ROG+ Partners

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Spend It Right: Data Is Today's Currency — Time Is Tomorrow's

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Course Description

Architecture and engineering firms hold years of project and financial data, yet leaders still wait days for answers and spot margin problems too late. This session treats data as a firm asset with its own balance sheet: data you can spend and data debt that charges interest in lost time. Participants will learn to tell AI features apart from an AI-ready data foundation, evaluate technology partners with five practical questions and measure the hours data debt costs their firm. The session then connects data to people. Amid a growing talent shortage, the time better data returns is best reallocated to retraining and redeploying current staff, not reducing headcount.

Learning Objectives

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

1. Assess their firm's data balance sheet by identifying data assets and data debt
2. Calculate non-billable hours lost to data debt
3. Evaluate technology partners using governance and data-readiness questions
4. Develop a plan to reallocate recovered non-billable time

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Spend It Right

Data Is Today's Currency — Time Is Tomorrow's.

TODAY'S CURRENCY

Data

TOMORROW'S CURRENCY

Time

THE PREMISE

Data is the currency of today. Spent right, it produces the currency of tomorrow: time.

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WHO IS IN THE ROOM?

One currency — four seats at the table

CEO

GROWTH & OWNERSHIP

What the firm is worth and how ready it is for the next owners

CFO

MARGIN & TRUST

One version of the numbers and the hidden cost of reconciling them

COO

CAPACITY & PEOPLE

Delivering more work with the team you have in a tight talent market

CTO

PLATFORM & AI

Choosing an architecture, not just buying features

For the next generation of owners, the firm you inherit is only as clear as its data.

Agenda

01 **The balance sheet you don’t report**
What you hold and what you owe

02 **Spend it right**
AI ready vs. AI available

03 **The bridge: data to people**
Closing the talent gap

04 **The return is time**
Your Monday moves, then Q&A

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1

The balance sheet you don’t report

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YOUR DATA BALANCE SHEET

Every firm holds a data balance sheet

Assets: currency you hold	Liabilities: data debt you carry
Years of project history	Inconsistent project and phase coding
Labor, utilization and rates	Spreadsheets that became the real numbers
Margin by client, PM and service	Reports only one person knows how to build
Backlog, pipeline and win rates	Definitions that change from office to office

Net position: what leadership can answer in one day without a special report

Few firms report this balance sheet. Every buyer audits it.

THE COST OF DATA DEBT

Data debt charges interest every month

1

Month-end close

Days spent reconciling before anyone trusts the numbers

2

Leadership meetings

Time spent debating whose number is right instead of what to do

3

Stalled AI pilots

Tools that stall because the data beneath them can't be trusted

4

Firefighting

Problems found after they reach the margin, not before

The interest is paid in the one currency you can't earn back: time.

A WORKSHEET FOR YOUR FIRM

Put a number on the interest

Where the hours go	Hours/month	People	Hours/year
Reconciling numbers at month-end	____	____	____
Building and rebuilding reports	____	____	____
Chasing project status for PMs	____	____	____
Answering the same question twice	____	____	____
Your annual interest payment			____

Hours/month × people × 12 = the time your data debt costs each year

OWNERSHIP TRANSITION & M&A

The next owners audit your data first

WHAT THEY ASK

- ? Margin by client and project type five years back
- ? How much of the backlog is truly profitable?
- ? Utilization and multiplier by office
- ? Which projects are trending over budget today?

Internal transition or outside sale, the next owners buy your data along with your firm.

Slow answers raise doubts. Doubts shape the price.

2

Spend it right

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WHAT AI IN YOUR ERP CAN MEAN

Three answers to “Does it have AI?”

AI AS A FEATURE

Factory navigation

Lives inside the vendor’s screens

The vendor chooses it

Sees the record in front of you

AI READY

A screen with no connection

The data foundation is in place

No assistant is connected yet

Potential, not yet a return

AI AVAILABLE

CarPlay for your firm

Works in the assistant you already use

You choose it under your rules

Answers and acts across the firm

A feature is something you buy. Availability is something you build.

THE FRAMEWORK

Two moves turn data into a return

MOVE 1 · AI READY

Make it spendable

Current: Refreshed continuously, not by overnight extracts

Governed: One secure copy and one version of the truth

Meaningful: Defined in the terms leaders use

MOVE 2 · AI AVAILABLE

Put it in circulation

Visible: Dashboards built on the same definitions

Askable: Plain-language questions in the assistant people already use

Actionable: Governed changes that flow back into reporting

Ready is the foundation. Available is the return.

Make it spendable: Where do you stand?

Test	Signs of data debt	Signs it's spendable
Current	Reports run on last night's extract	Leaders see today's numbers
Governed	Every office keeps its own copy	One secure copy, one truth
Meaningful	"Margin" means three different things	Each term is defined once firm-wide
Unintrusive	Analysis slows the people doing the work	Analysis runs on its own copy

Score yourself on each row. Most firms pass one or two.

MOVE 2 · AI AVAILABLE

Put it in circulation: Who spends it?

1

Principals see it

Dashboards on the same definitions the CFO uses; no reconciling before the meeting.

2

PMs ask it

Plain-language questions in Copilot or another assistant answered from governed data.

3

Teams act on it

Requested changes run through governed steps recorded and reflected in reporting

Currency only creates value when it moves.

WHAT IT LOOKS LIKE ON A TUESDAY

One question: minutes instead of days

1

Ask

"Which of my projects are trending over budget this month?"

2

Answer

The assistant reads governed data using the firm's definition of budget.

3

Act

The PM requests a change, and it runs through a governed workflow.

4

Report

The change appears in every dashboard. Everyone sees one answer.

Illustrative example

THE TEST

Five questions for every vendor

CTO	Is our data current enough to run the firm on without slowing daily work?
CFO	Who defines “margin,” and is it the same in every report?
CTO	Can we use the AI assistant we already own or only yours?
COO	When AI changes a record, who approves it, and is there an audit trail?
CEO	**If ownership changes hands, how quickly can we answer the next owners?**

Ask them of every vendor, including the one you have today.

WHAT THIS LOOKS LIKE IN PRACTICE

BST ERP: Proven data, now spendable

1	**Proven ERP data**	The same transaction database A/E firms already run their business on	AI ready
2	**Microsoft Azure**	Where the application runs: secure, hosted and maintained	AI ready
3	**Microsoft Fabric**	A continuously updated copy for analysis, with business meaning defined once	AI ready
4	**Your people and their assistants**	Power BI to see it, Copilot and other assistants to ask and make governed changes	AI available

Disclosure: I work for BST Global. The five questions apply to us too.

3

The bridge from data to people

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THE GAP AHEAD

The work is outgrowing the workforce

1

Experience is retiring

Senior engineers and principals leave, and their knowledge often leaves with them.

2

The pipeline is thin

There are fewer graduates and experienced hires than the backlog demands.

3

Skilled people do admin

The people you can't replace spend hours on work a system should do.

You can't hire your way out of this gap. You can reallocate your way across it.

There are 679,500 engineering positions open nationwide, while only ~141,000 engineering graduates enter the workforce each year.

Source: EY, April 2026.

REDUCE HEADCOUNT

Saves cost once
Knowledge walks out the door
Capacity for growth shrinks
Trust in new tools collapses

REALLOCATE TALENT

Returns value every month
Knowledge stays and grows
Capacity fills the talent gap
People adopt what helps them

WHAT THIS IS, AND WHAT IT ISN'T

The goal isn't fewer people. It's the right people on the right work.

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THE OBJECTION WORTH ANSWERING

You sell time. Which time comes back?

BILLABLE TIME

What clients pay for

Design, architecture and delivery

Spending data well protects this time. It doesn't shrink it.

NON-BILLABLE TIME

What data debt consumes

Chasing and rebuilding reports

Reconciling numbers before meetings

Waiting for month-end to see a trend

Answering the same question twice

Spending data well returns the second column, not the first.

REALLOCATION IN PRACTICE

Same people, higher-value work

Role	From: feeding the data	To: spending the time
Project manager	Chasing status and budgets	Leading clients and teams
Accounting	Reconciling at month-end	Advising PMs on margin
Report builder	Rebuilding the same reports	Analyzing trends and risk
Principal	Waiting for the numbers	Developing the next leaders
Coordinator	Rekeying data between systems	Managing the exceptions

Every role keeps its person. Every person gains a better job.

BRIDGING THE GAP

Three steps: Free, retrain, redeploy

1

Free the hours

Measure the non-billable data work, then let the platform take it.

2

Retrain your people

Build skills toward the roles you can't hire for: project leadership, analysis, client development.

3

Redeploy from within

Fill the gap from your own bench before you post the job.

The people who know your clients and your projects are already on your payroll.

CONSISTENT INTELLIGENCE

Knowledge that stays when people move

WHEN IT LIVES IN PEOPLE'S HEADS

Every retirement is a data loss.

Every new hire starts from scratch.

Every office has its own answer.

WHEN IT LIVES IN GOVERNED DATA

Experience is captured, not lost.

New people ramp up on firm history.

Every office gets the same answer.

4

The return is time

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WHERE THE TIME GOES

Returned time becomes capacity

1

Capacity

More work from the team you already have in a market short on talent

2

Earlier decisions

See a project's trend while there is still time to change it

3

Prevention

Leaders spend their hours preventing problems instead of fixing them

4

Readiness

Answer an owner, partner or buyer in hours, not weeks.

The return compounds: Every hour returned is an hour you can reinvest.

MONDAY MORNING

One Monday move for every seat

CEO

Make data part of ownership strategy. List 10 questions leadership can't answer in a day.

CFO

Price the data debt. Fill in the worksheet with real hours from your team.

COO

Draw the redeployment map. Match freed hours to the roles you can't fill.

CTO

Ask every vendor the five questions, starting with the one you have today.

None of these requires buying anything.

SPEND IT RIGHT

Data is today's currency. Time is tomorrow's.

Spend it right, and invest the return in your people.

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Questions

How long does it take to make data spendable?

Who should own data at the executive level?

How do we bring our people along?

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This concludes The American Institute of Architects Continuing Education Systems Course

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