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Participate in the 2009 Branch Office Management Survey and save more than 75% off the new report!

TO: Architecture, Engineering, Planning & Environmental Firm Branch Office Managers
 FROM: Rachel Ward-Sullivan, Editor & Survey Coordinator, ZweigWhite Management Surveys
 DATE: May 2009
 RE: 2009 Branch Office Management Survey of Architecture, Engineering, Planning & Environmental Consulting Firms

As a branch office manager, you know you have a lot to manage. But you're not alone—in fact, research shows that in addition to office management responsibilities such as finance and operations duties, branch office managers are also typically responsible for marketing and business development tasks, project management roles, and design and technical work. How do they get it all done, and what are they paid for it? **ZweigWhite's 2009 Branch Office Management Survey of Architecture, Engineering, Planning & Environmental Consulting Firms**, the only source of information dedicated to A/E firm branch office management, will help you answer these questions.

By completing the enclosed survey questionnaire, you'll be entitled to a **FREE copy of the executive summary**, as well as a **\$45 copy of the full results**—a \$195 value! You'll also be helping your firm better understand how to help branch offices and branch managers like yourself be more successful. The deadline for participation is July 3, 2009. You're also invited to **complete the questionnaire online**, at www.zweigwhite.com/go/survey.

NEW this year: The 2009 Branch Office Management Survey will be distributed as an electronic report (PDF), providing some great benefits to you. When you order the survey, you'll receive the license to share it with your entire firm. The report will also contain color charts and be completely searchable, so you can easily find the data you need. Plus, distributing the survey electronically allows us to reduce the price significantly (previous editions cost \$95 for participants and \$445 for non-participants).

Here are some of the questions that the 2009 Branch Office Management Survey will answer:

- ⇒ What could headquarters offices do to better communicate corporate goals?
- ⇒ What is the best way to facilitate sharing work on a project among staff from multiple offices?
- ⇒ How much do branch office managers earn in base salary, bonus, and overtime pay?
- ⇒ What are the keys to success and reasons for failure of branch offices?

Who is ZweigWhite? We exist to help leaders in the architecture, engineering, and environmental consulting industries achieve their business and personal goals. We publish more than 20 management surveys for firms like yours, as well as *The Zweig Letter*, the only weekly management newsletter for the industry.

Strict confidentiality: Rest assured that your answers to these important and sensitive questions will remain confidential. You'll notice there is no place to enter your name on the questionnaire. All questionnaires and order forms are separated in our mail room before data entry begins.

Directions: Here's how to participate and receive your specially discounted report:

1. **Complete the questionnaire.** Any branch office manager, in any firm, may participate. The survey questions are easy and should take you less than 30 minutes to complete. Please do not put your name on the questionnaire.
2. **Fill out the order form.** If you'd like to receive your free copy of the executive summary, or the full results for the participants' price of \$45, you must complete the information on the order flap and return it with your completed questionnaire. The results will be e-mailed in August 2009. Payment must be received before the results are e-mailed in order to take advantage of this special offer.
3. **Return your completed questionnaire (and optional order form) by July 3, 2009** to ZweigWhite, 321 Commonwealth Road, Suite 101, Wayland, MA 01778.

Questions? Please call me, Rachel Ward-Sullivan, at 800-466-6275 x262 or e-mail me at rwardsullivan@zweigwhite.com if you have any questions or would like more information.

You'll want to see this new report, so complete your questionnaire now! **The deadline is July 3rd.**

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Wayland, MA
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 Washington, DC

2009 Branch Office Management Survey

of Architecture,
Engineering, Planning &
Environmental Consulting Firms

Confidential Questionnaire: Must be completed and returned by July 3, 2009.

Stop! Are you a branch office manager in one of the following types of firms: architecture, engineering, planning, environmental consulting, interior design, land surveying, landscape architecture, construction management, or design/build?

- Yes.** Please turn the page. Answer the questions that are relevant to your firm.
- No.** Please ask the appropriate person in your firm to complete this questionnaire.

You'll receive a complimentary executive summary of the survey results just by completing this questionnaire! See the order form at the end of the questionnaire for more information.

Complete this questionnaire online! Go to www.zweigwhite.com/go/survey.



ZweigWhite
321 Commonwealth Road
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Wayland, MA 01778

Tel: 800-466-6275
Fax: 800-842-1560
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www.zweigwhite.com

Please read before beginning

ZweigWhite is conducting a comprehensive and unique study of branch office management practices in A/E/P and environmental consulting firms. This is a confidential survey. Do not put your name on the questionnaire. **While the results will be published in summary form, no one will be able to identify you or your firm as a participant.**

The questions are not difficult; it should take less than 30 minutes to complete the questionnaire. If you need assistance with any of the questions, or would like more information, contact Rachel Ward-Sullivan at 800-466-6275 x262 or rwardsullivan@zweigwhite.com.

To receive your complimentary executive summary of the survey results, you must also return the enclosed order form. It is attached to the last page of your questionnaire— if you misplace it, please call.

Return your completed questionnaire by July 3, 2009 to:

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Firm Background

- Which of the following best describes your firm overall? (check one)
 - Architecture or Interiors ^A
 - A/E (primarily architecture) ^B
 - Single-discipline Engineering ^C
 - Multidiscipline Engineering (two or more disciplines, but not full-service) ^D
 - Full-service Engineering or E/A (civil, structural, mechanical & electrical; other services may include architecture, etc.) ^E
 - Design/Build (more than 50% of revenue from design/build services) ^F
 - Environmental Consulting (engineering and/or science; environmental focus) ^G
 - Other _____ ^H
- In what state is your firm headquartered? _____
- Approximately how many people are currently employed by your firm overall? (full-time equivalent in all offices, including owners who work in the firm) _____
- Which of the following staff size categories does your firm fall into?

<input type="checkbox"/> 1 - 24 ^A	<input type="checkbox"/> 100 - 249 ^D
<input type="checkbox"/> 25 - 49 ^B	<input type="checkbox"/> 250 - 499 ^E
<input type="checkbox"/> 50 - 99 ^C	<input type="checkbox"/> 500 + ^F
- Which of the following best describes your firm's growth or decline in revenue and staff over the past three years? (check one)
 - Fast growth (average annual growth of 20% or more) ^A
 - Slow growth (average 1% - 19% annual growth) ^B
 - Stable (unchanged for three years) ^C
 - Slow decline (average annual decline of 1% - 9%) ^D
 - Fast decline (average annual decline of 10% or more) ^E

- Which of the following best describes your firm's annual net pre-tax, pre-bonus profit over the past three years? (check one)
 - Very high profit (15.0% or more) ^A
 - High profit (10.0% - 14.9%) ^B
 - Average profit (5.0% - 9.9%) ^C
 - Low profit/loss (4.9% or less) ^D

Branch Office Background

- In what state is your office located? _____
- How many people are currently employed by your branch office? (full-time equivalent; administrative personnel includes anyone who is generally non-billable (including management); do NOT include those on loan)

Technical/professional	_____
Administrative	_____
Total	_____
- Which of the following staff size categories does your office fall into?

<input type="checkbox"/> 1 - 9 ^A	<input type="checkbox"/> 20 - 49 ^C
<input type="checkbox"/> 10 - 19 ^B	<input type="checkbox"/> 50 + ^D

Firm Organization

10. Does your firm have regional managers who oversee a group of branch offices?

- Yes ^A No (skip to #13) ^B

11. If so, how many regional managers across the firm? _____

12. On average, how many offices does each regional manager supervise? _____

13. How would you rate the overall services provided by the headquarters office in each of the following areas? How vital is it that headquarters provides these services?

To rate quality: 5 = Superior, 1 = Worthless

To rate importance: 5 = Extremely important, 1 = Not important at all

	Rate quality	Rate importance
Human resources	_____	_____
Marketing/business development	_____	_____
Information technology	_____	_____
Technical support	_____	_____
Finance and accounting	_____	_____
Legal	_____	_____
Library	_____	_____

14. Which of the following specific services do you receive from the headquarters office? (Check all that apply. Rate only those you receive. 5 = Superior, 1 = Worthless)

- Financial accounting/reports ^A _____
- Project/job cost accounting/reports ^B _____
- Invoicing ^C _____
- Payment of payables ^D _____
- Collection assistance ^E _____
- Payroll ^F _____
- Equipment leasing ^G _____
- Contract review ^H _____
- Technical/engineering analysis ^I _____
- General computer services ^J _____
- Proposal/qualification document preparation ^K _____
- Proposal/qualification document building blocks (actual proposal put together in branch office) ^L _____
- Recruitment & interviewing ^M _____
- Training/seminars ^N _____
- Office leasing ^O _____
- Other _____ ^P _____

15. On average, how many times per year do you visit the headquarters office? (if never, put "0") _____

16. On average, how many times per year does a management representative from the headquarters office visit your office? (if never, put "0") _____

17. On average, how many times per year does your firm's president/CEO visit your office? (if never, put "0") _____

18. What could headquarters do to better communicate corporate goals? (check all that apply)

- Be visible in branch offices on a regular basis ^A
- Define objectives ^B
- Direct meetings ^C
- Develop branch annual budgets with branch management ^D
- Post the strategic plan on the intranet ^E
- Involve branches in planning and goal setting ^F
- Maintain communication with branches and follow up on strategic goals ^G
- Other _____ ^H

19. Does your firm recognize/celebrate the successes (e.g., financial, sales, project) of your office? (check all that apply)

- Yes, successes are recognized in the firm's newsletter/on the intranet/via e-mail ^A
- Yes, headquarters provides a celebration at our branch ^B
- Yes, at yearly retreats offices are recognized and/or rewarded ^C
- Yes, in company/office meetings ^D
- Yes, other _____ ^E
- No ^F

20. Does your firm conduct retreats or provide opportunities for branch offices to get together?

- Yes, all offices, including international ^A
- Yes, all offices nationally ^B
- Yes, but only regionally ^C
- Yes, other _____ ^D
- No (skip to #23) ^E

21. If so, are these retreats useful? Why or why not?

- Yes, they are useful because _____ ^A
- No, they are not useful because _____ ^B

22. If your firm conducts retreats for branch offices to get together, which employees are invited to attend? (check all that apply)

- All firm members ^A
- Pres/CEO/managing partner ^B
- Vice presidents/principals ^C
- Associates/sr. associates ^D
- Branch office managers ^E
- Department heads ^F
- Project managers ^G
- Professional/technical staff ^H
- Secretarial/clerical staff ^I
- Other _____ ^J

Branch Office Management

23. Approximately how many miles is your branch office from your firm's headquarters office? (give mileage "as the crow flies") _____ miles
24. Approximately how large is your office? _____ square feet
25. What is the annual cost per square foot of your office? (rent, utilities, maintenance, and office's share of taxes, if any) \$ _____ per square foot
26. What role do you play in office leasing arrangements? (check all that apply)
- Set criteria for cost and size ^A Sole responsibility for decision ^E
 Search for/view office space ^B Other _____ ^F
 Negotiate lease terms ^C None of the above ^G
 Sign lease ^D
27. What is the primary barrier to sharing work on a project among staff from multiple offices? (check one)
- Lack of communication ^A Distance between offices ^E
 Compensation issues ^B Staffing/resources ^F
 Poor working relationships ^C Scheduling ^G
 Financial issues ^D Other _____ ^H
28. What is the best way to facilitate sharing work on a project among staff from multiple offices? (check one)
- In-person interaction ^A Financial incentives ^D
 Technology ^B Clear team roles/assignments ^E
 Assigning right leaders ^C Other _____ ^F

HR Management/Recruiting

29. Does your branch office have dedicated human resources staff? If so, how many?
- Yes _____ ^A No ^B
30. Does your office do its own recruiting? (check one)
- Yes, always ^A No, handled by headquarters ^C
 Sometimes, depends on the position ^B
31. What is your firm's labor swapping policy? (check one)
- Costs and revenue follow the employee ^A
 Costs follow the employee but revenue stays at home ^B
 Revenue follows the employee but costs stay at home ^C
 Neither costs nor revenue follows the employee ^D
 Other _____ ^E

Marketing

32. Does your branch office have dedicated marketing staff? If so, how many?
- Yes _____ ^A No ^B
33. If your firm has a centralized marketing database or mailing list of past, present, and potential clients and/or friends of the firm, is it available in your branch office?
- Yes ^A No ^B N/A (no database) ^C
34. Are the following marketing tasks performed for your branch office at the headquarters level, the branch office level, neither, or both?
- | | HQ | Office | Neither |
|---|--------------------------|--------------------------|--------------------------|
| Market research ^A | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Marketing database/mailling list ^B | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Lead tracking/reporting ^C | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Sales tracking/reporting ^D | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Presentation graphics ^E | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Project lead identification ^F | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Direct mail campaign ^G | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Brochure development ^H | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Advertising ^I | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
35. Does your office sell the full range of services your firm offers?
- Yes ^A No ^B

Information Technology

36. Does your branch office have dedicated IT staff? If so, how many?
- Yes _____ ^A No ^B
37. Does your firm's IT manager visit your office on a regular basis? If so, how often?
- Yes, _____ visits on average each year to my office ^A
 No ^B
38. Does your office have any videoconferencing capabilities?
- Yes ^A No ^B

Office Financial Performance

39. Which method of accounting does your firm use? (check one)

- Office profit center accounting (all costs & revenue are tracked for each office) ^A
- Office cost center accounting (only costs are tracked for offices; revenue is attributed to principals, projects, or departments) ^B
- No accounting for individual offices (neither costs nor revenue are tracked for offices; all are tied to some other unit or person) ^C

40. Does your firm allocate corporate overhead to branch offices? (check one)

- Yes, allocate corporate overhead to branch offices ^A
- No, allocate corporate overhead to departments/divisions (skip to #43) ^B
- No, do not allocate corporate overhead (skip to #43) ^C

41. How does your firm come up with this allocation? (check one)

- Allocate as a percentage of revenue ^A
- Allocate as a percentage of total staff or labor costs ^B
- Allocate based on estimated use of corporate services ^C
- Other _____ ^D

42. What's included in the corporate overhead allocation? (check all that apply)

- Corporate salary/benefits expenses ^A
- Administrative salary/benefits expenses ^B
- Marketing expenses ^C
- IT expenses ^D
- HR expenses ^E
- Other _____ ^F

43. In 2008, what were the approximate costs for your office in each of the following areas? (not including corporate overhead allocation)

Labor	\$ _____
Benefits	\$ _____
Rent & utilities	\$ _____
Travel & entertainment	\$ _____
Office supplies	\$ _____
Other _____	\$ _____
Total costs	\$ _____

44. In 2008, what were the sales, revenue, and profit figures for your office?

Sales means the dollar volume of new projects sold and put under contract during the year for which the office received credit. If credit was split with another office, include the portion for which your office received credit.

Net service revenue (NSR) is gross revenue generated for the office during the year, minus payments to subconsultants and reimbursables.

- A. Sales of new projects (\$ net service revenue) \$ _____
- B. Net service revenue \$ _____
- C. Office costs (equals total from #43) \$ _____
- D. Profit (before overhead allocation, if any) (B-C) \$ _____
- E. Overhead allocation, if any \$ _____
- F. Profit (after overhead allocation, if any) (D-E) \$ _____

45. What percentage of your firm's gross revenue comes from your branch office? _____%

46. Does your office have a raw labor target multiplier? If so, what is it? (multiplier = net service revenue divided by direct (raw) labor costs)

- Yes, _____ ^A No ^B

47. What was the actual average net multiplier for your office in 2008? _____

48. Does your office have a utilization rate (chargeability) goal? If so, what is it? (utilization rate = direct labor dollars divided by total labor dollars)

- Yes, _____% ^A No ^B

49. What was the actual average utilization rate for your office in 2008? _____%

50. Are headquarters' expectations for branch office performance adjusted according to their size, local climate, and work?

- Yes, each office's characteristics are taken into account ^A
- No, each branch office is measured equally ^B

Office Manager Background

51. How old are you?

- 20 - 29 ^A 50 - 59 ^D
- 30 - 39 ^B 60 + ^E
- 40 - 49 ^C

52. What is your gender?

- Male ^A Female ^B

53. Which of the following degrees have you earned? (check all that apply)
- Associate's degree ^A Ph.D. ^E
 4-yr. bachelor's degree ^B Other _____ ^F
 5-yr. professional degree ^C No college-level degree ^G
 Master's degree/MBA ^D
54. Have you had any college-level business education? (check all that apply)
- Graduate business degree ^A
 Undergraduate business degree ^B
 Some course work toward degree ^C
 Some course work not for degree credit ^D
 No college-level business course work ^E
55. Are you a registered technical professional? (engineer, architect, planner, land surveyor, etc.)
- Yes ^A No ^B
56. Which of the following best describes your own profession? (based on your education, registration, and work experience; check one)
- Architect ^A Surveyor ^F
 Interior designer ^B Scientist (e.g., geologist) ^G
 Engineer ^C Business professional ^H
 Planner ^D Other _____ ^I
 Landscape architect ^E
57. How many professional associations do you belong to? _____
58. How many of these professional association memberships does your firm pay for? _____
59. How many total years of experience do you have in the design and environmental consulting industry? (include years with your current firm and with any previous design or environmental firms; check one)
- 0 - 9 years ^A 20 - 29 years ^C
 10 - 19 years ^B 30 years or more ^D
60. How many years have you worked for this firm? _____ years
61. How many years have you worked in this office? _____ years
62. How many years have you been the manager of this office? _____ years
63. What is the title of the person to whom you report? (check one)
- Pres/CEO/managing partner ^A Principal/vice president ^D
 CFO ^B Regional manager ^E
 COO ^C Other _____ ^F
64. Have you signed a non-compete agreement that prohibits you from competing for any of your firm's current or prospective clients in the event you should leave your firm?
- Yes ^A No (skip to #66) ^B
65. If so, for how long after you leave your firm is it in effect? _____ years
66. Have you received training in any of the following areas? (check all that apply)
- Hiring staff ^A Business development ^E
 Managing staff ^B Information technology ^F
 Balancing responsibilities ^C Other _____ ^G
 Financial management ^D None of the above ^H
67. Do you feel you've received adequate training to allow you to manage your branch office successfully? Why or why not?
- Yes _____

 _____ ^A
 No _____

 _____ ^B

Office Manager Responsibilities

68. Do you sit on your firm's board of directors?
- Yes ^A No ^B
69. Do you participate in your firm's business planning process?
- Yes ^A No ^B
70. How many hours per week do you work on average? _____ hours
71. Do you also act as project manager on client projects? If so, how many jobs are you currently managing?
- Yes _____ ^A No ^B
72. What percentage of your time do you spend on each of the following activities? (should total 100%)
- _____ % Design/technical activities
 _____ % Marketing/business development
 _____ % Project management
 _____ % Office management (including financial management)
 _____ % Leadership/mentoring activities
 _____ % Other _____

73. Ideally, how would you break down your work day? (should total 100%)
- _____ % Design/technical activities
 _____ % Marketing/business development
 _____ % Project management
 _____ % Office management (including financial management)
 _____ % Leadership/mentoring activities
 _____ % Other _____
74. What percentage of your time is job-chargeable? (based on 40 hours/week) _____ %
75. What is your hourly billing rate? (if more than one, give the average rate you actually bill to clients) \$_____ per hour


Office Manager Compensation

76. Are you an owner in your firm? If so, what percentage of the firm's stock do you own?
- Yes, _____ % ^A No ^B
77. What is your current annual base salary? (excluding fringe benefits, bonuses, profit distributions, and overtime compensation, if applicable)
 \$ _____
78. Did you receive a non-shareholder bonus or profit distribution in 2008? If so, how much?
- Yes, \$ _____ ^A No ^B
79. Are you entitled to overtime pay for hours worked over 40? If so, how much overtime pay did you receive in 2008?
- Yes, \$ _____ ^A No ^B
80. Does your firm provide you with a vehicle?
- Yes (skip to #83) ^A No ^B
81. If you do not have a company vehicle, do you receive an auto allowance?
- Yes ^A No (skip to #83) ^B
82. If so, how much is it? \$ _____ per month (NOT per mile)
83. Does your firm provide you with a cellular phone?
- Yes ^A No (skip to #85) ^B
84. If so, what does your firm pay for? (check all that apply)
- Actual phone ^A Billable calls ^C
 Base monthly fees ^B Non-billable/personal calls ^D

Opinions

85. In your opinion, which of the following is the most important trait for a branch office manager? (check one)
- Strong marketing skills ^A Thinks like an entrepreneur ^D
 Knows the territory ^B Other _____ ^E
 Financial skills ^C
86. If your office was not a part of your firm, would the office..? (check one)
- Thrive ^A Survive, but not thrive ^B Fail ^C
87. What could headquarters do to improve your branch office? (check all that apply)
- Provide additional staff ^A
 Assist with marketing and business development ^B
 Provide better staff training ^C
 Provide better technology support ^D
 Other _____ ^E
88. In general, what do you think is the key to success of any branch office? _____

89. In general, what do you think is the reason for failure of any branch office? _____

 **THANK YOU!** Please return your completed questionnaire and optional order form by July 3, 2009, to ZweigWhite, 321 Commonwealth Road, Suite 101, Wayland, MA 01778. Note: the order form is required if you would like to receive your complimentary executive summary.

Do you have any comments or suggestions that would help us improve the questionnaire? _____

2009 Branch Office Management Survey of A/E/P & Environmental Consulting Firms

TO ORDER: To receive your complimentary copy of the executive summary, or the survey results at the participants' discount price, complete and return this form, along with a completed questionnaire. This offer expires July 3, 2009. **If you mark the second choice below, your order must be paid before the results are e-mailed (August 2009).**

- YES**, I have enclosed my completed questionnaire and would like to receive the free executive summary! *(available only to survey participants)*
- YES**, I have enclosed my completed questionnaire and would like to receive the full survey results at the pre-publication price for participants— **\$45** (a \$195 value).
- NO**, I did not complete the questionnaire, but would still like to receive the full survey results at the price for non-participants— **\$195**.

Please total your order:	
2009 Branch Office Management Survey— \$0 executive summary; \$45 full results for participants; \$195 full results for non-participants	\$
Sales tax (required for: MA 5%, IL 6.25%, DC 5.75%)	\$
TOTAL	\$

As a branch office manager, you know you have a lot to manage. But you're not alone— in fact, research shows that in addition to office management responsibilities such as finance and operations duties, branch office managers are also typically responsible for marketing and business development tasks, project management roles, and design and technical work. How do they get it all done, and what are they paid for it? **ZweigWhite's 2009 Branch Office Management Survey of Architecture, Engineering, Planning & Environmental Consulting Firms**, the only source of information dedicated to A/E firm branch office management, will help you answer these questions.



PAYMENT METHOD (not required for the executive summary):

- Charge my: VISA MasterCard American Express

CARDHOLDER _____ CARD# _____
EXPIRATION DATE _____ SIGNATURE _____

- My check is enclosed.

- Please bill my firm.

PO#: _____ (optional)

Orders for survey participants (\$45 option) must be paid before the survey results are e-mailed.

Please make a copy of this order form for your own records.

CONTACT INFORMATION:

NAME _____ TITLE _____
FIRM _____ STAFF SIZE _____
STREET _____
CITY _____ STATE _____ ZIP _____
PHONE _____ E-MAIL (required, electronic report) _____

RETURN TO: ZweigWhite
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