

# 2010 Project Management Survey

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of Architecture,  
Engineering, Planning &  
Environmental Consulting Firms

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**Confidential Questionnaire:** Must be completed and returned by May 4, 2010.

**Stop!** Are you a president, CEO, CFO, or COO 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 save \$350 off the regular price of the survey report by completing this questionnaire! See the order form at the end of the questionnaire for more information.



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## Please read before beginning

ZweigWhite is conducting a comprehensive and unique study of project 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 your firm as a participant.**

The questions are not difficult; it should take less than an hour to complete the questionnaire. If you need assistance with any of the questions, or would like more information, contact Margot Suydam at (800) 466-6275 x238 or [msuydam@zweigwhite.com](mailto:msuydam@zweigwhite.com).

To receive your survey report at the participants' discount, 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 May 4, 2010 to:

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## Firm Background

- Which of the following best describes your firm overall?  
(check one)
  - Architecture or Interiors <sup>A</sup>
  - A/E (primarily architecture) <sup>B</sup>
  - Single-discipline Engineering <sup>C</sup>
  - Multidiscipline Engineering (two or more disciplines, but not full-service) <sup>D</sup>
  - Full-service Engineering or E/A (civil, structural, mechanical, & electrical; other services may include architecture, etc.) <sup>E</sup>
  - Design/Build (more than 50% of revenue from design/build services) <sup>F</sup>
  - Environmental Consulting (engineering and/or science; enviro. focus) <sup>G</sup>
  - Other \_\_\_\_\_ <sup>H</sup>
- In what year was your firm founded?
  - 1945 or earlier <sup>A</sup>
  - 1946 - 1959 <sup>B</sup>
  - 1960 - 1969 <sup>C</sup>
  - 1970 - 1979 <sup>D</sup>
  - 1980 - 1989 <sup>E</sup>
  - 1990 - 1999 <sup>F</sup>
  - 2000 to present <sup>G</sup>
- In what state is your firm headquartered? \_\_\_\_\_
- Approximately how many employees are there firm-wide?  
(full-time equivalent in all offices; include owners who work in the firm) \_\_\_\_\_
- Which of the following staff size categories does your firm fall into? (using the number from question #4)
  - 1 - 24 <sup>A</sup>
  - 25 - 49 <sup>B</sup>
  - 50 - 99 <sup>C</sup>
  - 100 - 249 <sup>D</sup>
  - 250 - 499 <sup>E</sup>
  - 500 + <sup>F</sup>
- How many offices does your firm have? \_\_\_\_\_
- What was your firm's annual net service revenue for 2009?  
(gross revenue minus subconsultants and reimbursable expenses)  
\$ \_\_\_\_\_
- Approximately what percentage of your firm's work is performed for public vs. private clients? (should total 100%)  
\_\_\_\_\_% Public \_\_\_\_\_% Private
- Approximately how far is your client base from your firm? (if your firm has multiple offices, base answer on the distance from the closest office)
  - 25% of our client base is about \_\_\_\_\_ miles from our firm
  - 50% of our client base is about \_\_\_\_\_ miles from our firm
  - 75% of our client base is about \_\_\_\_\_ miles from our firm
  - 100% of our client base is about \_\_\_\_\_ miles from our firm
- Under what legal form of ownership is your firm organized?  
(check one)
  - Proprietorship <sup>A</sup>
  - Partnership <sup>B</sup>
  - Professional Corp. (PC) <sup>C</sup>
  - LLC <sup>D</sup>
  - Private Corp. (C-Corp) <sup>E</sup>
  - Private Corp. (S-Corp) <sup>F</sup>
  - Public Corp. <sup>G</sup>
  - Other \_\_\_\_\_ <sup>H</sup>
- If privately owned, how many owners does your firm have?  
(excluding ESOP, if any) \_\_\_\_\_
- Does your firm have an employee stock ownership plan (ESOP)? If so, what percentage of the firm's stock does it own?
  - Yes, \_\_\_\_\_% <sup>A</sup>
  - No <sup>B</sup>
- What percentage of your firm's work is performed as...?  
(should total 100%)
  - \_\_\_\_\_% Prime consultant to project owner
  - \_\_\_\_\_% Subconsultant to another design/consulting firm

14. 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) <sup>A</sup>
- Slow growth (average annual growth of 1% - 19%) <sup>B</sup>
- Stable (unchanged for three years) <sup>C</sup>
- Slow decline (average annual decline of 1% - 9%) <sup>D</sup>
- Fast decline (average annual decline of 10% or more) <sup>E</sup>
15. 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) <sup>A</sup>
- High profit (10.0% - 14.9%) <sup>B</sup>
- Average profit (5.0% - 9.9%) <sup>C</sup>
- Low profit/loss (4.9% or less) <sup>D</sup>
23. If so, how do they coordinate the assignment? (check one)
- Coordinate themselves <sup>A</sup>       A senior PM is designated <sup>D</sup>
- PIC coordinates <sup>B</sup>       Other \_\_\_\_\_ <sup>E</sup>
- Report to director of PMs <sup>C</sup>
24. Can PMs be team members on some projects and managers of others?
- Always <sup>A</sup>       Rarely <sup>C</sup>
- Sometimes <sup>B</sup>       Never <sup>D</sup>
25. Does your firm do workload/manpower planning? (check one)
- Yes, weekly <sup>A</sup>       Yes, quarterly <sup>D</sup>
- Yes, bi-weekly <sup>B</sup>       Yes, other \_\_\_\_\_ <sup>E</sup>
- Yes, monthly <sup>C</sup>       No (skip to #27) <sup>F</sup>

## Firm Organization

16. Is your firm organized by...? (check all that apply)
- Discipline/function <sup>A</sup>       Geography <sup>C</sup>
- Market sector/client type <sup>B</sup>       Other \_\_\_\_\_ <sup>D</sup>
17. How does your firm assemble teams for projects? (check one)
- Matrix (PMs reside outside depts./teams; each project has unique team) <sup>A</sup>
- Standing team/studio (permanently assigned project teams/studio) <sup>B</sup>
- Hybrid (PMs reside in discipline departments; the lead discipline is where the PM comes from; there is a unique team for each project) <sup>C</sup>
- Other \_\_\_\_\_ <sup>D</sup>
18. Approximately what percentage of your firm's 2009 gross revenue fell into each of the following project delivery categories? (should total 100%)
- \_\_\_\_\_ % Design/build      \_\_\_\_\_ % Construction management
- \_\_\_\_\_ % Design-bid-build      \_\_\_\_\_ % Other \_\_\_\_\_
19. How many project managers are there in your firm? \_\_\_\_\_
20. Does your firm have a principal-in-charge (PIC) role?
- Yes <sup>A</sup>       No (skip to #22) <sup>B</sup>
21. If so, does each project have both an assigned PIC and PM? (two different people)
- Always <sup>A</sup>       Rarely <sup>C</sup>
- Sometimes <sup>B</sup>       Never <sup>D</sup>
22. Do projects ever have more than one PM?
- Always <sup>A</sup>       Rarely <sup>C</sup>
- Sometimes <sup>B</sup>       Never (skip to #24) <sup>D</sup>
26. If so, who's involved in the process? (check all that apply)
- Pres/CEO/managing partner <sup>A</sup>       Division manager(s) <sup>E</sup>
- Vice presidents/principals <sup>B</sup>       Professional/technical staff <sup>F</sup>
- Principal-in-charge (PIC) <sup>C</sup>       HQ/branch office managers <sup>G</sup>
- Project manager(s) <sup>D</sup>       Other \_\_\_\_\_ <sup>H</sup>
27. If your firm is organized under a *matrix* or *hybrid* structure (see definitions in #17), do PMs select staff for their jobs?
- Always <sup>A</sup>       Rarely <sup>C</sup>
- Sometimes <sup>B</sup>       Never <sup>D</sup>
28. If your firm is organized under a *matrix* structure (see definition in #17), do PMs participate in performance appraisals for those who have worked on their jobs?
- Always <sup>A</sup>       Rarely <sup>C</sup>
- Sometimes <sup>B</sup>       Never <sup>D</sup>
29. Do PMs have any hiring/firing power?
- Always <sup>A</sup>       Rarely <sup>C</sup>
- Sometimes <sup>B</sup>       Never <sup>D</sup>
30. Does your firm provide any project management training? (check all that apply)
- Yes, voluntary training <sup>A</sup>       No (skip to #37) <sup>C</sup>
- Yes, mandatory training <sup>B</sup>
31. Does your firm ever provide any PM training for employees before they are promoted to the PM role?
- Always <sup>A</sup>       Rarely <sup>C</sup>
- Sometimes <sup>B</sup>       Never <sup>D</sup>
32. What type(s) of PM training does your firm provide? (check all that apply)
- On-the-job training <sup>A</sup>       Professional courses/school <sup>E</sup>
- Audio/video tapes <sup>B</sup>       Seminars/conferences <sup>F</sup>
- Webinars/online courses <sup>C</sup>       Reading materials (self-study) <sup>G</sup>
- In-house meetings/lectures <sup>D</sup>       Other \_\_\_\_\_ <sup>H</sup>

33. Does your firm have a project management manual that is provided to all project managers?
- Yes <sup>A</sup>                       No <sup>B</sup>
34. Does your firm have a mentoring program for PMs? *(check all that apply)*
- Yes, PMs receive mentoring from senior members of the firm <sup>A</sup>  
 Yes, PMs mentor potential project managers/future leaders <sup>B</sup>  
 Yes, other \_\_\_\_\_ <sup>C</sup>  
 No mentoring program for PMs <sup>D</sup>
35. What *firm-specific* PM training does your firm provide to project managers? *(check all that apply)*
- Preparation of project budgets <sup>A</sup>  
 Preparation of fee estimates <sup>B</sup>  
 Preparation of project schedules <sup>C</sup>  
 Methods of processing a project <sup>D</sup>  
 Reporting structure (*PIC, PM, team*) <sup>E</sup>  
 Who in the firm has contracting authority <sup>F</sup>  
 How to open a job number <sup>G</sup>  
 Policies on charging time to projects <sup>H</sup>  
 Contract forms— which forms are routinely used and when <sup>I</sup>  
 Invoicing procedures <sup>J</sup>  
 Project filing procedures <sup>K</sup>  
 Project close-out procedures <sup>L</sup>  
 Other \_\_\_\_\_ <sup>M</sup>
36. What *general skills* training does your firm provide to project managers? *(check all that apply)*
- Writing/designing scope <sup>A</sup>       Management <sup>M</sup>  
 Preparation of budgets <sup>B</sup>       Collection skills <sup>N</sup>  
 Preparation of fee estimates <sup>C</sup>  Client relations <sup>O</sup>  
 Preparation of schedules <sup>D</sup>       Communication <sup>P</sup>  
 Project profit/loss tracking <sup>E</sup>       Financial management <sup>Q</sup>  
 Project management software <sup>F</sup>  Risk management <sup>R</sup>  
 Project processing methods <sup>G</sup>  Supervision of personnel <sup>S</sup>  
 Leadership (motivating staff) <sup>H</sup>  Fee negotiation <sup>T</sup>  
 Listening and note-taking <sup>I</sup>       Time management <sup>U</sup>  
 Oral presentation <sup>J</sup>               Dressing appropriately <sup>V</sup>  
 Business development skills <sup>K</sup>  Other \_\_\_\_\_ <sup>W</sup>  
 Writing (*letters, memos, reports, specifications*) <sup>L</sup>
37. What is your firm's *top* training need for project managers?
- Financial management/budgeting <sup>A</sup>  
 Project management <sup>B</sup>  
 Leadership/personnel management <sup>C</sup>  
 Time management/scheduling <sup>D</sup>  
 Communications skills <sup>E</sup>  
 Client relations <sup>F</sup>  
 Marketing/business development <sup>G</sup>  
 Negotiations skills <sup>H</sup>  
 Other \_\_\_\_\_ <sup>I</sup>
38. Does your firm ever turn down work, due to a lack of manpower? *(check one)*
- Frequently <sup>A</sup>                       Rarely <sup>C</sup>  
 Occasionally <sup>B</sup>                       Never <sup>D</sup>

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## Project Administration

39. Which of the following does your firm take into account or include when creating a project budget? *(check all that apply)*
- Team members' direct salaries/billing rates <sup>A</sup>  
 Work breakdown structure (*a breakdown of every task for the project*) <sup>B</sup>  
 Allocation of time specifically for project management <sup>C</sup>  
 Estimation of labor hours for each task <sup>D</sup>  
 Calculation of direct labor costs <sup>E</sup>  
 Cost of subconsultants <sup>F</sup>  
 Estimation of reimbursable expenses <sup>G</sup>  
 Contingency allowance for unexpected costs/delays, etc. <sup>H</sup>  
 Profit as a percentage of the total budget <sup>I</sup>  
 Other \_\_\_\_\_ <sup>J</sup>
40. If your firm budgets for time spent on project management, what percentage of the total project budget is typically allocated for project management? \_\_\_\_\_%
41. What does your firm do before submitting a proposal to a potential new client? *(check all that apply)*
- Check credit rating <sup>A</sup>  
 Check files to see if proposals have been submitted to them in the past and what happened <sup>B</sup>  
 Talk to other firms that have worked for the client <sup>C</sup>  
 Meet with the client <sup>D</sup>  
 View the client's web site <sup>E</sup>  
 Other \_\_\_\_\_ <sup>F</sup>  
 Nothing <sup>G</sup>
42. If your firm checks credit ratings for new clients, how? *(check all that apply)*
- Better Business Bureau <sup>A</sup>       Dun & Bradstreet report <sup>C</sup>  
 Client's bank <sup>B</sup>                       Other \_\_\_\_\_ <sup>D</sup>
43. What must occur before a project is given a job number? *(check all that apply)*
- Establish a project budget <sup>A</sup>       Conduct credit check on client <sup>E</sup>  
 Establish a project schedule <sup>B</sup>       Obtain signed contract <sup>F</sup>  
 Establish complete billing info <sup>G</sup>  Other \_\_\_\_\_ <sup>G</sup>  
*(who, when, how much, etc.)* <sup>C</sup>       N/A (*no formal prerequisites for assigning job numbers*) <sup>H</sup>  
 Obtain formal Notice to Proceed <sup>D</sup>

44. Who has the authority to stamp and seal your firm's design documents? (check all that apply)
- Pres/CEO/managing partner <sup>A</sup>  Professional/technical staff <sup>E</sup>  
 Vice presidents/principals <sup>B</sup>  HQ/branch office managers <sup>F</sup>  
 Project manager(s) <sup>C</sup>  Other \_\_\_\_\_ <sup>G</sup>  
 Division manager(s) <sup>D</sup>
45. Approximately what percentage of the time is the person who stamps and seals design documents actually involved in the design? (0% if never, 100% if always) \_\_\_\_\_%
46. Does your firm ever hold project kick-off meetings? If so, what percentage of projects have kick-off meetings?  
 Yes \_\_\_\_\_% <sup>A</sup>  No <sup>B</sup>
47. Can all team members (including drafters, word processors, etc.) see...
- |   | Always                                | Sometimes                             | Rarely                                | Never                                 |
|---|---------------------------------------|---------------------------------------|---------------------------------------|---------------------------------------|
| ■ The <i>complete scope of services</i> for projects they're involved in?         | <input type="checkbox"/> <sup>A</sup> | <input type="checkbox"/> <sup>B</sup> | <input type="checkbox"/> <sup>C</sup> | <input type="checkbox"/> <sup>D</sup> |
| ■ Their <i>portion of the scope of services</i> for projects they're involved in? | <input type="checkbox"/> <sup>A</sup> | <input type="checkbox"/> <sup>B</sup> | <input type="checkbox"/> <sup>C</sup> | <input type="checkbox"/> <sup>D</sup> |
| ■ Their <i>portion of the project budget</i> for projects they're involved in?    | <input type="checkbox"/> <sup>A</sup> | <input type="checkbox"/> <sup>B</sup> | <input type="checkbox"/> <sup>C</sup> | <input type="checkbox"/> <sup>D</sup> |
48. Does your firm have a formal process for dealing with out-of-scope requests from clients?  
 Yes <sup>A</sup>  No (skip to #50) <sup>B</sup>
49. If so, what is it? (check all that apply)
- Formal change order for each additional service/change <sup>A</sup>  
 Blanket or "global" change order for multiple changes <sup>B</sup>  
 Adjustment in fee from client at end of each project phase <sup>C</sup>  
 Internal fee budget adjustment, but no additional fee from client <sup>D</sup>  
 Other \_\_\_\_\_ <sup>E</sup>
50. Have there been any errors and omissions judgments against your firm in the last five years?  
 Yes <sup>A</sup>  No (skip to #52) <sup>B</sup>
51. If so, what was the average amount as a percentage of the total project fee? \_\_\_\_\_% of the total project fee
52. Does your firm track project rework?  
 Yes <sup>A</sup>  No (skip to #54) <sup>B</sup>
53. If so, which of the following create the most rework for your firm? (check all that apply)
- Unclear/incorrect scope <sup>A</sup>  Team members' inexperience <sup>F</sup>  
 No fee approval for out-of-scope work <sup>B</sup>  Unmet client expectations <sup>G</sup>  
 No project planning <sup>C</sup>  Inadequate QA/QC <sup>H</sup>  
 Firm changed key staff <sup>D</sup>  Schedule slippage <sup>I</sup>  
 Overdesign <sup>E</sup>  First-time client <sup>J</sup>  
 Other \_\_\_\_\_ <sup>K</sup>
54. Does your firm send periodic project management updates to clients?  
 Yes <sup>A</sup>  No (skip to #56) <sup>B</sup>
55. If so, how often? (check one)
- Weekly <sup>A</sup>  At project milestones <sup>C</sup>  
 Monthly <sup>B</sup>  Other \_\_\_\_\_ <sup>D</sup>
56. Are PMs required to update their project financial data (including time sheets, expense reports, and expense projections) on a regular basis? If so, how often? (check one)
- Daily <sup>A</sup>  Monthly <sup>D</sup>  
 Weekly <sup>B</sup>  Other \_\_\_\_\_ <sup>E</sup>  
 Every two weeks <sup>C</sup>  No required regular updates <sup>F</sup>
57. How many non-billable activity/task codes does your firm use? \_\_\_\_\_
58. How many billable activity/task codes does your firm use? \_\_\_\_\_
59. Does your firm conduct project performance appraisals following the close of each project? (e.g., "project post-mortem")
- Always <sup>A</sup>  Rarely <sup>C</sup>  
 Sometimes <sup>B</sup>  Never (skip to #64) <sup>D</sup>
60. If *team members* are reviewed, who participates in these performance appraisals? (check all that apply)
- Pres/CEO/managing partner <sup>A</sup>  Other team members <sup>F</sup>  
 Principal-in-charge (PIC) <sup>B</sup>  Project owner/client <sup>G</sup>  
 CFO <sup>C</sup>  Other \_\_\_\_\_ <sup>H</sup>  
 Project manager <sup>D</sup>  N/A (members are not reviewed) <sup>I</sup>  
 Division manager <sup>E</sup>
61. If the *project manager* is reviewed, who participates in these performance appraisals? (check all that apply)
- Pres/CEO/managing partner <sup>A</sup>  Team members <sup>F</sup>  
 Principal-in-charge (PIC) <sup>B</sup>  Project owner/client <sup>G</sup>  
 CFO <sup>C</sup>  Other \_\_\_\_\_ <sup>H</sup>  
 Other project manager(s) <sup>D</sup>  N/A (PM is not reviewed) <sup>I</sup>  
 Division manager <sup>E</sup>

62. If the *principal-in-charge* is reviewed, who participates in these performance appraisals? (check all that apply)
- Pres/CEO/managing partner <sup>A</sup>  Team members <sup>E</sup>  
 CFO <sup>B</sup>  Project owner/client <sup>F</sup>  
 Project manager <sup>C</sup>  Other \_\_\_\_\_ <sup>G</sup>  
 Division manager <sup>D</sup>  N/A (PIC is not reviewed) <sup>H</sup>
63. What is done with the results of the performance appraisal? (check all that apply)
- Salary adjustments <sup>A</sup>  Change in procedures <sup>E</sup>  
 Bonus adjustments <sup>B</sup>  Change in firm policy <sup>F</sup>  
 Promotions for individuals <sup>C</sup>  Other \_\_\_\_\_ <sup>G</sup>  
 Used by marketing dept. <sup>D</sup>  Nothing <sup>H</sup>
64. Does your firm have a project close-out process? (check all that apply)
- Yes, a close-out checklist <sup>A</sup>  Yes, other \_\_\_\_\_ <sup>C</sup>  
 Yes, a project team meeting <sup>B</sup>  No <sup>D</sup>
65. Does your firm have a method or process to solicit *ongoing* client feedback regarding the firm's performance?
- Yes <sup>A</sup>  No (skip to #68) <sup>B</sup>
66. If so, how does your firm solicit feedback? (check all that apply)
- Written questionnaires <sup>A</sup>  Phone calls <sup>D</sup>  
 E-mails <sup>B</sup>  Meetings <sup>E</sup>  
 Online form through web site <sup>C</sup>  Other \_\_\_\_\_ <sup>F</sup>
67. Who sees this feedback? (check all that apply)
- All firm members <sup>A</sup>  Project managers <sup>F</sup>  
 Pres/CEO/managing partner <sup>B</sup>  Professional/technical staff <sup>G</sup>  
 Vice presidents/principals <sup>C</sup>  Secretarial/clerical staff <sup>H</sup>  
 Associates/sr. associates <sup>D</sup>  Other \_\_\_\_\_ <sup>I</sup>  
 Department heads <sup>E</sup>
70. If so, is the software used for...? (check all that apply)
- Budgeting <sup>A</sup>  QA/QC <sup>E</sup>  
 Scheduling/planning <sup>B</sup>  Tracking <sup>F</sup>  
 Staff planning <sup>C</sup>  Document management <sup>G</sup>  
 Billing <sup>D</sup>  Other \_\_\_\_\_ <sup>H</sup>
71. Which of the following applications are currently being used in your firm for *project management* purposes? (check all that apply)
- ArchAdministrator (PS Software Solutions) <sup>A</sup>  
 ArchiOffice (ArchiOffice) <sup>B</sup>  
 Financial Management System (Wind2 Software) <sup>C</sup>  
 Management Information System (BST Consultants) <sup>D</sup>  
 MS Excel (Microsoft Corporation) <sup>E</sup>  
 MS Project (Microsoft Corporation) <sup>F</sup>  
 Primavera (Primavera Systems) <sup>G</sup>  
 Sema4 (Deltek Systems) <sup>H</sup>  
 SureTrak (Primavera Systems) <sup>I</sup>  
 Vision (Deltek) <sup>J</sup>  
 Other \_\_\_\_\_ <sup>K</sup>  
 Custom/in-house program <sup>L</sup>
72. Who has access to make changes to projects in these applications? (check all that apply)
- All firm members <sup>A</sup>  Project team members <sup>E</sup>  
 Pres/CEO/managing partner <sup>B</sup>  Accounting staff <sup>F</sup>  
 Principal-in-charge <sup>C</sup>  Professional/technical staff <sup>G</sup>  
 Project managers <sup>D</sup>  Other \_\_\_\_\_ <sup>H</sup>
73. Has your firm ever used a project web site? (a central, web-based work space to store, share, and/or edit project information)
- Yes <sup>A</sup>  No (skip to #80) <sup>B</sup>
74. How does your firm typically charge for creating and maintaining project web sites? (check one)
- At cost <sup>A</sup>  Marked up, \_\_\_\_\_% <sup>C</sup>  
 Included in project fee <sup>B</sup>  Do not charge <sup>D</sup>
75. Approximately how much does each project web site cost as a percentage of the total project budget? \_\_\_\_\_%
76. Who can typically access your firm's project web sites? (check all that apply)
- All employees from your firm <sup>A</sup>  
 Only employees from your firm on the project team <sup>B</sup>  
 Other design firms working on the project <sup>C</sup>  
 Contractor <sup>D</sup>  
 Client(s)/owner(s) <sup>E</sup>  
 General public <sup>F</sup>  
 Other \_\_\_\_\_ <sup>G</sup>

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## Project Management Systems

68. What kind(s) of scheduling system(s) or method(s) do your firm's PMs use? (check all that apply)
- PERT charts <sup>A</sup>  Critical date schedules <sup>E</sup>  
 Gantt charts <sup>B</sup>  Milestone schedules <sup>F</sup>  
 Critical Path Method (CPM) <sup>C</sup>  Other \_\_\_\_\_ <sup>G</sup>  
 Network diagrams <sup>D</sup>  None of the above <sup>H</sup>
69. Does your firm use any project management software? (separate from your accounting software)
- Yes <sup>A</sup>  No (skip to #73) <sup>B</sup>

77. Are project web sites usually accessible by team members and contractors in the field?

- Yes <sup>A</sup>  No <sup>B</sup>

78. Which of the following can team members usually do via the project web sites your firm uses? (check all that apply)

- Communicate electronically <sup>A</sup>  Submit change orders <sup>F</sup>  
 Hold online conferences <sup>B</sup>  View/edit sketches <sup>G</sup>  
 Review/update schedules <sup>C</sup>  View/edit design documents <sup>H</sup>  
 Review/submit RFIs <sup>D</sup>  Other \_\_\_\_\_ <sup>I</sup>  
 Review/submit RFPs <sup>E</sup>

79. How effective do you think project web sites are as a project management tool? (check one)

- Extremely effective <sup>A</sup>  Not very effective <sup>C</sup>  
 Somewhat effective <sup>B</sup>  Not effective at all <sup>D</sup>

## PM Background

80. Does your firm have any formal requirements to be a PM?

- Yes <sup>A</sup>  No (skip to #82) <sup>B</sup>

81. If so, what are they? (check all that apply)

- Education/degree minimum (e.g., 4-yr. bachelor's degree) <sup>A</sup>  
 Professional license/registration <sup>B</sup>  
 PM certification (PMP, CAPM, etc.) (see #82) <sup>C</sup>  
 Technical ability <sup>D</sup>  
 Years of service with firm (\_\_\_\_ years) <sup>E</sup>  
 Total years of professional experience (\_\_\_\_ years) <sup>F</sup>  
 Minimum stock purchase (\_\_\_\_%) <sup>G</sup>  
 Sales/marketing ability (\$\_\_\_\_\_/year) <sup>H</sup>  
 Vote by BOD, executive committee, etc. <sup>I</sup>  
 Completion of in-house PM training program <sup>J</sup>  
 Other \_\_\_\_\_ <sup>K</sup>

82. Which of the following project management certifications does your firm require project managers to have? (separate from professional registration and academic degrees; check all that apply)

- Project Management Professional (PMP) <sup>A</sup>  
 Certified Associate in Project Management (CAPM) <sup>B</sup>  
 Master Project Manager <sup>C</sup>  
 Certified International Project Manager <sup>D</sup>  
 Master's Certificate in Project Management <sup>E</sup>  
 Master of Science in Project Management (MSPM)/Master in Project Management (MPM) <sup>F</sup>  
 IPMA (Levels of certification: IPMA-A, IPMA-B, IPMA-C, and IPMA-D) <sup>G</sup>  
 Other \_\_\_\_\_ <sup>H</sup>  
 None (skip to #85) <sup>I</sup>

83. Does your firm pay for any PM certification costs? (check all that apply)

- Preparatory classes <sup>A</sup>  Other \_\_\_\_\_ <sup>D</sup>  
 Exam fees <sup>B</sup>  No <sup>E</sup>  
 Paid leave for taking exams <sup>C</sup>

84. Does your firm pay for any certification fees? (check all that apply; fill in blank if appropriate; note: this is separate from professional registration)

- Yes, an unlimited number of certifications <sup>A</sup>  
 Yes, up to \_\_\_\_\_ certifications per employee <sup>B</sup>  
 Yes, other \_\_\_\_\_ <sup>C</sup>  
 No <sup>D</sup>

## Business Development

85. Who leads presentations to get new work? (check all that apply)

- Pres/CEO/managing partner <sup>A</sup>  Marketing director <sup>D</sup>  
 Principal-in-charge (PIC) <sup>B</sup>  Business developer/sales director <sup>E</sup>  
 Project manager <sup>C</sup>  Other \_\_\_\_\_ <sup>F</sup>

86. Who is responsible for negotiating the project contract? (check all that apply)

- Pres/CEO/managing partner <sup>A</sup>  Project manager <sup>D</sup>  
 Principal-in-charge (PIC) <sup>B</sup>  Other \_\_\_\_\_ <sup>E</sup>  
 Other principal(s) <sup>C</sup>

87. Are PMs responsible for pursuing additional services beyond the initial project scope?

- Always <sup>A</sup>  Rarely <sup>C</sup>  
 Sometimes <sup>B</sup>  Never <sup>D</sup>

88. Does your firm track sales by PM?

- Always <sup>A</sup>  Rarely <sup>C</sup>  
 Sometimes <sup>B</sup>  Never (skip to #92) <sup>D</sup>

89. If so, do PMs have annual sales goals they have to hit?

- Yes, \$\_\_\_\_\_/yr/PM <sup>A</sup>  No <sup>B</sup>

90. Are PMs ever eligible for a commission based on the amount of work they sell?

- Always <sup>A</sup>  Rarely <sup>C</sup>  
 Sometimes <sup>B</sup>  Never (skip to #92) <sup>D</sup>

91. If so, how are these commissions determined? (check one)

- Percentage of revenue <sup>A</sup>  Flat "finder's" fee <sup>C</sup>  
 Percentage of profits <sup>B</sup>  Other \_\_\_\_\_ <sup>D</sup>

please continue on the back with #92 ↩

92. What types of business development training does your firm provide to project managers? (check all that apply)

- Customer service/sales calls <sup>A</sup>
- Client relations <sup>B</sup>
- Writing (letters, memos, reports, specifications) <sup>C</sup>
- Listening and note-taking <sup>D</sup>
- Oral presentations <sup>E</sup>
- Communication <sup>F</sup>
- Other \_\_\_\_\_ <sup>G</sup>

93. Which of the following employees make visits to prospective clients? (check all that apply)

- Pres/CEO/managing partner <sup>A</sup>
- Marketing/sales staff <sup>D</sup>
- Principal-in-charge (PIC) <sup>B</sup>
- Professional/technical staff <sup>E</sup>
- Project manager <sup>C</sup>
- Other \_\_\_\_\_ <sup>F</sup>

94. Does your firm keep track of new clients versus clients you've previously worked for?

- Yes <sup>A</sup>
- No (skip to #96) <sup>B</sup>

95. If so, how much of your firm's 2009 gross revenue came from new versus repeat clients? (should total 100%)

New clients \_\_\_\_\_% Repeat clients \_\_\_\_\_%

96. Do project managers do any of the following to follow up with past clients? (check all that apply)

- Client feedback survey <sup>A</sup>
- Send gift cards/thank-you notes <sup>B</sup>
- Ask for letters of recommendation/testimonials <sup>C</sup>
- Discuss future leads <sup>D</sup>
- Invite to open houses/client-oriented events <sup>E</sup>
- Other \_\_\_\_\_ <sup>F</sup>
- None of the above/don't follow up with past clients <sup>G</sup>

## PM Responsibilities

97. Does your firm have a formal "Project Manager" title?

- Yes <sup>A</sup>
- No <sup>B</sup>

98. Do PMs participate in writing or designing the project scope?

- Always <sup>A</sup>
- Rarely <sup>C</sup>
- Sometimes <sup>B</sup>
- Never <sup>D</sup>

99. Are PMs responsible for...

- |                                   | Always                     | Sometimes                  | Rarely                     | Never                      |
|-----------------------------------|----------------------------|----------------------------|----------------------------|----------------------------|
| ■ Establishing project schedules? | <input type="checkbox"/> A | <input type="checkbox"/> B | <input type="checkbox"/> C | <input type="checkbox"/> D |
| ■ Establishing project budgets?   | <input type="checkbox"/> A | <input type="checkbox"/> B | <input type="checkbox"/> C | <input type="checkbox"/> D |

100. Do PMs face any direct ramifications for *not*...

- |                                      | Always                     | Sometimes                  | Rarely                     | Never                      |
|--------------------------------------|----------------------------|----------------------------|----------------------------|----------------------------|
| ■ Meeting project schedules?         | <input type="checkbox"/> A | <input type="checkbox"/> B | <input type="checkbox"/> C | <input type="checkbox"/> D |
| ■ Staying within the project budget? | <input type="checkbox"/> A | <input type="checkbox"/> B | <input type="checkbox"/> C | <input type="checkbox"/> D |

101. If so, what are these ramifications? (check all that apply)

- Salary/bonus adjustment <sup>A</sup>
- Affects performance review <sup>B</sup>
- Discussion/explanation of overruns <sup>C</sup>
- Verbal or written reprimand <sup>D</sup>
- Demotion or termination <sup>E</sup>
- Complete project without compensation <sup>F</sup>
- Other \_\_\_\_\_ <sup>G</sup>

102. Are PMs responsible for Quality Assurance/Quality Control?

- Always <sup>A</sup>
- Rarely <sup>C</sup>
- Sometimes <sup>B</sup>
- Never <sup>D</sup>

103. Do PMs review invoices before they are issued?

- Always <sup>A</sup>
- Rarely <sup>C</sup>
- Sometimes <sup>B</sup>
- Never <sup>D</sup>

104. Do PMs sign invoices before they are issued?

- Always <sup>A</sup>
- Rarely <sup>C</sup>
- Sometimes <sup>B</sup>
- Never <sup>D</sup>

105. Are PMs responsible for collecting fees?


- Always <sup>A</sup>
- Rarely <sup>C</sup>
- Sometimes <sup>B</sup>
- Never <sup>D</sup>

106. If not, who is responsible? (check all that apply)

- Pres/CEO/managing partner <sup>A</sup>
- Other accounting person <sup>D</sup>
- Principal-in-charge (PIC) <sup>B</sup>
- Other \_\_\_\_\_ <sup>E</sup>
- CFO <sup>C</sup>

107. What is the most important thing your firm could do to improve project management? \_\_\_\_\_

\_\_\_\_\_

 **THANK YOU!** Please return your completed questionnaire and optional order form by May 4, 2010, to ZweigWhite, 321 Commonwealth Road, Suite 101, Wayland, MA 01778.

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

\_\_\_\_\_

# 2010 Project Management Survey of A/E/P & Environmental Consulting Firms

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