



The Growth Blueprint

How Architecture, Engineering & Consulting Firms Can Scale Smarter, Win More Work and Boost Profitability



Table of Contents

03	Introduction
04	Win more of the right business
06	Deliver successful projects
09	Control costs and cash flow to support sustainable growth
11	Create targeted goals—and measure your progress
12	Leverage technology to accelerate your growth
13	Growing with Deltek



31% of the architecture, engineering and consulting firms identified managing growth as a top challenge.

— 6th Annual Deltek Clarity UK Industry Study, 2025

INTRODUCTION

Growth is important—not just to get bigger but to get better, too. For small and mid-sized architecture, engineering and consultancy firms, growth is integral to staying competitive. But if it were easy, everyone would do it.

Administrative overload, disconnected systems, poor visibility into operations, inconsistent cash flow and project overruns can massively hinder small and mid-sized firms' ability to grow. And when you are growing, manual processes and siloed tools become bottlenecks that restrict potential.

Growth is only effective if it's sustainable, and that means you need visibility, unified systems, clear metrics to track progress and connected workflows to retain control. So, how do you achieve it all?

In this guide, we'll take you through every part of your firm's operations that contribute to real, sustainable growth. In it, you'll discover practical tips, handy checklists and technology insights. You'll also find the KPIs you should track to help you scale smarter, so you can:

- 1. Win more of the right business:**
 - Position your firm to attract the work you want
 - Master the art of successful proposals
- 2. Deliver successful projects:**
 - Excel at resource management
 - Optimise project and service delivery
- 3. Control costs and cash flow:**
 - Take control of your finances
- 4. Create targeted goals—and measure your progress:**
 - Identify and track the right KPIs

1

Win More of the Right Business

Growing your firm might mean different things. Perhaps you want to increase your volume of projects. Maybe you want to take on more complex or multi-site projects. Or it might be both. Whatever your ambition, you need to attract the right projects to help you scale successfully.

Position your firm to attract more of the right clients

In saturated markets like architecture, engineering and consulting, standing out requires more than a portfolio of successful projects; it demands a clear, strategic approach to differentiation. Establishing your firm as a trusted partner means demonstrating how your expertise aligns with your clients' unique challenges and goals.

To truly capture attention and build trust, position your firm around specialised knowledge, market insight and client-specific value propositions. Whether it's a niche discipline, a particular project type or deep experience in a vertical market, your messaging should reflect how your firm solves the problems that matter to your clients.

Proactive business development is also key to improving your win rate. That means investing in client-specific marketing, targeted networking and relationship-building long before a potential client needs your services. When you're already on a potential client's radar as a relevant, reliable expert, you're far more likely to be invited to submit a proposal.

$$\text{Win Rate} = \text{Opportunities Won} / \text{Opportunities Pursued}$$

It is essential to track and analyse your business development efforts based on the number of projects you win. Win rate is a simple metric to calculate, but it gives firms invaluable insight.

TOP TIP

Centralising business development with an end-to-end system like Deltek ERP gives you clear visibility into your pipeline. You can spot gaps, track proposal progress, and see who's engaging with which clients. This helps teams collaborate and communicate better and positions your firm strategically before the proposal stage.

DOES YOUR PROPOSAL CONVEY EVERYTHING YOU NEED IT TO?

- Have you shown your understanding of client pain points and defined them clearly?
- Have you identified potential project challenges and explained how you'll mitigate or address them?
- Have you shown how your experience and expertise align with the opportunity?
- Have you identified areas where your team can add unique insight and value?
- Is your proposal evidenced with relevant case studies that showcase past work?
- Is your pricing transparent and justified?

Create RFP responses that get noticed—and selected

Another area that's crucial for business development is responding to RFPs (Request for Proposals).

Your ability to win work is influenced by several key factors: proposed solution, fee, schedule, track record of successful past projects and your ability to communicate exactly what your team can offer to potential clients. It's a lot to demonstrate, and with every client having different needs, goals and priorities, you need to tailor your proposals to their pain points and ambitions. But getting an appropriate, well-evidenced and compelling proposal completed in a timely manner is often a scramble.

Creating a compelling, company-branded template that you can tailor to each opportunity or pursuit and making the most of Customer Relationship Management (CRM) systems will help streamline the process. A good CRM holds key project, employee and company data, enabling you to quickly generate customised documents and focus more on the scope, schedule and fee. When every team member has access to this information, collaboration improves, and proposals become more detailed, relevant and competitive.

Making your proposal stand out from the crowd

It's a given that every RFP response must be tailored to the project and the client, but how you do that can help you stand out from the competition. Personalise your proposal and align each of your proof points to the client's challenges, goals and language. Show the client that you have done your research, you understand their specific situation and have a solution that will help them achieve their project goals.

And don't just outline what you'll do if you win the contract, show exactly why it will deliver extra value and what that value will be. Use metrics, testimonials and project success stories to back up your claims. Crucially, highlight exactly what sets you apart and why it's the exact thing the client needs.

2

Deliver Successful Projects

Delivering successful projects is reliant on multiple factors working seamlessly together. You need the right resources, in the right place, at the right time. You need to manage costs appropriately to keep work within budget. And you need to manage all of your tasks effectively to meet your deadlines and avoid mistakes. It's a lot to think about, but with good project management processes, it's more than achievable.

How to master resource management

Growth can bring more projects—and larger, more complex ones—which means a bigger pipeline and more complexity to manage. As you grow, ensuring your resource capacity can match your pipeline becomes increasingly complicated. Demand isn't usually consistent either. You'll often be in different stages of different projects and must juggle your time and resources accordingly to scale up for busy periods and adapt during quieter ones.

Proper planning and forecasting will help you avoid budget and scheduling issues, resource underutilisation and team overbooking. To properly plan, you need the right process and tools.

45%

Over 45% of the firms surveyed in a recent [Best Practices in Resource Management Webinar](#) did not have a documented resource management process in place.



When optimising your resource management process and selecting the tools you need, there are some key things to bear in mind.



Visibility:

You and your team need visibility into resource availability and utilisation. By using dashboards or visual resource management views, you can see who's booked on what, how resources align with project timelines, capacity and workload and identify resourcing gaps. Then, you can optimise resources and time without overbooking.



Forecasting:

By looking at your historical data, you can spot trends and identify areas for improvement. By reviewing how all your projects are progressing weekly, you can make necessary, proactive adjustments to your plans.



Alignment of your budgets and schedules:

Project management tools that support both resource plans and financial performance will help you spot risks early, giving you the best opportunity to mitigate them. You can see if people are sticking with their planned hours and whether budgets and costs match up. With this alignment, you can make adjustments before projects start running over, and you can better prepare for future projects, too.



Up-to-date tasks and assignments:

Dedicated resource management tools enable you to create comprehensive task lists and assign teams directly, without having to communicate with each individual team member. This also makes it easier to shift tasks, resources and schedules if client or project needs change—and keep everyone's schedules healthily filled.

The right resource planning tool should be user-friendly and full of opportunities to optimise your projects and resources to help you scale.

Optimise project and service delivery

Optimising resource planning lays the groundwork for profitable projects. And there are more ways to improve execution and profitability across the whole project lifecycle. Having more projects doesn't necessarily lead to more profitability—scope creep, change orders, poor communication and delayed billing can increase your costs and reduce your profit margins.

Increasing project visibility and efficiency will help you avoid these common pitfalls and maintain profit margins. Some streamlining strategies to put in place include:

- **Gantt charts:**

Using Gantt charts to visually map out a project's timeline, tasks and dependencies helps you plan, schedule, track progress and stay on top of progress so you can adapt schedules when necessary.

- **Time-tracking tools:**

Accurately tracking time means you know exactly how many hours you spend on specific tasks and projects, and you can compare that to your planned schedule to see where you stand. Accurately tracking the number of hours worked also helps improve billing accuracy and ensure you're paid for all the work you do.

- **Regular project reviews:**

Regularly reviewing projects enables you to identify areas where time or resources are being wasted. This improves decision-making and helps you find ways to boost profitability for both current and future projects. Plus, if you can catch issues early, you can fix them before they become huge problems.

- **Track project KPIs:**

One of the best ways to optimise project delivery over time is to track key performance indicators (KPIs) throughout the project lifecycle. Measurable benchmarks help you ensure project goals are met, identify any areas that require attention and take proactive actions to keep projects on track.

Optimising project and service delivery boosts efficiency and project margins and benefits clients. By keeping everything progressing on time and on budget, you limit frustration. Plus, being adaptive to change will give your clients the confidence to offer feedback as projects progress, so together, you can achieve exactly what they want.

KPIS TO TRACK DURING YOUR PROJECTS

- | | |
|------------------------------|--------------------------------|
| • Project profitability | • Estimate at completion (EAC) |
| • Budget variance | • Earned value |
| • Schedule variance | • Billable utilisation rate |
| • Estimate to complete (ETC) | • On-time completion |

3

Control Costs and Cash Flow to Support Sustainable Growth

Winning projects and ensuring they're profitable is fundamental to growth—but for that growth to be sustainable, your back office needs to evolve alongside your delivery teams. Even with a full pipeline, poor billing practices and delayed invoicing can lead to cash flow issues that stall progress. Aligning revenue recognition with project milestones is key to unlocking the cash needed to keep projects moving.

Dedicated financial management systems provide a comprehensive, 360-degree view of your finances, allowing you to track budgets versus actuals, forecast cash flow and manage projects in progress with confidence. By connecting time entry records, you gain full visibility and control over both project-level and company-wide financials.

How to take control of your finances

As your firm grows, manual financial processes become harder to manage and more prone to error. To stay in control, you need to eliminate manual data entry and streamline core workflows like expense tracking, invoicing, approvals and month-end close.

30%

of architecture, engineering and consulting firms identified managing cash flow as a top challenge.

— 6th Annual Deltek Clarity UK Industry Study, 2025

Investing in financial management technology helps you:

- **Automate routine tasks** to reduce errors and free up time
- **Accelerate approvals** to keep projects and payments moving
- **Track real-time financial** performance across teams and projects
- **Close the month faster** with fewer manual reconciliations
- **Scale processes** without adding complexity or overhead

With the right tools, you can forecast more accurately, maintain a steady cash flow and make confident decisions that support long-term growth.

HOW TO BOOST PROFITABILITY AND CASH FLOW

- **Track billable time accurately:** Ensure all time and expenses are captured and billed promptly to avoid revenue leakage and improve margins.
- **Invoice quickly and consistently:** Send invoices as soon as milestones are met or work is completed. Set up reminders and follow-ups to reduce payment delays.
- **Align billing with project milestones:** Structure contracts so that billing reflects project progress, helping you maintain a steady cash inflow.
- **Monitor financial performance in real time:** Use dashboards or reports to track actuals vs. budget, spot overruns early and adjust before issues escalate.
- **Streamline approvals and reduce bottlenecks:** Simplify internal workflows for expense and invoice approvals to keep cash moving and avoid delays.
- **Forecast proactively:** Use historical data and current pipeline visibility to anticipate future cash needs and plan accordingly.
- **Build a cash reserve:** Set aside funds to cover unexpected costs, delayed payments or seasonal downturns, ensuring business continuity.
- **Review and refine regularly:** Schedule monthly financial reviews to assess performance, identify inefficiencies and make informed decisions.

4 Create Targeted Goals—and Measure Your Progress

Feedback, metrics and learning from what you've done right and wrong are the only ways to build sustainable growth. Sometimes, this requires a cultural shift. Give everyone in your firm the means to share feedback and help them feel comfortable doing so. Schedule regular reviews with team leaders and encourage transparency throughout your firm. If everyone works on growth together, you can ensure no one gets left behind.

But, most importantly, use real data to verify feedback and make sure the decisions you make are data-driven. Moving from gut-feeling decisions to strategies supported by data will give you confidence that any changes you're making will have a positive impact. And by setting clear KPIs and regularly tracking them, you'll see exactly where your decisions are paying off, and where you might need to pivot.

How to track KPIs for growth

There are a variety of metrics you can track to monitor growth, each with its own benefits. But here are a few crucial ones to get you started:

- **Utilisation rate:**

The percentage of an employee's available time used for productive, billable work. Measuring utilisation rate helps you understand your charging efficiency; ensures you bill enough to cover costs and overheads and supports forecasting and resource optimisation.

- **Project margin:**

The difference between project revenue and costs. Measuring project margin is crucial in assessing project profitability. You can then build

financial performance into your wider strategy, allocate resources effectively, prioritise higher-margin projects and set appropriate pricing strategies.

- **Client satisfaction:**

How satisfied your clients are with the project journey and final results. Effectively measuring client satisfaction relies on both qualitative and quantitative metrics. Gather feedback at key project milestones, not just upon completion. Use short, targeted surveys to quickly understand sentiment at any given moment. And measure your net promoter score to quantify loyalty and track trends over time.

- **Pipeline stability:**

The outlook of your project pipeline relative to your revenue forecast. Monitoring your pipeline against your revenue forecast will enable you to understand the progress you're making towards your revenue targets in any given quarter. From there, you can make insight-driven decisions on pipeline health and your project-bidding approach.

Measuring and calculating these KPIs requires the right data. Without the right technology, tracking and gathering that data can become a hurdle. It can take up valuable time and often lead to multiple versions, which threaten accuracy.

Instead, an enterprise resource planning (ERP) solution is the most efficient way to monitor and report on your KPIs. It creates a central repository for data from all your projects for full transparency and accurate reporting.

Leverage Technology to Accelerate Your Growth

The right technology stack doesn't just support your operations—it becomes a strategic growth enabler that scales with your firm. Here's how key systems work together to drive sustainable expansion:

Streamline business development with CRM

A dedicated customer relationship management system centralises all your business development efforts, giving teams complete visibility into your opportunity pipeline, client interactions and project history. This means better collaboration between marketing, business development, and project teams; more strategic pursuit decisions and ultimately, winning the projects that align with your firm's growth objectives.

Optimise resource allocation through intelligent planning

Advanced resource planning and forecasting tools eliminate the guesswork from project staffing. By providing visibility into accurate team capacity, skills and availability, resource management and project management tools help you avoid the costly pitfalls of overbooking or underutilising your talent—ensuring every project is properly resourced for success.

Maintain financial control with project accounting

Modern financial management platforms give you complete control over your firm's financial health, and project accounting allows you to monitor performance at the project level, which is critical for project-based businesses. You can monitor project budgets against actual time and costs in real time, forecast cash flow with confidence and track project profitability throughout the lifecycle.

Drive performance with comprehensive analytics

ERP systems designed for professional services firms provide the transparency and accurate reporting you need to monitor key performance indicators and overall company performance. This data-driven approach enables informed decision-making and helps identify growth opportunities for your business.

"Growth doesn't come from one area alone. It's the result of every part of a firm working in harmony, from pipeline and project management to client relationships and financial operations. To scale effectively and sustainably, firms need a technology platform that supports the entire project lifecycle. With an Industry ERP foundation in place, firms can optimise processes leveraging AI to be at their productive best for clients, delivering an engaging employee experience and securing optimised financial performance."

— NEIL DAVIDSON | GROUP VP OF PROFESSIONAL SERVICES | DELTEK



Growing with Deltek

At Deltek, we power over 10,000 small and growing businesses with industry-specific solutions designed for every stage of the growth journey. We understand that sustainable growth requires more than good intentions—it demands the right tools, processes and partnership.

Complete project lifecycle support:

Our comprehensive technology platform supports your entire project lifecycle, from initial business development through project delivery and financial management. Whether you're looking to find and win new business, improve project planning and execution or gain better control over your finances, our solutions adapt and scale with your firm's evolving needs.

Industry expertise you can trust:

We focus relentlessly on our customers' unique challenges, creating solutions that don't just manage your business, but actively advance your success.

Ready to transform your firm's growth trajectory? Partner with Deltek and discover how the right technology foundation can accelerate your journey toward sustainable, profitable expansion.

Learn more about how Deltek solutions can power project success for your small business at

deltek.com/small-business



Better software means better projects. Deltek is the leading global provider of enterprise software and information solutions for project-based businesses. More than 30,000 organizations and millions of users in over 80 countries around the world rely on Deltek for superior levels of project intelligence, management and collaboration. Our industry-focused expertise powers project success by helping firms achieve performance that maximizes productivity and revenue. **deltek.com**

© Deltek, Inc. All rights reserved. All referenced trademarks are the property of their respective owners. REV-Dec1125 - 39773