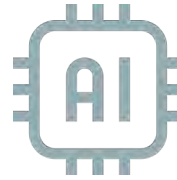**Reality**: Many clients now require specific cybersecurity standards to bid

Modernize Data & Integration

What: Assign data stewards dedicated to operationalizing your data

How: Create single source of truth, invest in integration tools

Impact: Enables better analytics and AI applications

Develop Formal AI Strategy

What: Move beyond experimentation to structured approach

How: Start with repetitive, data-intensive tasks (scheduling, budgeting, RFIs)

Key Stat: 13% already have AI champions—don't let AI "happen to you"

Plan for Next-Gen Tech via Pilots

What: Explore emerging tech through contained experiments

Examples: Digital twins, generative design tools, AI co-pilots

Approach: Small team, small budget, learn by doing

Invest in Staff Skills & Change Management

What: Technology only works with empowered people

Key Stat: 58% already focusing on staff education

How: Ongoing training, internal champions, culture of experimentation

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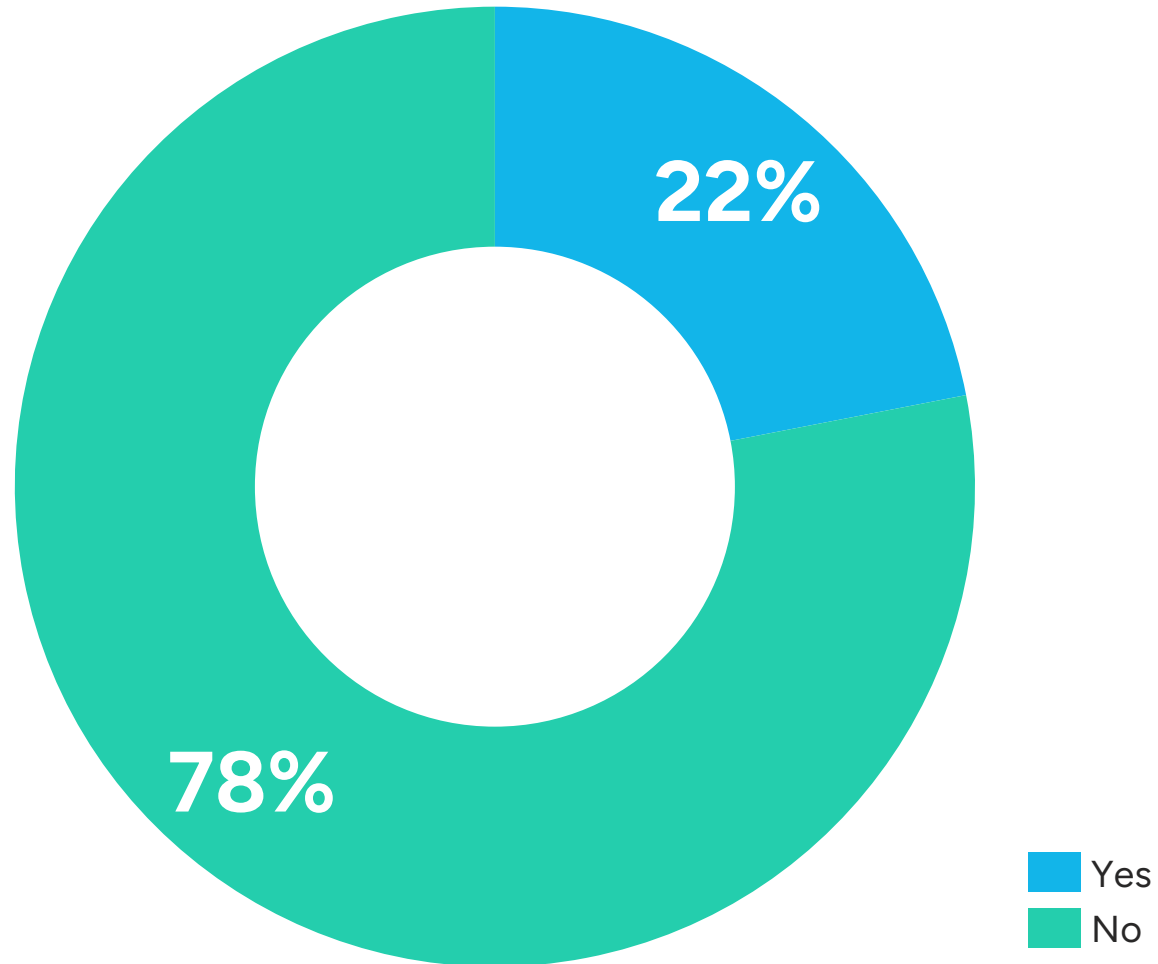
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Cyber Attack or Threat in Last 18 Months

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46th Annual Architecture & Engineering Industry Study

https://info.deltek.com/clarity-ae

22%

78%

■ Yes
■ No

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7 Call to Action Considerations

1. **Prioritize Cybersecurity at the Executive Level**: Make cybersecurity a standing agenda item in board meetings and allocate appropriate resources to security initiatives.

2. **Invest in Employee Training**: Regularly train staff on cybersecurity best practices and emerging threats to build a human firewall against attacks.

3. **Strengthen Incident Response Capabilities**: Develop, test, and refine incident response plans to ensure swift and effective action during security events.

4. **Secure the Supply Chain**: Assess and monitor the security practices of all third-party vendors and partners to mitigate supply chain risks.

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7 Call to Action Considerations

5. **Adopt and Align with Recognized Frameworks**: Implement frameworks like NIST or ISO/IEC 27001 to establish a structured approach to cybersecurity.

6. **Regularly Review and Update Security Measures**: Continuously assess and enhance security controls to adapt to evolving threats and technologies.

7. **Engage in Industry Collaboration**: Participate in industry groups and information-sharing initiatives to stay informed about threats and best practices.

Bonus CTA: Do not be lulled into complacency with the thinking "this will never happen to *my* firm."

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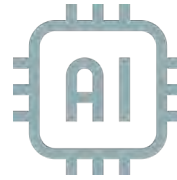
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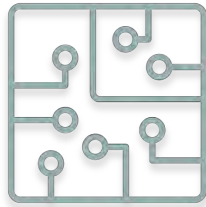
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Why AI?

PRACTICALITY

Highly Accessible

Embedded in Mainstream Tools

Highly Applicable

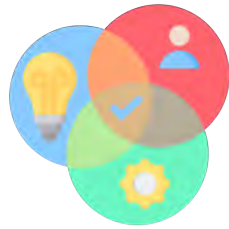## INDIRECT BENEFITS

Job Satisfaction

Market Expectations

Democratization
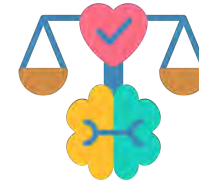
Your AI Moment is Now

We don't know where to start

We don't have the infrastructure or the skills

We're worried about governance or ethics

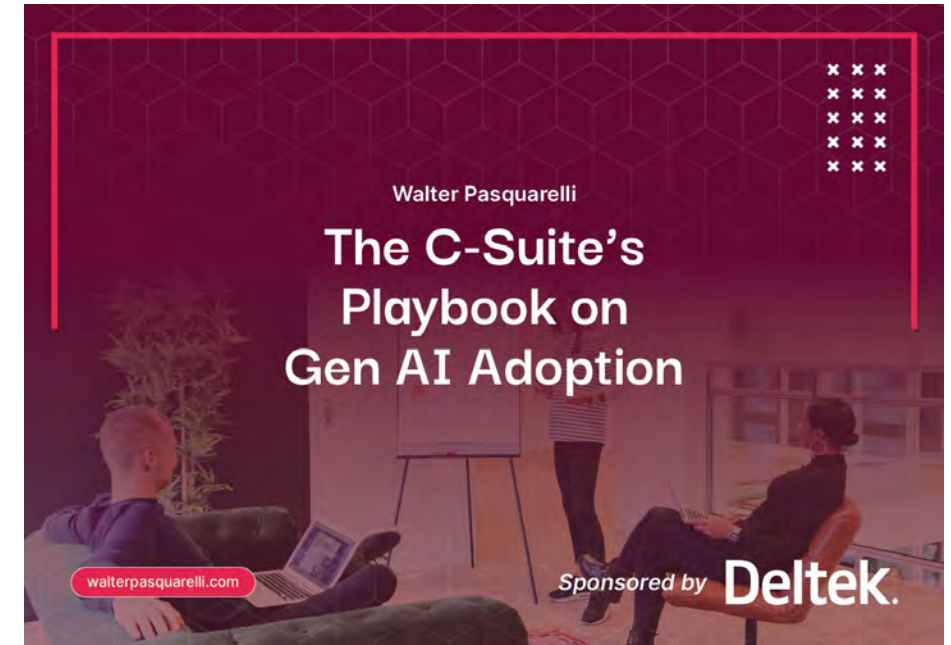We aren't sure what success even looks like

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You don't need to master AI to benefit from it. You just need to start.
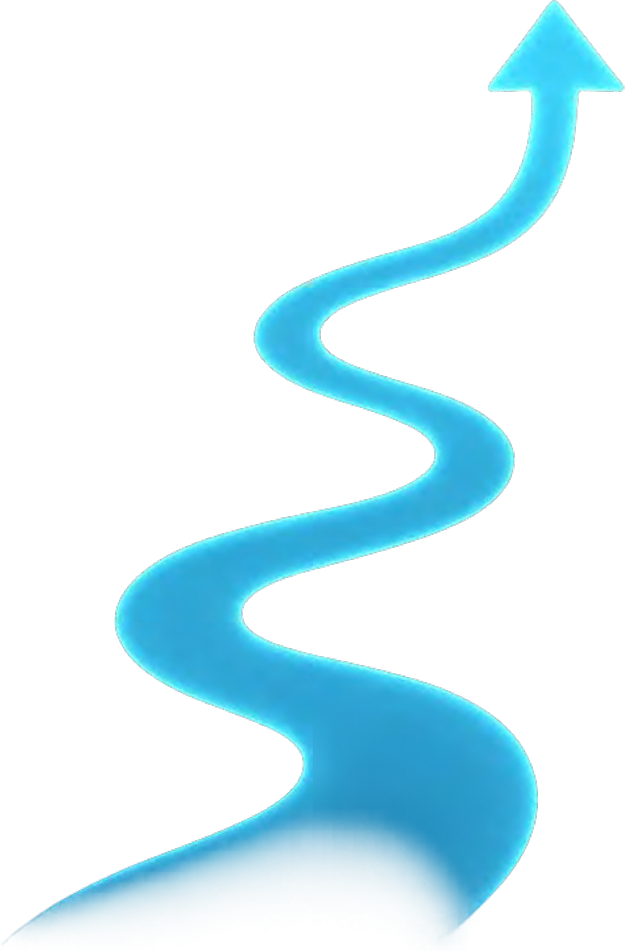
Structuring AI for Real Results

» **What is it?**
  » A strategic guide and self-assessment tool that helps C-Suite leaders align AI with their business goals.

» **Who Authored It?**
  » Walter Pasquarelli, tech and AI expert and evangelist.

» **How does it work?**
  » The playbook breaks down AI adoption into five critical pillars.

» **Includes a Self-Assessment Tool**
  » The playbook provides a structured self-assessment, allowing leaders to pinpoint gaps, prioritize areas for improvement, and build a roadmap for AI-driven transformation.

Walter Pasquarelli

The C-Suite's Playbook on Gen AI Adoption

walterpasquarelli.com

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Structuring AI for Real Results

» **Start with Purpose:** Align AI initiatives to real business challenges, not just shiny tools.

» **Focus on Foundations:** Strategy, data, governance, and culture matter more than any single technology.

» **Prioritize Pragmatic Wins:** Target use cases that create immediate value and build momentum.

» **Think Long-Term:** AI is a journey, not a project, lay the groundwork for continuous evolution.

» **Empower People:** Technology succeeds when your teams are ready, curious, and supported.

Pillar: Strategy & Scope

Firms that adopt AI without aligning it to strategy often waste time and miss real value. This pillar is about identifying what matters most and linking AI to business goals.

Key Principles and Considerations:

» **Align to Business Goals** — Every AI initiative should tie directly to a strategic objective (efficiency, growth, innovation).

» **Prioritize Practical Use Cases** — Start where AI can deliver quick, meaningful wins (e.g., automate reports, improve forecasting).

» **Define Scope Clearly** — Avoid trying to overhaul everything at once—pilot specific projects.

» **Champion Outcome Over Technology** — Focus on the problem to solve, not the tool to use.

» **Accept Iteration** — Strategy will evolve; be ready to learn and adjust based on early results.

Call to Action

✓ Identify 1-2 internal challenges (e.g., proposal generation).

✓ Start with "internal-first" use cases before expanding to client-facing.

✓ Have a 30-minute leadership brainstorm to list all recurring headaches in operations—circle one and find an AI tool to test.

Call to Action

- ✓ Assign someone to catalog relevant data sources currently in use throughout firm.

- ✓ Audit your tools—what AI is already built in (e.g., MS Copilot, Deltek AI features).

- ✓ Partner with a vendor for cloud, storage, or data prep needs.

Pillar: Infrastructure & Integration

AI is only as good as your data and systems. Many firms overlook data cleanliness and workforce readiness.

Key Principles and Considerations:

» **Audit Existing Capabilities First** — Find out what AI capabilities already exist within your current tech stack.

» **Ensure Data Accessibility and Quality** — AI is only as good as the data it draws from; start cleaning and structuring data now.

» **Think Modular and Scalable** — Choose solutions that can grow as your firm's AI needs mature.

» **Leverage Cloud & Open APIs** — Flexibility is key; cloud platforms and APIs enable faster integration.

» **Partner, Don't Build from Scratch** — Small and mid-sized firms should prioritize plug-and-play tools, not massive custom builds.

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Pillar: Compliance & Governance

Trust is foundational. If your team or clients don't trust your AI practices, adoption will stall—or worse, create risk.

Key Principles and Considerations:

» **Create Accountability Roles** — Designate a responsible person or team for AI governance oversight.

» **Emphasize Human Review** — No AI output should go client-facing without human validation.

» **Monitor for Bias and Risk** — Regularly audit AI outputs for fairness, legality, and brand alignment.

» **Plan for Evolving Regulations** — Stay agile—laws around AI are still forming and your policies will need to adapt.

Call to Action

✓ Ask the question – "Have we defined responsible use of AI and made it clear to the team?"

✓ Create a simple "AI Use Policy" (what's OK, what's not).

✓ Assign an "AI steward" for compliance tracking.

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Call to Action

✓ Choose one pilot AI use case (e.g., automated meeting notes) and track time saved each week.

✓ Recommend quarterly reviews of AI experiments

Pillar: Monitoring & Evaluation

Without KPIs, AI tools become gimmicks. Measuring value ensures continuous improvement and buy-in.

Key Principles and Considerations:

» **Set Clear Success Metrics Early** —— Examples: time saved, errors reduced, client response time improved.

» **Track Both Quantitative and Qualitative Value** —— Productivity is measurable, but team morale and client trust matter too.

» **Pilot, Measure, Scale** —— Start small, prove value, expand.

» **Commit to Ongoing Learning** —— AI models and tools improve; your evaluation framework must evolve with them.

» **Celebrate and Publicize Wins Internally** —— Build positive momentum by sharing success stories.

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Pillar: Culture

Culture either accelerates or blocks AI adoption. Your team needs permission to experiment, fail, and learn.

Key Principles and Considerations:

» **Normalize Experimentation** —— Create a safe space to try, fail, and learn.

» **Upskill Everyone, Not Just Tech Staff** —— AI literacy should be baseline knowledge across all roles.

» **Lead by Example** —— Leadership should be visibly curious and willing to use AI tools.

» **Recognize and Reward Early Adopters** —— Celebrate team members who experiment with and champion AI initiatives.

» **Frame AI as an Empowerment Tool** —— Continuously message that AI enhances—not replaces—human creativity and judgment.

Call to Action

✓ Host AI Exploration Days or "Prompt Jams".

✓ Create internal champions or an AI working group.

✓ Ask each team to try one AI tool this month and share learnings in a 10-minute "AI moment" at the next staff meeting.

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How Does the Assessment Work?

» This assessment is designed to help organizations evaluate their readiness for adopting Gen AI.

» It asks 20 targeted questions

» Each question offers five possible responses, representing different stages of readiness.

» Each response is assigned a score from 0 to 4, reflecting the organization's level of progress.

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How: Regular audits, updated policies, mandatory staff training

Reality: Many clients now require specific cybersecurity standards to bid

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Change Management in Action

» **Change is ongoing, not a phase**: plan for adoption, not just implementation

» **Experiment, then scale**: Encourage small-scale innovation (e.g., 90-day pilots) before broad rollouts

» **Create safe space to fail and learn**: Normalize learning curves and celebrate progress

» **Internal storytelling matters**: Share wins internally — "This team automated X and saved 20 hours/month"

» **Include managers in the process**: They set tone and expectations—equip them to lead by example

"CULTURE EATS STRATEGY FOR BREAKFAST"

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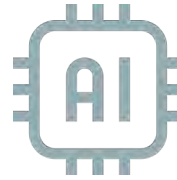**Reality**: Many clients now require specific cybersecurity standards to bid

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Self Reflection

» **What's your firm's AI game plan?**

» How vulnerable are your current processes to disruption?

» Are you turning your data into decisions?

» Where will you be in 3 years if you continue on the current tech trajectory?

» Who is responsible for innovation in your firm?

» What if you do nothing?

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» **What if you do nothing?**

Technology creates opportunity to propel your firm forward...

...now more than ever.

Thank You

brettushaus@deltek.com

This concludes The American Institute of Architects
Continuing Education Systems Course

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Bret Tushaus, Deltek
brettushaus@deltek.com