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PATHWAY TO PRINCIPAL AND CONSULTING SERVICES:

**A WORKSHOP FOR THE ARCHITECTS AND
ENGINEERING BUSINESS COUNCIL MEMBER
COMPANIES**

August 14, 2008

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PATHWAY TO PRINCIPAL AND CONSULTING SERVICES: A WORKSHOP FOR THE ARCHITECTS AND ENGINEERING BUSINESS COUNCIL MEMBER COMPANIES

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COUNCIL ANALYSIS OF CERTIFIED TRAINING

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EXECUTIVE SUMMARY

ZweigWhite delivered its headline seminar, *Pathway to Principal*, to approximately thirty-five members of the A/E Business Council of Jordan from June 23 – 25, 2008. This program is designed for those aspiring to be leaders and principals within their firm; as well as current principals who want to benefit from learning business essentials, concepts, and the best practices we see at the fastest growing and best performing firms in the industry.

Although normally a two-day program, this educational session included an extra half-day to answer questions from the previous two days and to hone in on strategic planning and the essential elements, goals, and deadlines that need to be written into a solid plan. The themes covered on the first day were: What It Means to be a Principal, Strategic Business Planning, Project Management for Principals, and Financial Management and Metrics. The subject areas for the second full day included Organizational Structure, Attracting and Retaining Talented Team Members, Strategic Marketing, and Business Development and Client Relationship Management. Each participant received a copy of the program slides. The A/E Business Council was given a non-PDF form of the slides for future use. The presentation will be submitted to SABEQ as a separate document.

ZweigWhite has been assisting AEC (Architect Engineering Consulting) firms reach their potential for twenty years. During this time, it has developed a rich history of conducting management education, training, and seminars in the industry, for the industry. Because the interest and knowledge level of all participants can vary greatly, it is our experience that it is simply impossible to satisfy everyone all of the time. We make every attempt possible in our marketing material online and in print to clarify what this program is about, whom we recommend attend and what the content will be.

With this in mind, we also believe the A/E Business Council was explicit in their marketing materials to the members and potential attendees of what this seminar intended. There were, however, attendees that stated the content was too general in nature and too basic for their needs. These participants requested to hear more real life examples, case studies, and have specific issues addressed. There was an equal number of members who were pleased with the material covered and when we switched up some of the chapters to pass over the more fundamental concepts, they were disappointed and wanted each slide covered as printed and promised.

We gauge the success of our programs on the interest level and sophistication of questions and comments that arise from the audience. It is our observation that this grouping in Amman was very willing to engage in debate and posed very challenging questions against the many unconventional ways of managing firms we presented—more advanced than we see at our domestic presentations.

There are many facets of the audience that are quite unique to the Jordanian AE industry which we believe serve as a compliment to each and every person and firm that attended, namely: (1) sophisticated strategic plans, (2) exceptional management systems, (3) strong teams, (4) commitment to change, and (5) determination to work together.

Following the Pathway seminar, it was intended that ZweigWhite meet with six firms for on-site consulting and business plan review. In actuality, we were able to meet with eight firms and discussed their immediate needs such as growth, project management issues, organizational alignment, leadership development, business development, and ownership planning. These meetings are summarized in a separate report to follow.

Though not contained within the Statement of Work, we also conducted a special half-day session on the extensive topic of growth and sustainability at architecture and engineering firms. This specifically discussed ownership options and exit strategies—both broad and narrow-based, as well as, ESOP and merger and acquisition activity and possibilities. It provided a case study and metrics to gauge firm readiness. This session also covered the issue of leadership—how to identify and develop leaders within the firm, the difference between leading and managing, and leadership traits and responsibilities. This was a special request of the Council as the members displayed a very keen interest in learning more on this issue—and it is our experience that ownership planning and sustainability are among the top challenges and most highly sought after elements in our consulting practice. Again, we were very pleased to see this level of fascination and enthusiasm for ownership.

Producing, hosting, and arranging a seminar and consulting sessions like this held in Amman required a great deal of preparation and discussion among all parties involved. It was a great pleasure to work with and personally meet all stakeholders—those from USAID Jordan Economic Development Program (SABEQ), USAID, and the Council. It is apparent that everyone is committed to the mission to “hoist its members’ professional capabilities, competitiveness, and ability to export globally”.

Further collaboration between the Council and ZweigWhite has been discussed in the form of possible leadership training, and a co-produced, region-wide conference next fall.

CONSULTING SERVICES

As a follow on to the *Pathway to Principal* seminar, the ZweigWhite consultants met with Maisam Architects and Engineers, Engicon, Consolidated Consultants (CC), Arab Center for Engineering Studies (ACES), Consulting Engineering Center/Sajdi & Partners (CEC), SIGMA Consulting Engineers, Arabtech Jardaneh, and Dar-ALOmran in Amman to review business plans, assess processes, validate organizational structures, and offer recommendations to operations and strategies.

The following summarizes the visits to those firms. There were no direct deliverables required in this engagement and all notes, drawings, and diagrams from the discussions were left on site with the client.

Maisam

Meeting Structure

Christine Brack met with Hazem Mimri, Meisa Batayneh, and Halah Mansour at the offices of Maisam Architects and Engineers. Nikki de Carteret, who assisted with the firm's strategic plan, also attended this meeting. ZweigWhite devised the strategies and recommendations with input by Maisam.

Key Issues Addressed

- We reviewed the strategic plan, validated that the goals were sound and in accordance with the firm's position in the industry and desires for going forward.
- We reviewed the firm's project management processes and organizational alignment. A great deal of discussion took place on broadening the Design Lab to include production as part of the core system within Maisam. We discussed best practices on project delivery—as well as resource sharing, task and project ownership among project managers, and increasing production efficiencies.
- The latter part of the day covered financial and accounting metrics such as chargeability, profitability, overhead calculation, and net service revenue. Further discussion included ownership planning—particularly in terms of offering shares to employees and the valuation of those shares. This was an informational session and no particular recommendations were made regarding the firm's metrics.

Strategies, Recommendations, Comments

- The work performed during their previous planning sessions was excellent and we needed only to validate it and suggest further enhancements that really called out the firm's unique culture and value proposition. It is my opinion that Maisam is on track with its strategic plan and that constant communication of that plan to the staff is essential to keep everyone focused and committed.
- All thoughts and recommendations regarding Maisam's organizational chart were made on site and the notations were left with the firm for further consideration and decision.
- By widening the Design Lab to include production, the team will then feel a heightened sense of belonging to the core that is uniquely and proudly Maisam.
- I do invite all participants of this session to contact me with any further questions they may have regarding anything we discussed or anything that may arise in the future.

Engicon

Meeting Structure

Christine Brack met with Tarek Zuriekat, Raid Zureiqat, and Mazem Hijazeen of Engicon. This one-day session began with an overview of an organizational structure that had been recently drafted and in consideration. My role was to offer a critique and then consult on possible improvements to it. Engicon identified the issues to discuss and ZweigWhite offered recommendations with input by the team from Engicon.

Key Issues Addressed

- Organizational structure: We spent several hours discussing the merit and importance of work groups, business units, and resource pools strategically placed so that projects can more smoothly, rapidly, and profitably move through Engicon. As projects are what the firm does for a living, ZW suggests organizing the firm along project and business unit lines. We also discussed the business development, marketing, and tendering departments and roles—and where these departments fall into place, to whom they report, and to what capacity they serve within the organization.
- I was shown the web-based project management tools that an outside consultant had designed for Engicon. The Engicon team noted they are not happy with the results and that much work is still needed on the tools and processes still in place. I made my commentary as we moved through the tools—some were essential and I was glad to see them in use, some needed a bit of tweaking, and some tools were redundant—making the process of project delivery a bit cumbersome and over-managed. This discussion included best practices and the participants liked the recommendations and took many notes to use later as they completed the initiative of optimizing their project management process.

Strategies, Recommendations, Comments

- All the participants in this session—although reticent at first—were very receptive and open minded to the idea of a more streamlined and project-focused structure. All agreed that projects and project delivery to the client are great priorities and that the drafted version would make the client happy—as well as those within Engicon. The notes and drawings during this session were left at the firm for further contemplation. When the team felt we had made significant progress on that issue, we turned the attention of the afternoon to project management and optimization.
- Engicon has obviously found success in the quality of services it delivers and has a strong business development culture naturally in place. It is dedicated to cleaning up bottlenecks in its systems and will likely make this happen by the start of the fourth quarter. The introduction of a new organizational structure and a refined project management system requires a methodical launch with a clear message and communication plan. Repeated messaging and then guidance to adhere to the processes specifically are also necessary. The leaders that were in the consulting session are the role models to shepherd these efforts but there is no doubt they will be successful in carrying this out.

Consolidated Consultants (CC)

Meeting Structure

Christine Brack met with Ziad Muhtaseb, Amjad Said, Imad Masri, Issam Balbisi, and Hanan Awad for two consulting days at the offices of Consolidated Consultants. CC prioritized the list of issues they wanted to discuss and we moved through each topic over the course of the two days. ZweigWhite made recommendations with input and feedback from the team at CC.

Key Issues Addressed

- Strategic planning – validating the firm’s strategic plan and some business unit plans written to date. Appropriate KPIs were discussed for goals written.
- Organizational strategy—this facilitates the strategy of the firm to happen, sets the tone for good governance, fosters a good communication plan, and aids retention and motivation for employees. CC’s organizational structure was discussed—particularly offering the idea of a client focused / client type as business unit arrangement.
- PMO best practices—because profitable projects fuel our growth, it is important we are thinking in the most strategic way possible—such as getting the necessary training for the team, which also aids in retention.
- HR issues—we need people for our firm and we want to treat them well. Having all the above things in place helps make our job in this area easier. Career path can also be placed in this category though it is a leadership responsibility and not necessarily that of HR. HR assists in an important way.
- Marketing strategy and business development—CC has increased its marketing collateral and has demonstrated good use of marketing tactics we see in successful US firms. This needs to be paired with an equally strong culture of business development that must be fully supported by leadership. Of any area, CC is weak in its firm-wide acceptance and practice of business development—though from Amjad, it is quite strong and he is obviously very experienced and knowledgeable in this area. His skill and talent is underutilized.
- Ownership schemes and succession planning—leadership planning and leadership training should happen over the next eighteen months. It is likely a leadership assessment will be performed to understand the status of the rising stars and where future investment should be made.

Strategies, Recommendations, Comments

- CC was advised that it is important to understand we will always be working on these areas—because we will always be growing—and always wanting to improve. It is also a common trait of A/E firms to underestimate the work they have done to date in these areas and think they are not doing a good job. Consolidated Consultants is doing an *excellent* job—particularly in that it has the ambition to implement changes necessary to keep it a great firm, provide opportunities to its team members and continue to grow.

Arab Center for Engineering Studies (ACES)

Meeting Structure

Giles Jacknain met with the two founding partners of the firm, Dr. Omar Abdulhadi and Dr. Izz ED-Din Katkhuda, and the director of marketing and business development, Samir Said. He also interviewed the CFO, Khamis Noubani, the Corporate Coordination Manager, Ayoub Lubbad, and the Corporate IT Manager, Nadi Masalha. ZweigWhite facilitated this session and made strategic recommendations with input from the ACES team.

Key Issues Addressed

- Integration of Satellite Offices – Over the past two decades, ACES has grown to more than 20 offices around the world. Several of these offices are now larger than most of the A/E firms in Jordan. This rapid growth has resulted in a disconnection among the offices and the HQ. Reestablishing these connections will enable ACES to take full advantage of economies of scale, central management, and mobile resources.
- Incentive Compensation – The current incentive compensation structure at ACES emphasizes the performance of the individual offices over the performance of the firm as a whole.
- Leadership Development – The founding partners of ACES recognize that the continued growth of ACES necessitates creating a layer of dedicated top management.

Strategies, Recommendations, Comments

- Office Planning – Developed a template for annual geographical business unit planning. The template enables the leaders of the ACES offices to generate comparable business plans using revenue expectations as the base input.
- Office Performance Evaluation – Established a system for regularly evaluating offices based on defined KPIs. Determined how evaluation process would enable ACES leaders to better integrate all offices into a single entity.
- Evaluation of Ownership Structures – Discussed the relative merits of internal sale (MBO or ESOP), strategic sale, financial sale, and IPO, determined what resources ACES would require to go down any one of these paths, and addressed questions regarding distribution of ownership to managers.
- Leadership Development – Described the key roles and responsibilities for professional top-level management. Together the consultant and the team developed strategies for attracting viable management candidates from within ACES as well as from around the world.

Consulting Engineering Center / Sajdi & Partners (CEC)

Meeting Structure

Giles Jacknain conducted a one-day meeting, split into two parts: morning with the Managing Director, Izzat Aziz Sadji, and the afternoon with both him and his management team (director of finance, director of marketing and business development, director of strategy, director of human resources, and director of project management). ZweigWhite made recommendations through the discussion with input from the CEC team.

Key Issues Addressed

- **Ownership Distribution** – Looked at a variety of options for broadening ownership while still keeping much of the ownership in the family. Reviewed a proposal for an ESOP-like structure that would make portions of the firm available to managers using differing series of shares in order to limit their control while facilitating financial returns. Talked about various valuation calculations and their relative merits.
- **Incentive Compensation** – Discussed ways to link incentive compensation more clearly with performance and perhaps use ownership as an element of incentive compensation. Compared several methods of incentive compensation and what might prove most effective at CEC.
- **Recruiting and Retention** – Determined that CEC faces challenges similar to those the other members of the A/E Business Council endeavor address regarding recruiting and retention. Clarified that the best response would combine a campaign dedicated to publicizing the advantages of working at CEC, while targeting team members less interested in pursuing careers in the GCC (women, people with strong ties to the Jordanian community).

Strategies, Recommendations, Comments

- **Ownership Distribution Linked to Incentive Compensation** – Made minor revisions to the planned ownership distribution documents to clearly associate ownership opportunities and advantageous terms with performance. We also structured an ESOP-like system to link key team members to CEC through ownership opportunities.
- **Established Point of Differentiation** – CEC has successfully survived on government contracts for several years due primarily to its facility for exceptional efficiency and careful management. Now that the firm plans to branch out into more private sector work, it needs to understand how it can translate the value of these qualities to these new clients.
- **Validated Target Markets** – Examined assumptions regarding CEC targeting more clients that are private and concluded that the move would prove an effective strategy for growing the firm. Laid out a step-by-step plan for marketing and business development based on the established point of differentiation and a clear understanding of the target markets.
- **Recruiting and Retention Campaign** – Built a recruiting and retention program around the essential differentiator of CEC, exceptional management. Determined that

emphasizing the advantages of this aspect of the firm would attract and retain talent, by offering resources and opportunities unavailable at less well-run firms.

SIGMA Consulting Engineers

Meeting Structure

Giles Jacknain conducted a one-day meeting with approximately 20 of the firm's leaders and managers (who were not introduced), including the President and Managing Director, Hani I. Hakki and the Director of the Planning and Programming Department, Dr. Hani Obeid. The first part of the meeting we spent brainstorming about challenges facing SIGMA and the second part of the meeting determining how to address those challenges.

Key Issues Addressed

- **Recruiting and Retention** – Like many competitors, SIGMA feels the pinch when it comes to finding and retaining top talent. While the firm has implemented a number of benefits geared toward making working their more appealing, it had not combined these into an overarching strategy to differentiate working at SIGMA from working with competitors.
- **Operational Management** – SIGMA has developed its own proprietary system of operational management. It facilitates work balancing and disciplined project management, but the team has yet to integrate with international quality control standards such as ISO 9000.
- **Competitive Response** – The exceptional economy has lifted all firms on the rising tide, resulting in recognition of the need for the development of a clearer competitive advantage. As more firms compete for work and for talent, each individual firm will have to do more than rely on its reputation to retain its position in the competitive landscape.
- **Powerful Clients** – Large developers demand increased levels of service even as they push down on prices, and their deep pockets and the availability of competitors enables them to do just that. SIGMA recognizes that it needs to better illustrate the value it creates in order prevent its clients from pressuring it too much.

Strategies, Recommendations, Comments

- **Increase Operational Efficiency** – SIGMA has already made exceptional strides in this regard. The challenge of attracting additional talent, however, seems so daunting that SIGMA has determined that it can build on its effectiveness to continue to produce more with less.
- **Quality Control** – Examined key aspects of the SIGMA operational model and suggested opportunities for coupling it with quality control methodologies. Highlighted the most challenging aspects of quality control and determined that SIGMA needed to prioritize addressing those that resulted in errors of quantity.

Arabtech Jardaneh

Meeting Structure

Giles Jacknain conducted a two-day meeting, broken into several smaller sessions focused on specific aspects of the firm.

Attendees included, Bisher Jardaneh, Executive Managing Director, Hakam Bitar, Managing Director-Buildings, Walid Abu Gosh, Managing Director-Roads and Transportation, Hatem Tieby, Project Development Management Director, Fawzi Abu Moghli, Buildings Supervision Director, Elias Dardas, Support Director, Hisham Abdelmalik, General Manager-HDP Overseas, Amjad Shair, Operations Director-AJ Egypt, Jamal Soudi, International Operations Manager, Robert Gauld, Operations Director, Hamzah Awwad, Operations Support Manager, Samer Zidan, Financial Manager, Moh'd Baker, IT Manager, Sofyan Bani Hani, Operations Support Supervisor, Khalil Al Wazir, Head of Enterprise Performance Unit, Majed Zumot, Principal Engineer - R&T, Suhail El Nimer, Principal Healthcare Planner, Arkan Hashimi, Principal Engineer - Mechanical, Fathi Jaber, Principal Engineer - Electrical, Judit Naji, Principal Engineer - Structural, Khalida Farayeh, Principal Architect, Ameen Al Ani, Principal Engineer - Technical Development Office, Hiba Abbadi, Technical Development Engineer, Meleen Othman, Organization Development Supervisor, and Duha Rahhal, Organization Development Officer.

Approximately another 25 mid level team members joined the meeting to discuss opportunities for employee ownership and to listen to a presentation delivered by ZweigWhite on the most important trends at the top A/E firms in the US.

Key Issues Addressed

- Project Management System – AJ currently relies on “weak” project management (a technical term, not an evaluation). Discussed whether this system, in which PMs shepherd but do not take responsibility for projects, facilitated the operational effectiveness the firm wanted to realize.
- Organizational Structure – Looked at alternatives to the discipline-based structure of AJ, spurred on by the need to incorporate client specific organizations in Abu-Dhabi and production facilities in Egypt.
- Training and Development – Examined procedures for training and development, assessing the role of a single office in leading all training and development efforts. Considered what position this office should have in the organization as a whole (one integrated office for all disciplines and business units, or several offices dedicated to different business units), and which additional responsibilities it should be responsible for.
- Architectural Excellence – Considered three possible avenues of achieving architectural excellence at AJ: becoming an exceptional prime architect working with world-class design architects, building an architecture studio that would eventually do most of the design work of AJ, or becoming a world class design architect.
- ESOP – The leaders of AJ presented the ESOP program and took questions from the team members who would have the opportunity to participate in it. ZweigWhite

then presented an assessment of the program and answered questions on how the program shaped up to similar such offers in other countries.

Strategies, Recommendations, Comments

- Office of Technical Development – Set up dedicated team members to oversee training, design and implementation of standards, and evolution of CAD capabilities. This office reports directly to the business unit leaders and works with the principals of each discipline to continue to improve AJ team members and AJ production.
- Redefine the Role of Project Managers – Move to a “balanced” project management system, where project managers have responsibility for the successful delivery of projects.
- Focus on Prime Architecture and Engineering – Team with the top level of design architects from around the world to create exceptional projects.

Dar-AIOmran

Meeting Structure

Giles Jacknain conducted a one day meeting with the business unit managers Jalal A. Malhas, Engineering Services Department Manager, Tahseen A. Hamed, Marketing and Developing Manager, Raouf M. W. abu-Laban, Architect – Manager, led by Anas C. Sinno, General Manager and Wael F. Al-Tabba', General Management Advisor. Reviewed overall strategic plan during the first part of the day, and focused on the presently completed business unit plans (engineering, architecture, and marketing) during the second part of the day. ZweigWhite made recommendations and facilitated the idea generation in this session with input from the Dar-AIOmran team.

Key Issues Addressed

- Leadership Development – Established the viability of creating an apprenticeship model whereby which the leaders of the functional and professional business units would take on an associate leader in order to prepare them for taking over the leadership position. Dar-AIOmran has already done this at the Executive Director level with some success.
- Recruiting and Retention – Discussed potential competitive responses to the talent crisis faced by Jordanian firms.
- Viability of Goals – Examined the goals established in the Dar Al Omran strategic plan. In several cases the goals appeared underdetermined (not quantifiable, non specific). In other cases, the goals did not appear to support the implementation of strategies.
- Organization Structure – Evaluated the possibility of dividing Dar Al Omran into its component parts (e.g. architecture and engineering) in order to develop different value propositions for each piece of the firm. Also looked at how Dar Al Omran might incorporate additional service offerings into its structure.

Strategies, Recommendations, Comments

- Development of Strategic Projects – Promoted the viability of strategic goals by transforming them into strategic projects with defined timelines and associated tasks. Determined that each goal should entail a strategy statement that would describe the linkage between the goal, the associated actions, and the strategies of Dar Al Omran.
- Point of Differentiation – Recognized that Dar Al Omran realizes a great deal of value from its incredible position as the established leader in Islamic architecture. Determined that it should further pursue the development of this point of differentiation by establishing a value proposition that combined the interpretation and introduction of traditional Islamic design tropes with state of the art technologies, project management, and project delivery methodologies. This will serve to attract both clients and team members.
- Service Offerings – Established that Dar Al Omran should remain unified in order to promote its new value proposition. Further determined that landscape architecture

and interior design services would most likely not add significant value to the firm's portfolio, unless Dar Al Omran could find designer who could couple these services with Islamic design tropes.

Conclusion, Recommendations, Next Steps:

The *Pathway to Principal* seminar was extremely well attended but it is recommended that participants be fully aware of the audience it is best suited for—those on the route to becoming a Principal or leader within the firm or those leaders and Principals that want a refresher course in the business areas of an architecture or engineering practice.

The one-on-one consulting sessions were most effective in touching the particular issues firms found most critical in their operations and these questions were handled in a more detailed and proprietary manner. Receiving firm information and background material ahead of time assisted in us learning more about their situations so we could better consult once on-site. We have advised each firm to take the recommendations on step further and continue to discuss those areas among the top level and mid-level managers and leaders. Our contract work only included these office visits (no deliverables), but each firm has been encouraged to remain in contact with us and to reach out with any questions they may have.

Although we structured each of the meetings somewhat differently and focused on a variety of topics, working with the top firms in Jordan, ZweigWhite had the opportunity to note several similarities among the firms.

Areas of Strength

Operations and Project Management

Firms have well-defined, well-implemented, and well-followed processes for managing projects and for overall operations. Several of the firms participate in programs geared toward certifying operational systems and managers (e.g. ISO 9000, PMI, etc.) and two had won national awards for operational excellence.

Well Developed Strategic Plans

These firms made excellent use of the opportunity afforded to them by the A/E Business Council of Jordan to create highly detailed, deep strategic plans. The plans establish clear goals and priorities, typically reaching down to the business unit level.

Solid Leadership

Given the overall position of these firms in the marketplace, the quality of their leadership should not come as any surprise. The leaders of these five firms all display an exceptional awareness of their firms' relative qualities as well as of the A/E business as a whole.

Areas of Concern

Recruiting and Retention

The sheer amount of capital available to Gulf region firms has created an almost untenable situation for Jordanian firms. Not only can firms in the Gulf easily outbid Jordanian firms for talent, they can offer so much as to make differentiating qualities almost meaningless. All five firms had numerous stories to tell about team members departing in droves for higher salaries.

Leadership Development

While the current leadership teams feel confident and comfortable, they do not necessarily see who will take over from them in the future. Putting programs for operational effectiveness in place has created excellent managers, but firms have not made the same effort to create new leaders.

Ownership Structures

Concerns over leadership development relate to questions about ownership structures. Firm leaders have begun to explore changes in this area in order to broaden ownership and more closely align growing leaders with the firm as well as to establish potential avenues for exit. Jordan has fairly rigid laws

Going Forward

We are interested in an ongoing, collaborative relationship with each of the firms and with the Council. To that end, ZweigWhite and the Council will be discussing conference opportunities to be hosted in the Gulf Region next year, as well as, ongoing training seminars. The topics of these seminars will be determined once the Council has performed its Leadership Assessments and other surveys of the members' needs.

APPENDIX: TRAINING MATERIAL (POWERPOINT PRESENTATION)

Sustainable Achievement of Business Expansion and Quality
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