

# Design Technology Leadership: People + Process + Profits

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**Ravi Wood**

BIM Manager – Gresham Smith | @RavClarenceWood

**Jess Purcell**

Design Technology Leader – Shepley Bulfinch | @JessiePurcey

**Ryan Cameron, AIA, EDAC**

Digital Practice Leader – CMBA Architects | @rbcameron1



# Key Learning Objectives

## KEY LEARNING OBJECTIVES

**Implement and manage Design Technology Leadership in your organization**

**Enhanced profitability and efficiency using automation and generative design**

**Design Leadership Mentoring : Serve the team with humble spirit**

**Strategies to maintain technological sanity during Covid-19**

# Gratitude and Thanks:

- Thank you to “**Autodesk University**” Team & “**Janice Miller Kellerman**” for shepherding us.
- Thank you “**David Butts**” for outstanding Mentorship!
- Thank you to our families, colleagues and Everyone part of this class for this opportunity to present our humble presentation.



# About the speaker

## Jess Purcell

- She/her
- Design Technology Manager, Shepley Bulfinch
- Multiple time speaker at BILT, AU.
- Data Analyst, Programmer, VR Mastermind, Maker
- PHX VR for Good member
- Dog mom
- Crazy plant lady



## About the speaker

### Ryan Baker Cameron, AIA

- Globally Recognized Thought Leader
- Digital Practice Leader, CMBA Architects
- Top Rated Sessions: AU14,15,17
- Speaker at RTC, BILTNA, HCD, ACBD.
- Keynote Speaker: AIA Iowa 2019 + ACBD 2019
- CEO of Architect Machines, LLC
- Book Worm





# About the speaker

## Ravi Wood

- Collaborator and Innovator.
- BIM Manager, Gresham Smith
- Top Rated class for BIM Management: AU 2019.
- Speaker at RICS IFMA Sweden 2016.
- Top Rated Speaker at Hong Kong BIM HKIBIM 2016.
- Speaker at AEC Next, NY Design Expo.

# Technology!

**Blending the right combination of people, process and profits. To get us started, The business of design is changing. You need to take it to the next level and create value that means something.**



# Our Mission Today

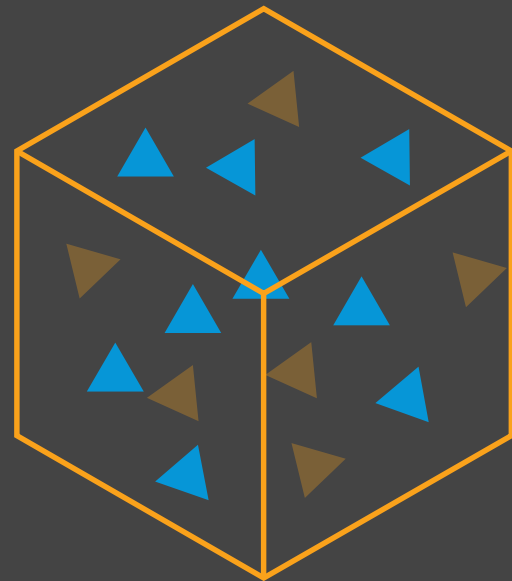
We want to help and guide **all** professionals around the world by **challenging** the status quo. We will do this by **disrupting** current business mindsets and introducing different paths for your organization to grow and expand into untapped markets.

In under an hour we want **you, the viewer** to walk away with at least one takeaway from each category as it relates to People, Processes and Profits. Ready to get started with us today? Let's go!



# The Three P's

## People



Leadership Balance that enhances employee engagement

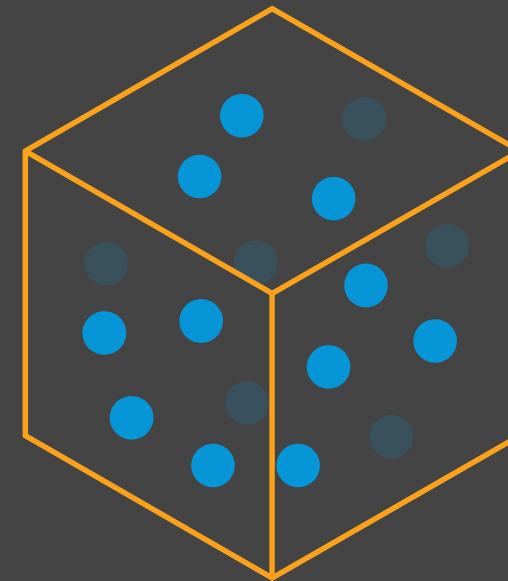


Culture + Purpose  
"Make a Better World"



Career Opportunities and Path platform in place.

## Process



Adoption/Implementation?

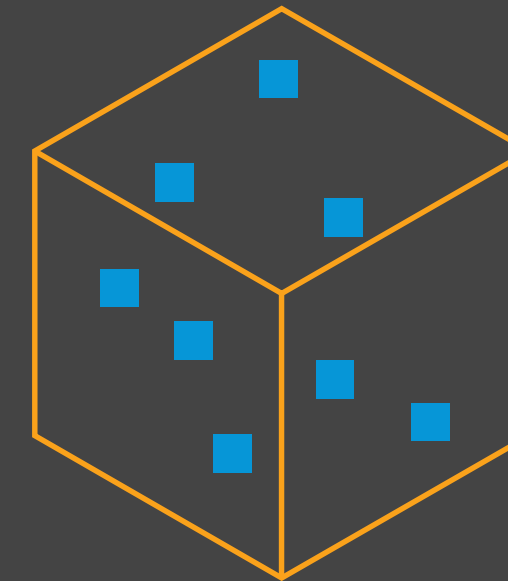


Standards



Time for Learning

## Profits



The right tools for technology staff



ROI Question

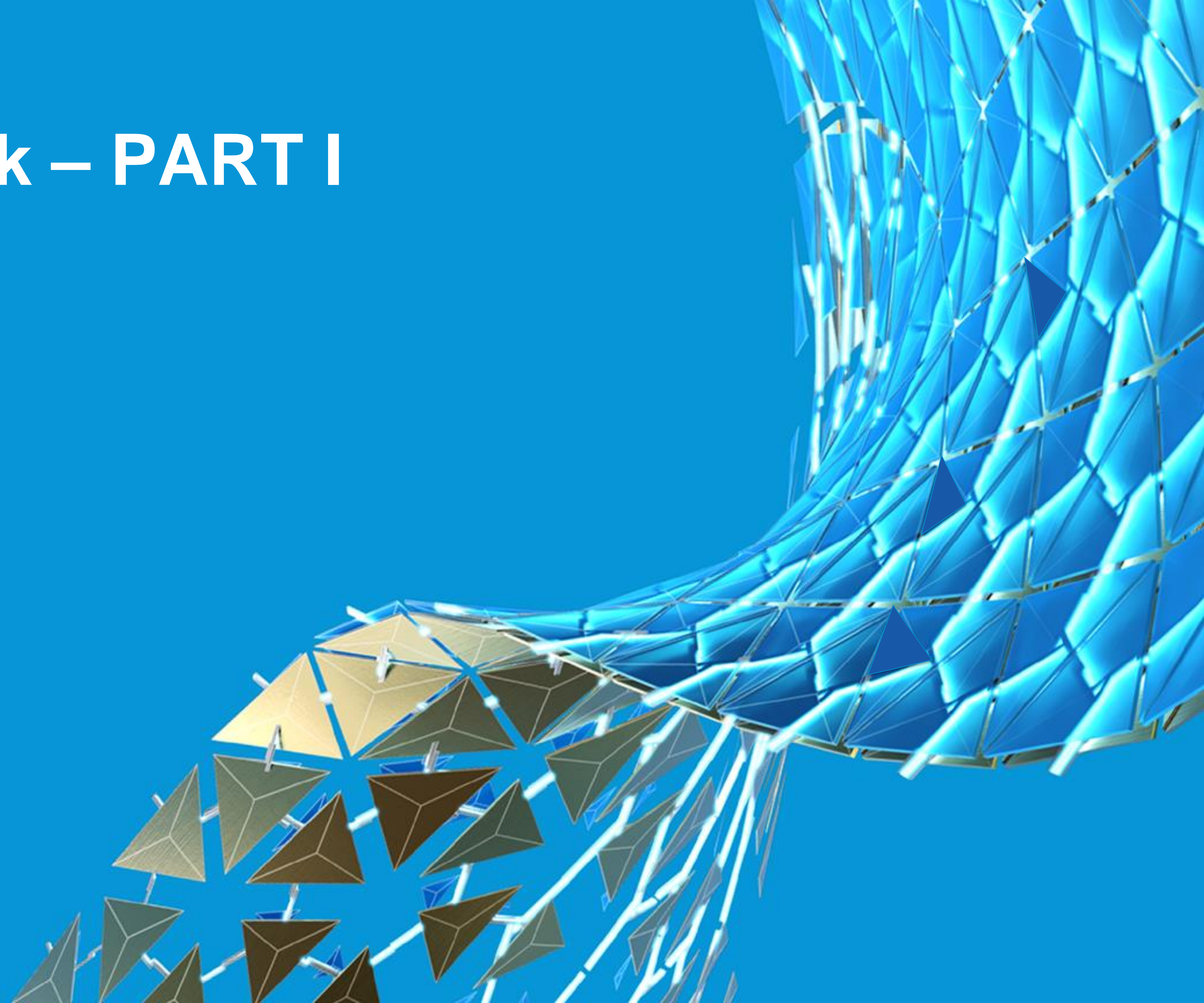


Use profits to invest in new innovation



# Section Break – PART I

## People





# Digital Technology Leadership: People

Keep things simple.

Have Empathy.

Positivity: Take Challenges as Opportunities.

Doing things “The Right Way”.

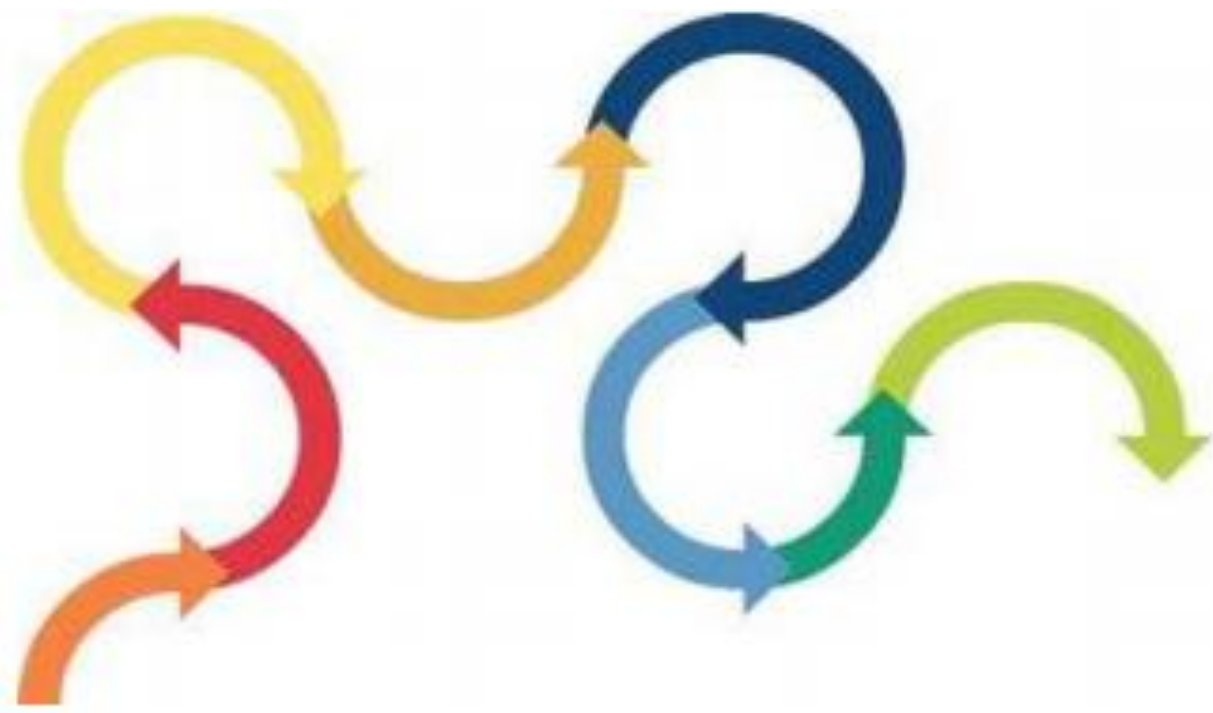
Connect the People

Connecting  
People





# 3 C's of Technology Leadership



Communicate



Collaborate



Commit

A circular progress indicator with a dashed outer ring and a solid inner ring. The inner ring is blue and covers 50% of the circle. The text "50%" is written in orange inside the white circle.

50%

Track personal development  
and engagement data

+

A circular progress indicator with a dashed outer ring and a solid inner ring. The inner ring is blue and covers 50% of the circle. The text "50%" is written in orange inside the white circle.

50%

Accurately predict outcomes  
based on decisions from data

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A circular progress indicator with a dashed outer ring and a solid inner ring. The inner ring is blue and covers 100% of the circle. The text "100%" is written in orange inside the white circle.

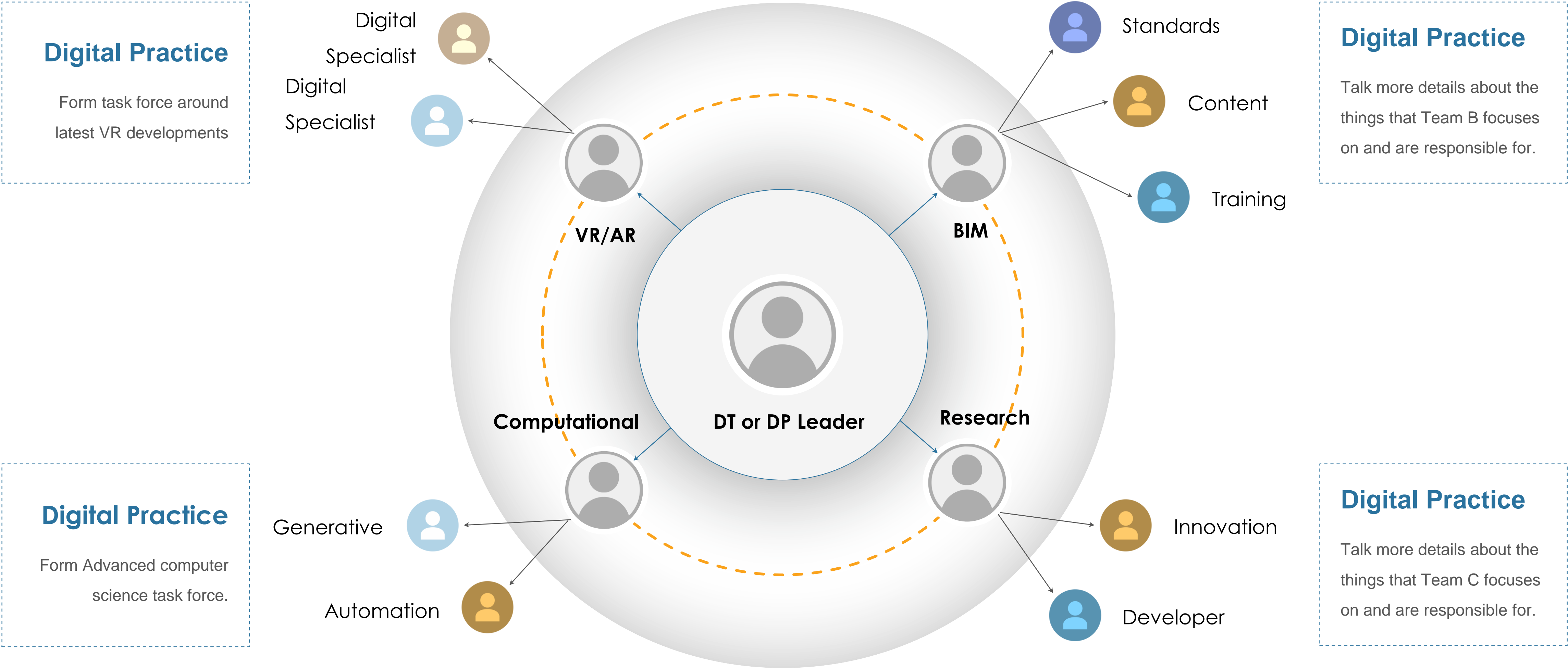
100%

Attain value metrics based on  
agreed upon outcome

# Build an explicit link between employee experience & value.

**Companies should align their people, culture, structure and tasks with one another and with the digital environment so that the team can address the constantly changing landscape.**

# Conceptual Technology Organization Chart

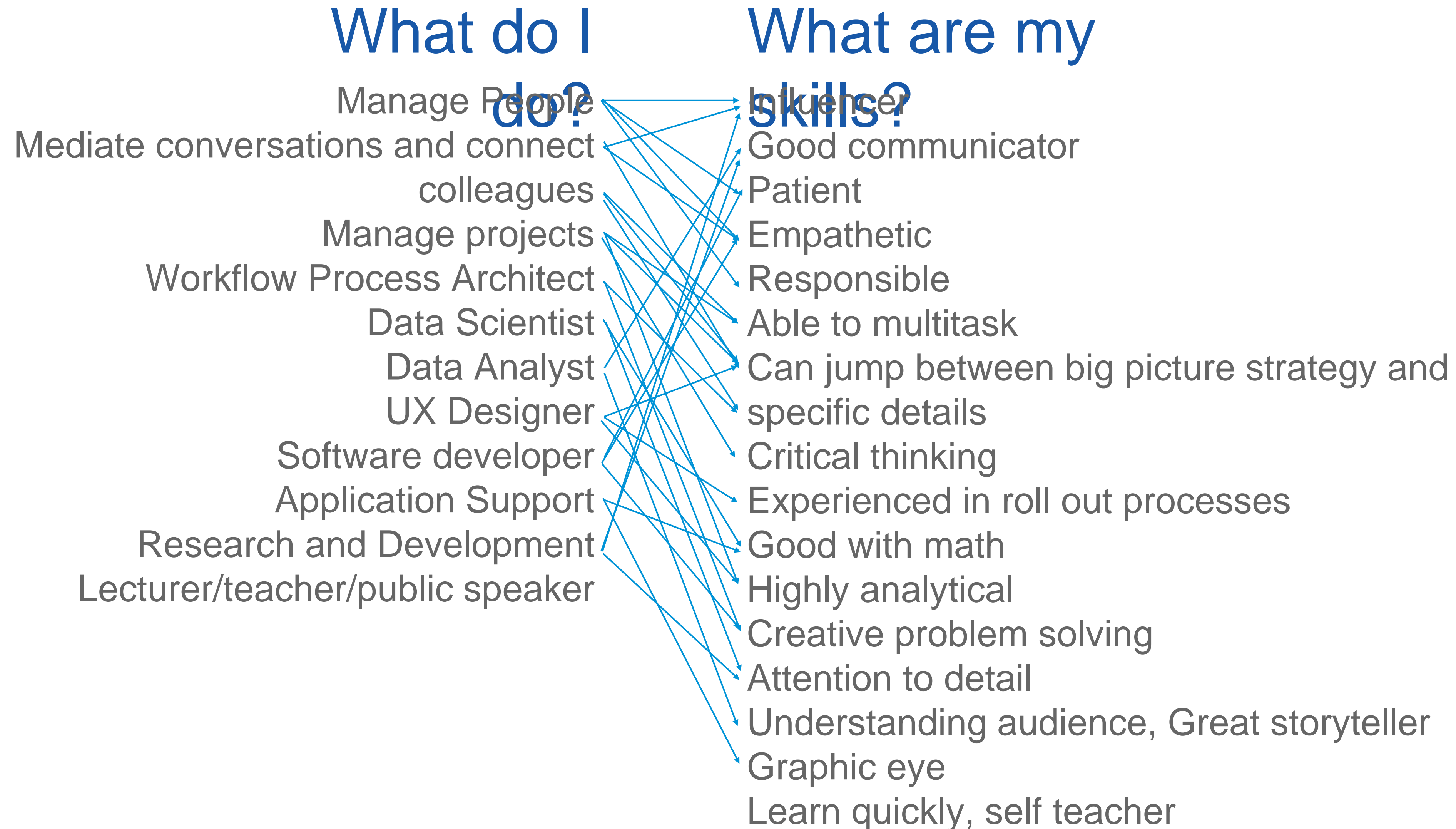




How do you build and maintain the right team?



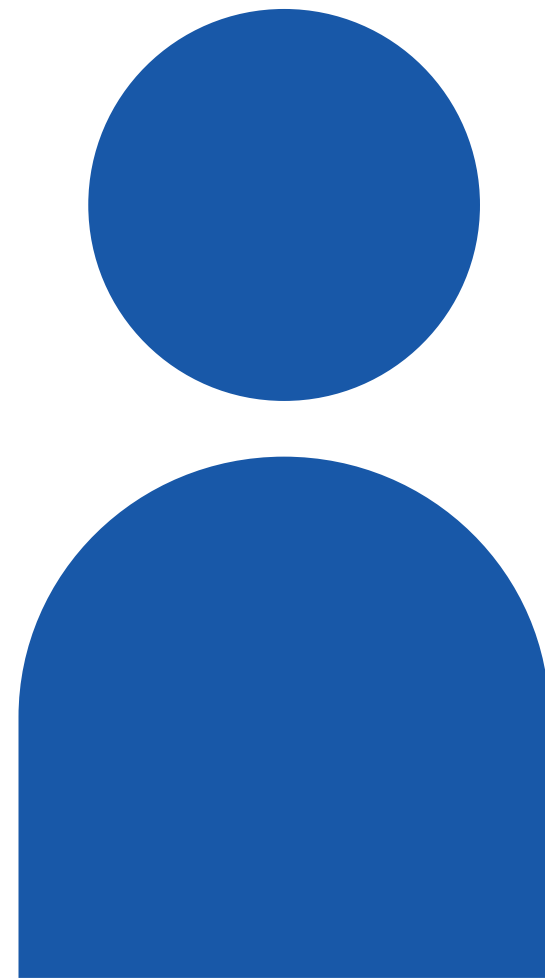
# How do you define the skills you need?



# How do you know what skills your people have?

I need Michelle  
for this project

I need someone  
who has  
experience in...



Michell

- ✓ Running user group meetings
- ✓ Managing a BIM model
- ✓ Developing a program



Bo

- ✓ Running user group meetings
- Managing a BIM model
- ✓ Developing a program



Sara

- ✓ Running user group meetings
- ✓ Managing a BIM model
- ✓ Developing a program
- + Previous experience in this project type



# How do you know what skills your people have?

0 - No Experience    1 - Need Guidance    2 - Experienced    3 - Can Teach Others    L - Would Like to Learn (hover-?)

Overall experience with the following Tools

	0	1	2	3	L		0	1	2	3	L
Revit	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	Sketchup	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
Dynamo	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>	Newforma	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
Navisworks	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	Adobe CS	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
AutoCAD	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	Rhino	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
Virtual Reality Software <u>Enscape, Unreal Engine</u> <input type="radio"/> <input type="radio"/> <input checked="" type="radio"/> <input type="radio"/>											
3D Rendering Software <u>Enscape, Lumion, Unreal</u> <input type="radio"/> <input type="radio"/> <input checked="" type="radio"/> <input type="radio"/>											
Energy Modeling Software (fill-in the blank) <input type="radio"/> <input checked="" type="radio"/> <input type="radio"/> <input type="radio"/>											
Simulation Tools (fill-in the blank) <input type="radio"/> <input checked="" type="radio"/> <input type="radio"/> <input type="radio"/>											
Data Viz <u>Power BI, Tableau</u> <input type="radio"/> <input type="radio"/> <input checked="" type="radio"/> <input type="radio"/>											
other (fill-in the blank) <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/>											

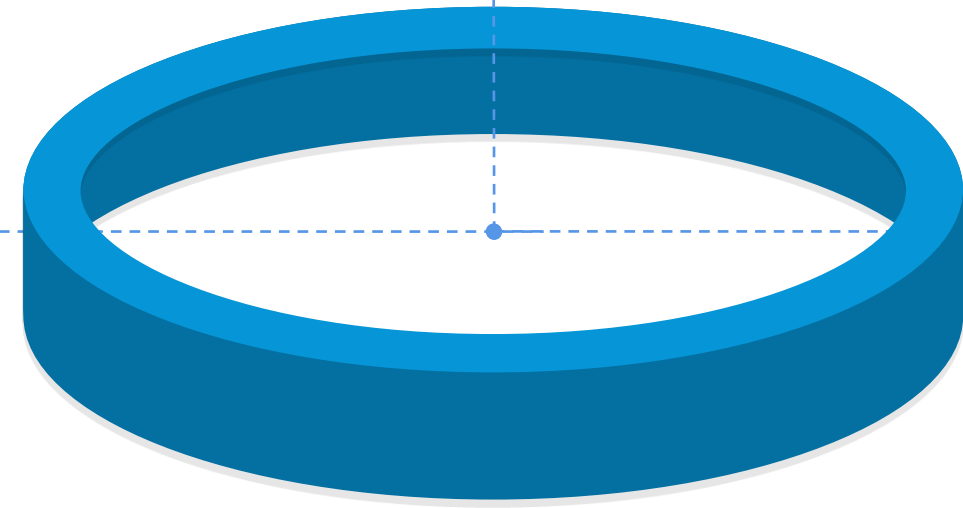
hover over title for example

0 - No Experience	1 - Need Guidance	2 - Experienced	3 - Can Teach Others	L - Would Like to Learn	
<b>I have experience with...</b>					
<b>Design Content and Execution</b>	0	1	2	3	L
<i>entire category</i>					<input type="checkbox"/>
Create original building design concepts	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Develop or expand upon building design concept	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Execute directed changes of design concepts	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Develop Program. Specialty: <u>(fill-in the blank)</u>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lead Space Planning. Specialty: <u>(fill-in the blank)</u>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Develop interior design schemes	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Management</b>	0	1	2	3	L
<i>entire category</i>					<input type="checkbox"/>
Lead Team. How many: <b>1-5</b>	<input type="radio"/>		<input checked="" type="radio"/>		<input type="radio"/>
Manage multiple projects teams concurrently	<input type="radio"/>		<input checked="" type="radio"/>		<input type="radio"/>
Lead the following meetings	Board/ Trustees	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Owner/ Steering	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	User	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
	Facilities	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Develop overall project cost	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Develop design fee and write proposal	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Develop staff work plan (in Delttek)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Construction Administration</b>	0	1	2	3	L
<i>entire category</i>					<input type="checkbox"/>
Serve as contact for Contractor	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Review project cost estimates	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Review shop drawings. Specialty: <u>(fill-in the blank)</u>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Respond to RFIs	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Perform field observation and create field report	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Perform punch walks	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Extended Services</b>	0	1	2	3	L
<i>entire category</i>					<input checked="" type="checkbox"/>
Perform user research <small>(surveys, shadowing, focus groups)</small>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Organize and analyze datasets	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Use LEAN methods and tools	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Synthesize data & research into recommendations	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Documentation of Design and Ideas</b>	0	1	2	3	L
<i>entire category</i>					<input checked="" type="checkbox"/>
Create 3D render images	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Diagram and create presentation materials (2D)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Put together project construction documents	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Develop architectural cartoon set	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Coordinate with consultants	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Perform code analysis	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Develop life safety documents	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Detailing</b>	0	1	2	3	L
Exterior/ Core-Shell	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Interior/ Fit-Out	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Specialty <u>(fill-in the blank)</u>					
Perform product research: Exterior/ Core-Shell	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Interior/ Fit-Out	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Specialty <u>(fill-in the blank)</u>					
Develop sustainable strategies	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Administer LEED certification process	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Perform building site analysis	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Select interior finishes	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Prepare finish board/presentation material	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Select and specify furniture	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Develop or write specifications	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Coordinate or review specifications	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ability to Hand-Sketch Diagrams or Details	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Building Information Modeling (BIM):</b>	0	1	2	3	L
<i>entire category</i>					<input type="checkbox"/>
Pick Up red lines/comments	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	

(click "focus mode" for exportable list)

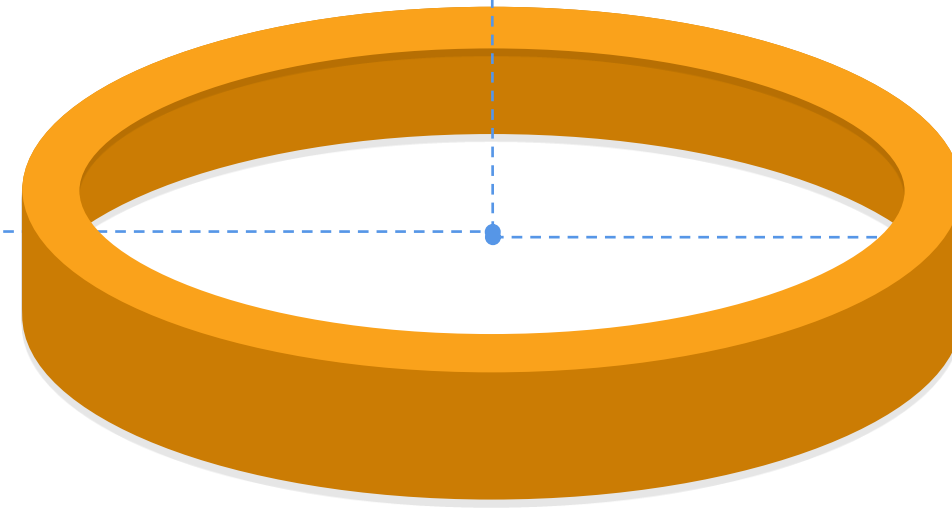
PreferredName	Andrew Kunkin		Angela Watson		Bill Wiley		Tatiana Thompson		William Chaberge	
Category	Exp	Learn?	Exp	Learn?	Exp	Learn?	Exp	Learn?	Exp	Learn?
<b>Building Information Modeling (BIM)</b>										
BIM: Create 3D families	1		1		1		2			
BIM: Manage BIM model	0		0		1		3			
BIM: Model & produce documents using 3D elements	2		1		1		2			
BIM: Perform 3D Consultant Coordination	1		0		1					
BIM: Perform advanced modeling	1		0		0		3	yes		
BIM: Pick Up red lines/comments	3		1		3		2			
<b>Construction Administration</b>										
CA: Perform field observation and create field report	2		1		3		0			
CA: Perform punch walks	2		1		3		0			
CA: Respond to RFIs	3		2		3		1			
CA: Review project cost estimates	3		2		3					
CA: Review shop drawings	2		2		3		1	yes		
CA: Serve as contact for Contractor	3		2		3					
<b>Design Content and Execution</b>										
Design Content: Create original building design concepts	3		3		2				2	yes
Design Content: Develop interior design schemes	3		2		2		1	yes	1	yes
Design Content: Develop or expand upon building design concept	3		3		3				2	yes
Design Content: Develop Program, Specialty	2		3		3				2	yes
Design Content: Execute directed changes of design concepts	3		3		3		1		2	yes
Design Content: Lead Space Planning, Specialty	3		3		3					
<b>Documentation of Design and Ideas</b>										
Documentation: Administer LEED certification process	0	yes	2		1					
Documentation: Coordinate or review specifications	2		2		3					
Documentation: Coordinate with consultants	3		2		3		1	yes	0	
Documentation: Create 3D render images	3		2		0		1		2	
Documentation: Detailing Exterior	2		2		3		1			
Documentation: Detailing Interior/ Fit-Out	2		1		3		2			
Documentation: Develop architectural cartoon set	3		2		3		2			
Documentation: Develop life safety documents	2		1		3		1			
Documentation: Develop or write specifications	0		1		3					

# Today's Topic - RECAP



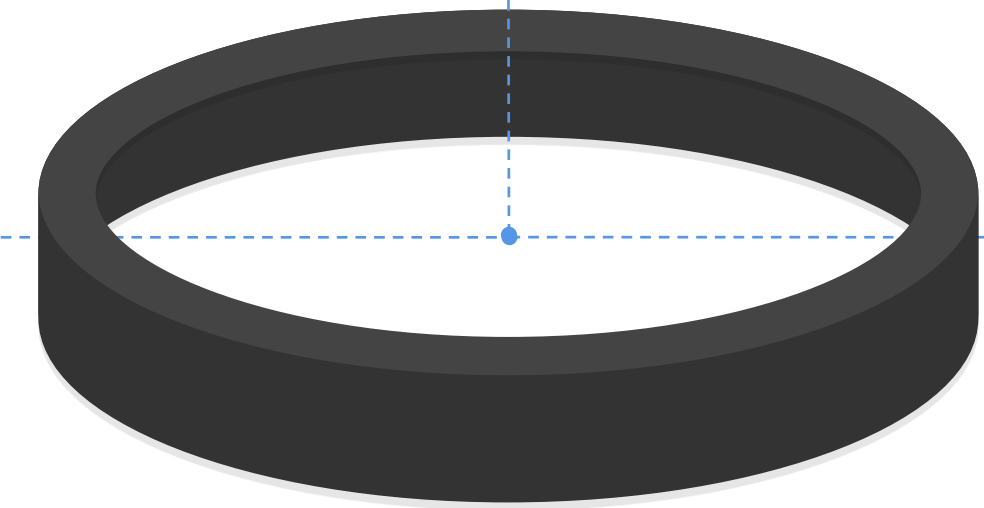
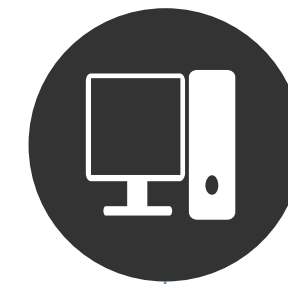
## People

Identifies all the employees that could significantly affect external and internal software usage, behaviors, and satisfaction.



## Process

Examines the relationships among these learning experiences and key training processes to reduce overlapping responsibilities and increase collaboration between process teams and customer experience teams



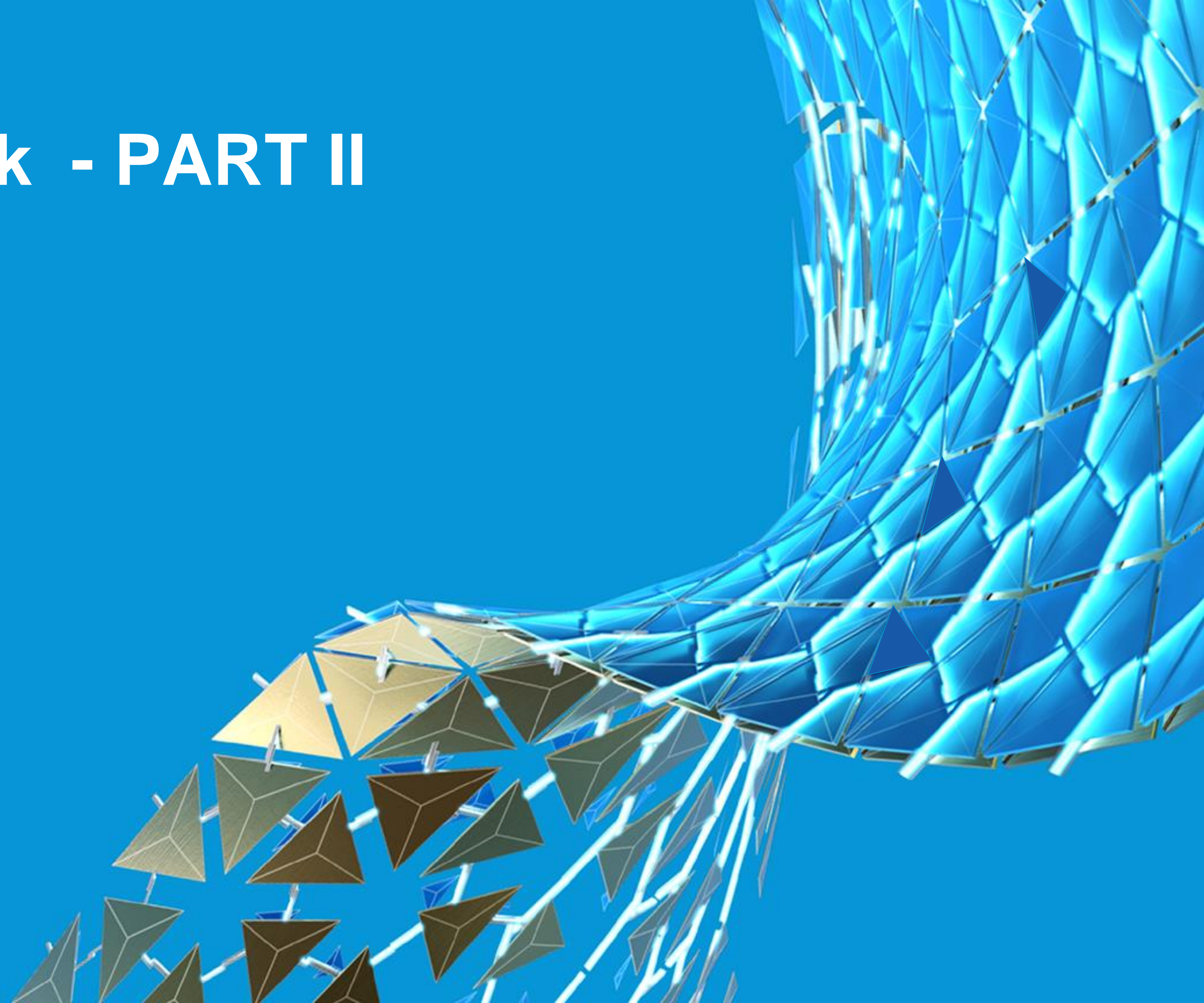
## Profits

Focus on number of licensed technology systems to improve the processes that will support the firm's design goals.



# Section Break - PART II

## Process





# What does a successful process look like?

Action,

Development,

Operations,

Practice,

Design,

Procedure,

Automation,

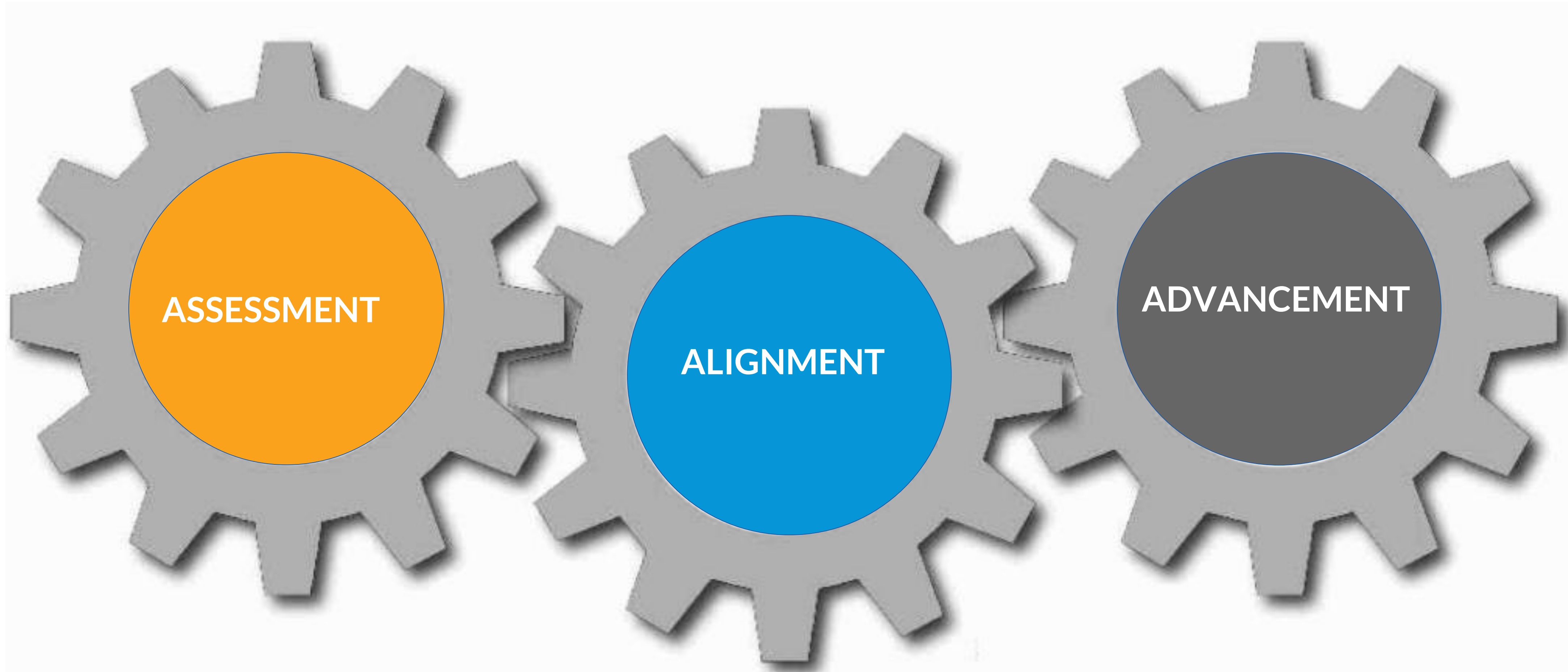
Progress,

Guidelines,

Measure,

Rules,

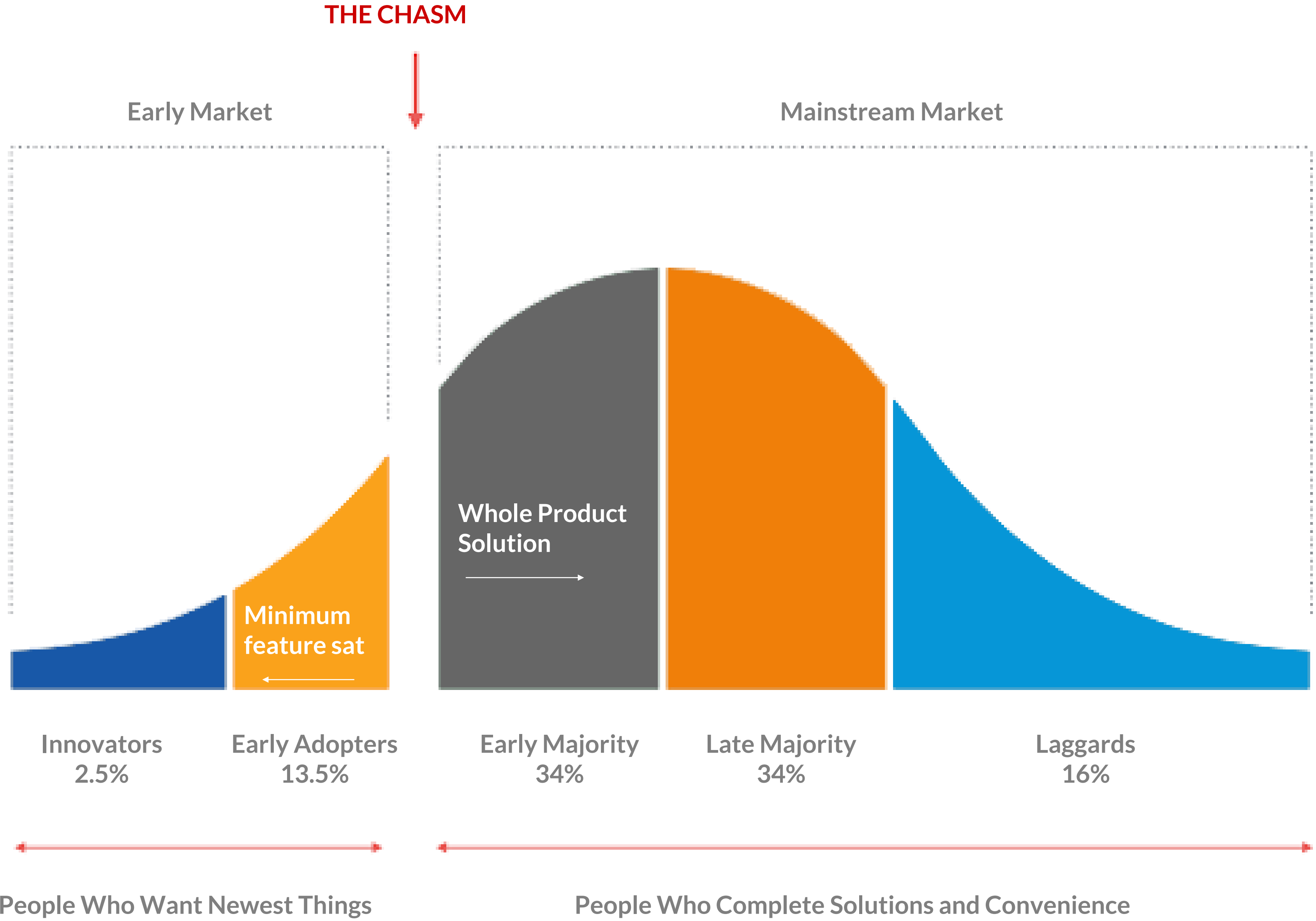
Techniques.

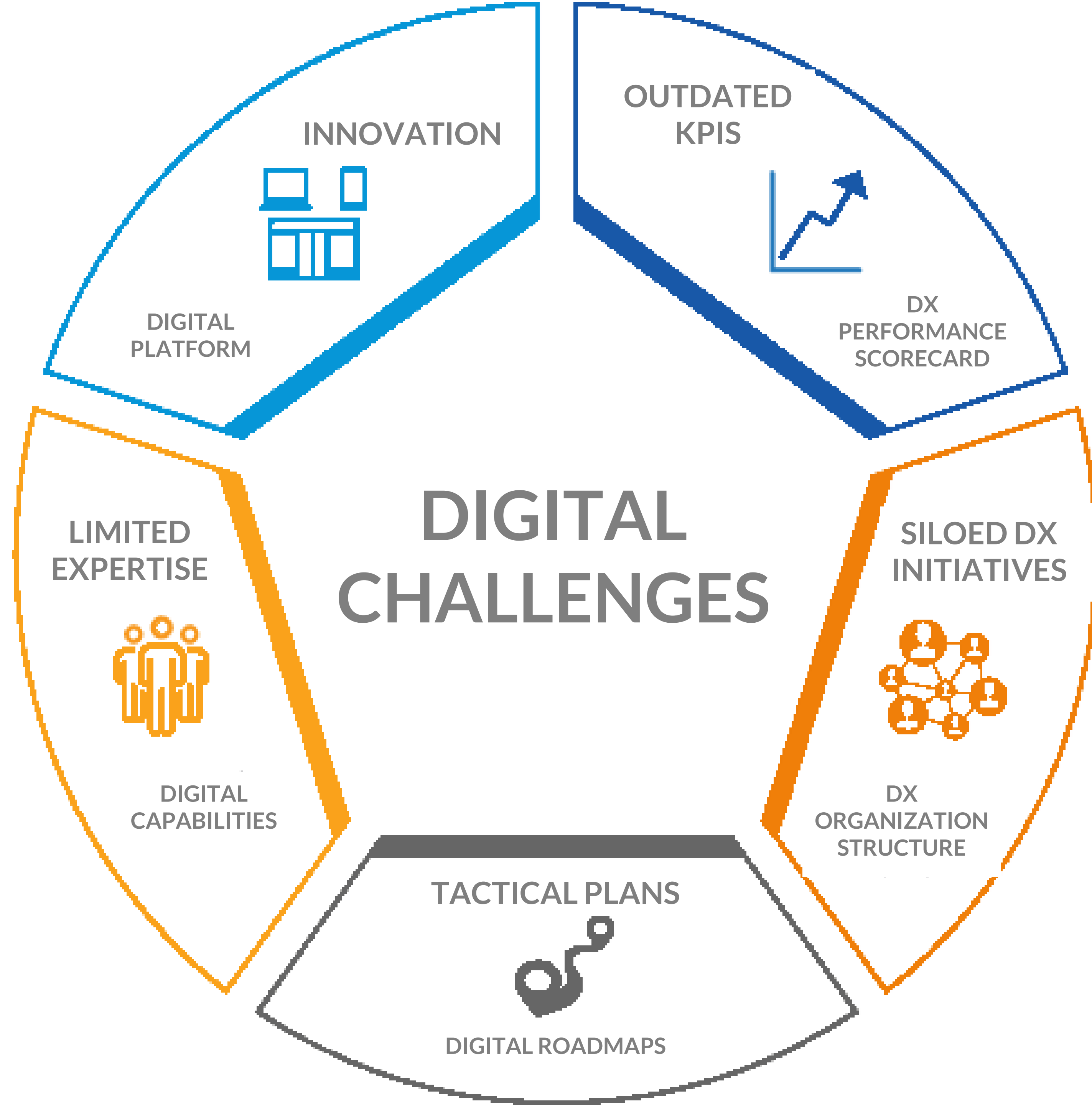


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## BIM ORGANIZATION PLANNING PROCEDURE









## 04. MAP OUT TECHNOLOGY

Choose tech solutions that scale with your long-term strategy.

## 05. SEEK OUT PARTNERS & EXPERTISE

Do more - and do it faster - with partners that share in your vision.

## 06. GATHER FEEDBACK & REFINE

Be flexible, learn from experience, and adjust accordingly.

## 07. SCALE & TRANSFORM

New ways to improve will emerge - embrace them!

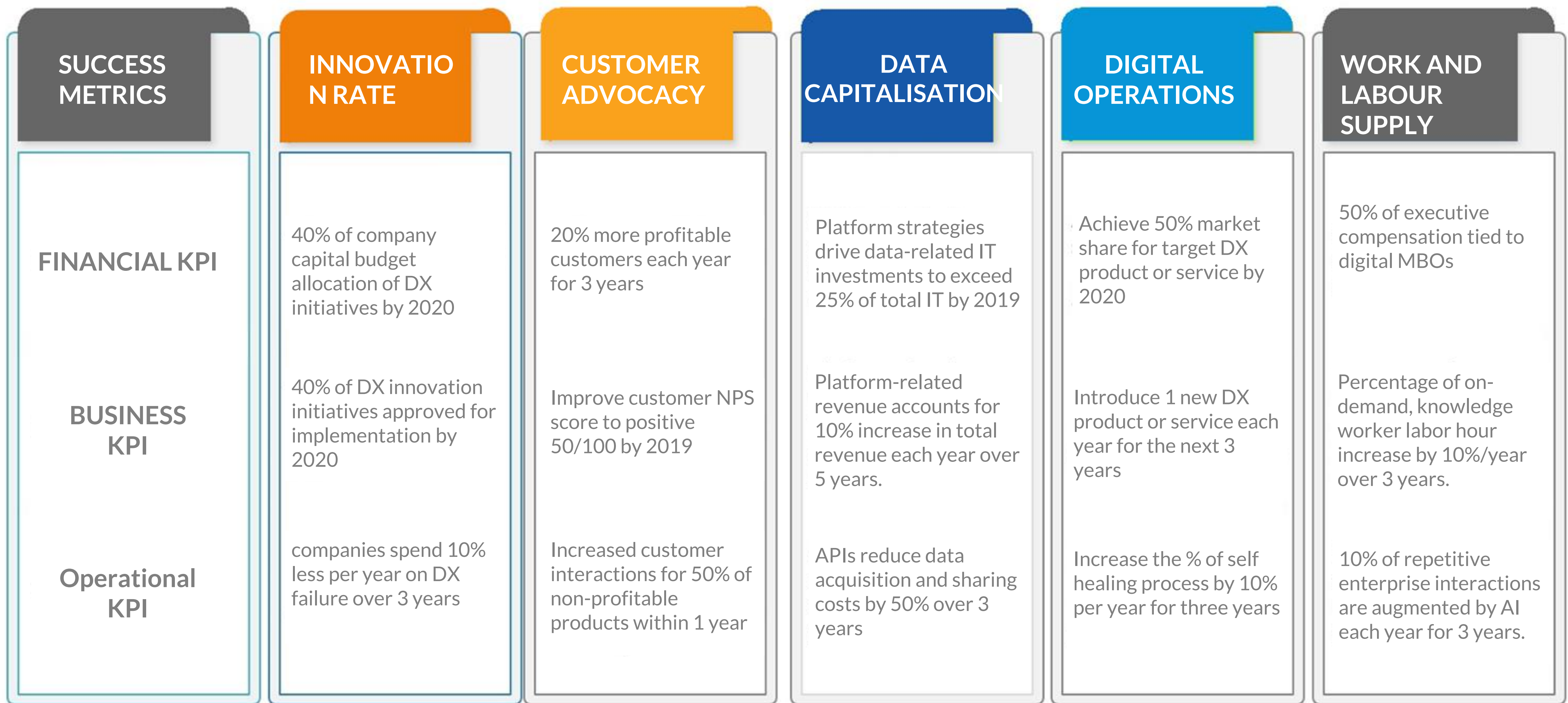
## 02. PREPARE FOR CULTURE CHANGE

Put humans at the heart of digital transformation.

## 01. ALIGN ON THE WHY

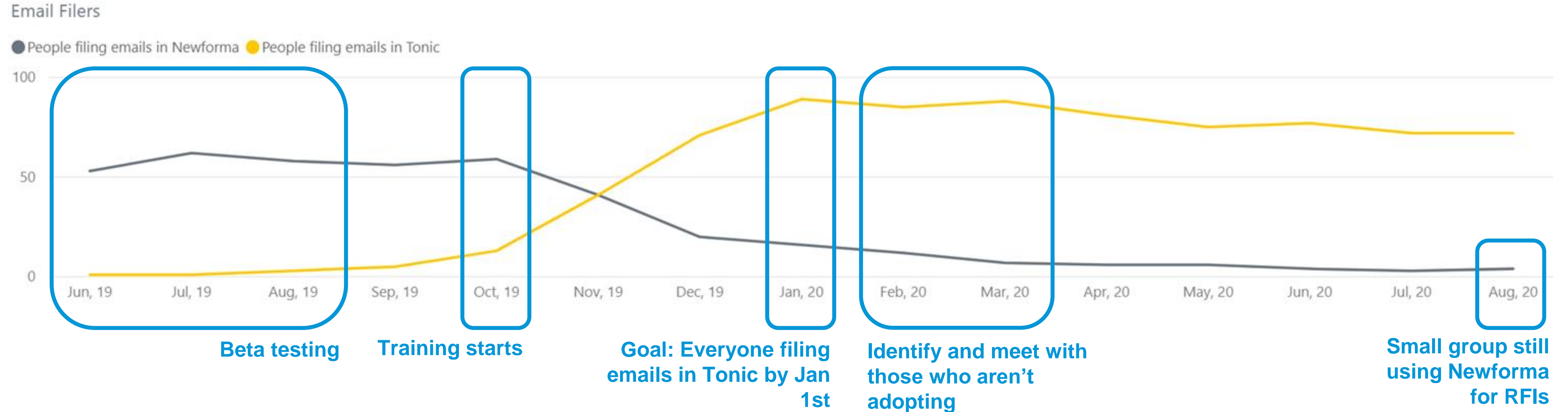
Define the business value of digital transformation.





SAMPLE DASHBOARD





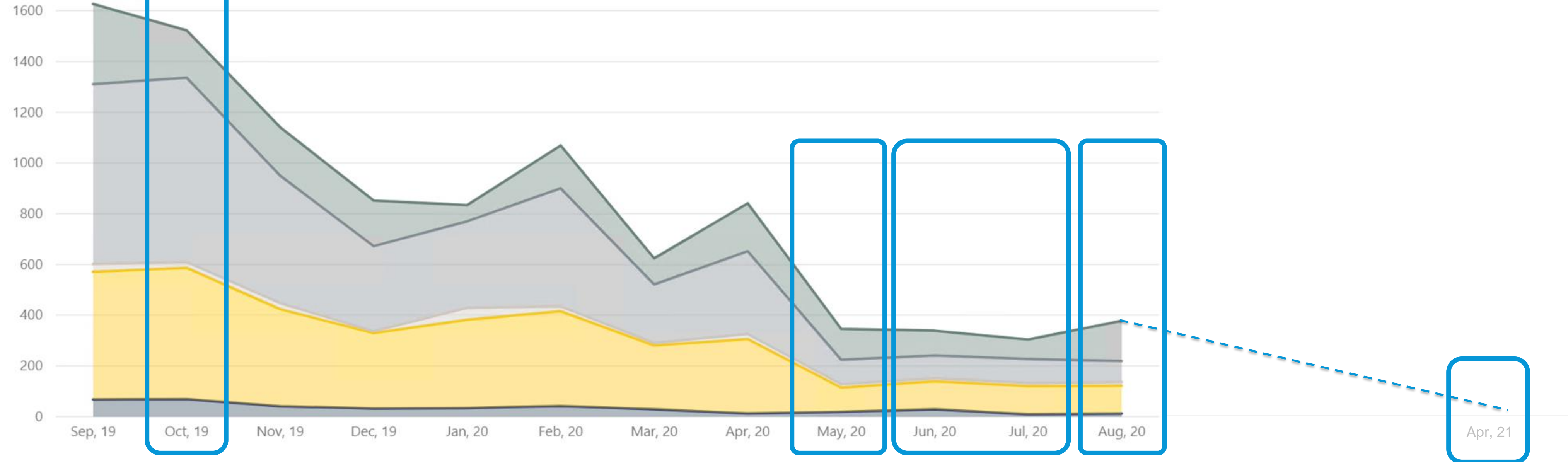
# Tracking Adoption

Software usage data can be used as a tool for tracking the success of the roll out of an initiative or process.



Newforma Activity use

Category ● Bulletins ● RFIs ● Site Visits ● Submittals ● View/Markup



Tonic email adoption starts

Reduced number of licenses renewed, "the bottleneck"

Identify and meet with those who aren't adopting

Notify teams we will not be renewing as many licenses

Goal set to renew significantly less licenses

# Tracking Adoption

Software usage data can be used as a tool for tracking the success of the roll out of an initiative or process.

# Enscape Usage

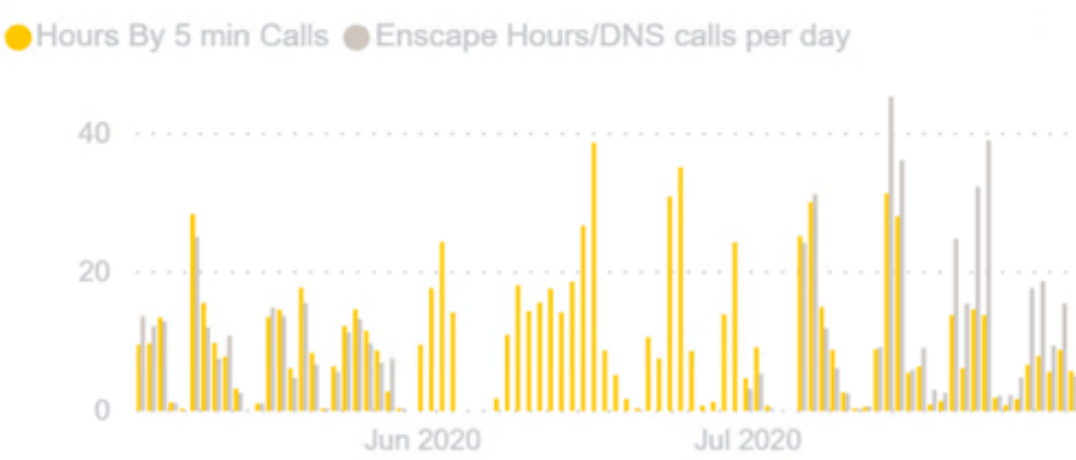
5/1/2020

8/1/2020

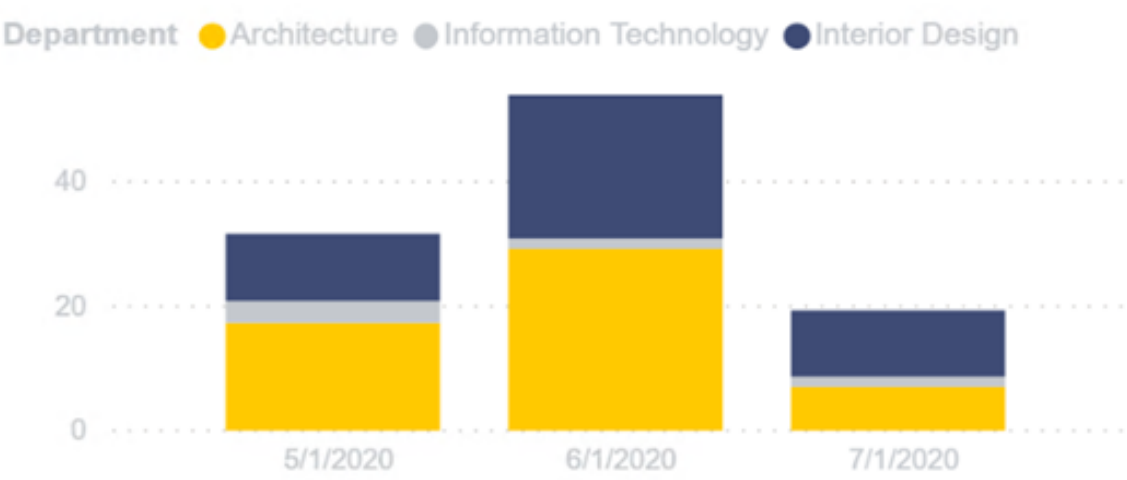
Enscape Users

Windows User	Hours	Department
coltrane	200.75	Architecture
gmarquet	140.75	Architecture
ccorley	88.75	Architecture
nhubb	69.17	Architecture
avigneau	68.33	Interior Design
ccango	43.42	Architecture
jsueck	41.08	Architecture
nhubb-banks	33.17	Architecture
krosenbaum	30.42	Architecture
cmoussa	29.08	Interior Design
avilanova	25.83	Architecture
jones	12.25	Architecture
nhubb	11.92	Interior Design
lparicio	9.50	Interior Design
vna	6.33	Architecture
klaffido	6.17	Architecture
sedwards	5.00	Information Technology
avshayev	4.92	Architecture
storange	4.67	Information Technology
hsori	0.67	Interior Design
little	0.67	Architecture
skanitz	0.17	Architecture

Usage by Day



Median Hours each month by User Department



Enscape Monthly report vs Calculated usage from DNS data

MonthStart	Enscape Report Hours	Hours (DNS calls x5)	Windows User
7/1/2020	1.50	1.67	storange
7/1/2020	54.67	50.37	avigneau
7/1/2020	18.85	19.08	avilanova
7/1/2020	22.17	20.95	cmoussa
7/1/2020	28.17	30.00	coltrane
7/1/2020	3.17	3.08	ccorley
7/1/2020	7.67	7.00	jsueck
7/1/2020	5.21	4.67	lparicio
7/1/2020	30.23	30.42	krosenbaum
7/1/2020	9.98	10.67	nhubb
7/1/2020	39.06	39.58	nhubb
7/1/2020	8.00	3.00	nhubb-banks
7/1/2020	56.75	57.17	gmarquet
7/1/2020	0.17	0.42	sedwards
5/1/2020	0.02	0.17	skanitz
5/1/2020	19.32	18.92	avigneau

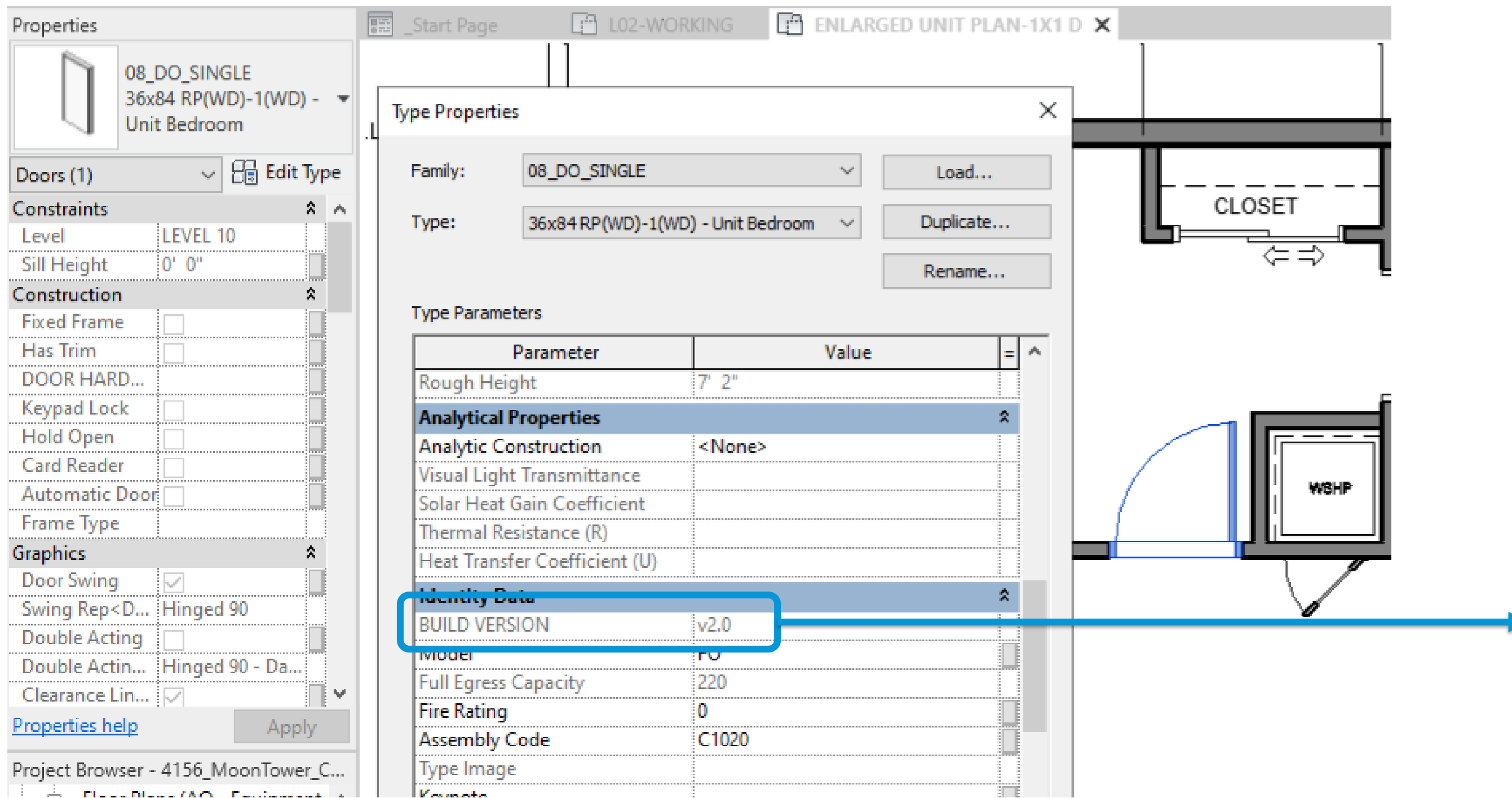
Calls to the Enscape License Server

Date	Time	Username
5/11/2020	4:32:00 PM	avigneau
5/11/2020	4:37:00 PM	avigneau
5/11/2020	4:42:00 PM	avigneau
5/11/2020	4:47:00 PM	avigneau
5/11/2020	4:52:00 PM	avigneau
5/11/2020	4:57:00 PM	avigneau
5/11/2020	5:02:00 PM	avigneau

# Tracking Adoption

If the software company doesn't provide you with usage data, you might be able to find ways to get it yourself





Projects using Newest Door Families

Projects using old versions of the door families

89

61

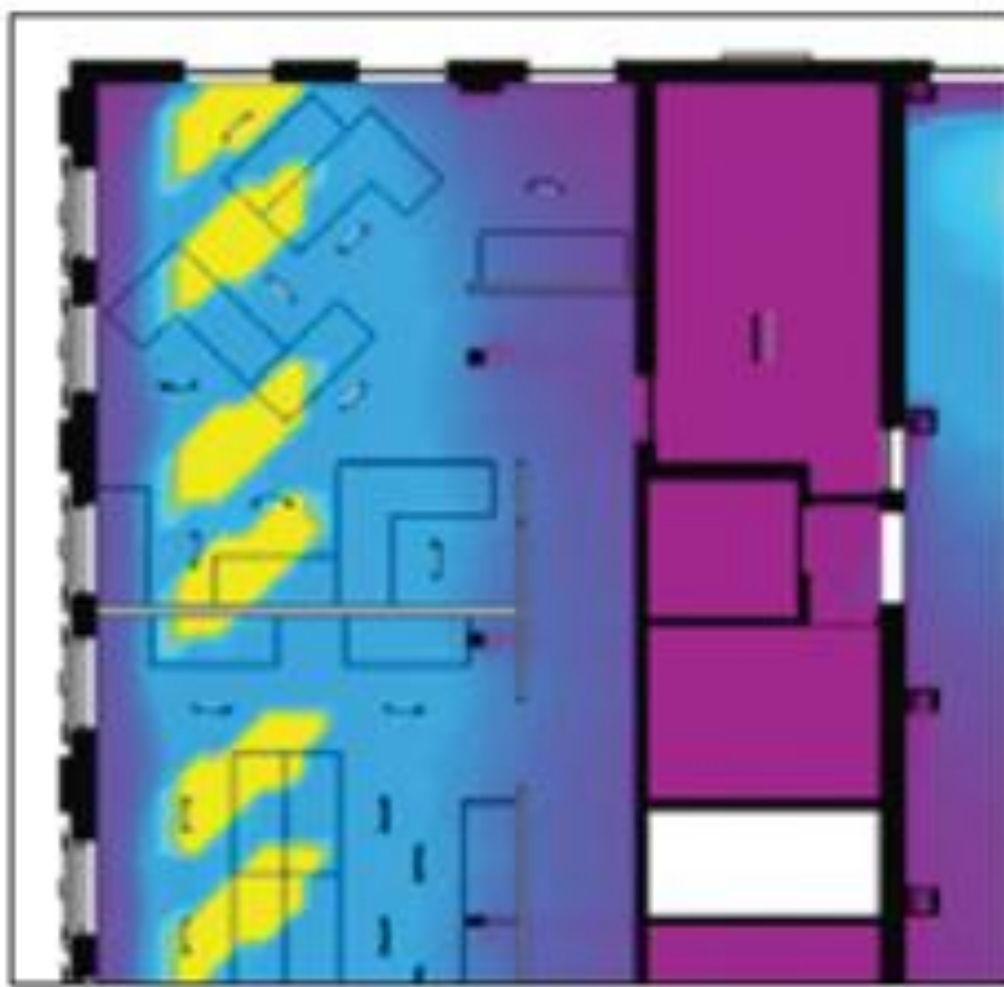
Number of Projects by Door Family

FamilyName	Projects	Build Number
DO_SINGLE	51	2.2
DO_DOUBLE	46	2.2
	45	1.4
08_DO_SINGLE	34	1.4
DO_SINGLE W SIDELITE	33	2.2
08_DO_DOUBLE	31	1.4
DO_DOUBLE EGRESS	25	2.2
08_DO_CASED OPENING	24	1.4
DO_CASED OPENING	24	2.2
CP_DO_SINGLE	21	1.4
DO_ELEVATOR	21	2.2
CP_DO_DOUBLE	20	1.4
DO_SINGLE DBL ACT	18	2.2
DO_DOUBLE UNEVEN	16	2.2
08_DO_DOUBLE UNEVEN	14	1.4
DO_SLIDING BREAKAWAY	13	2.2
08_DO_ELEVATOR	12	1.4
08_DO_SINGLE W SIDELITE	12	1.4
08_DO_SLIDING	12	1.4
CP_DO_SINGLE GLASS	11	1.4
DO_OVERHEAD-ROLLING	11	2.2
DO_SLIDING	11	2.2

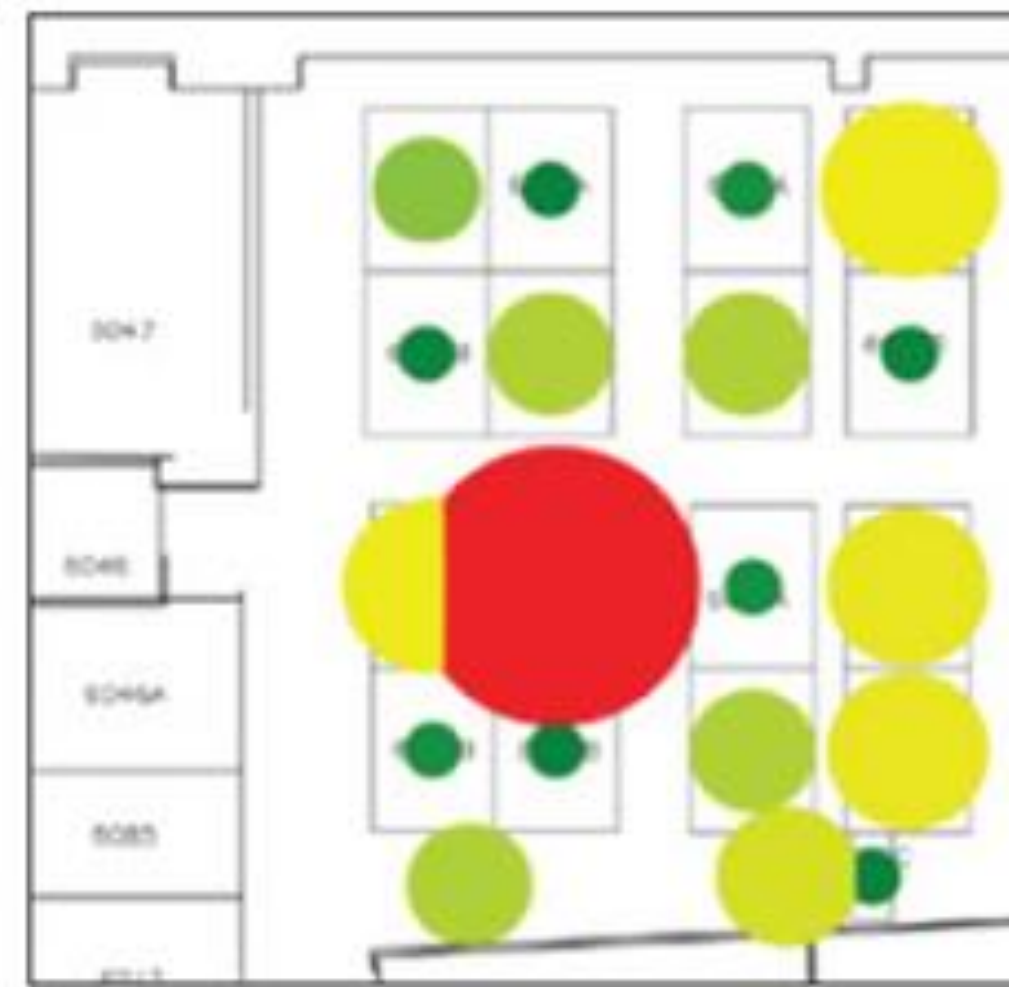
# Tracking Adoption

Build data into the process wherever you can

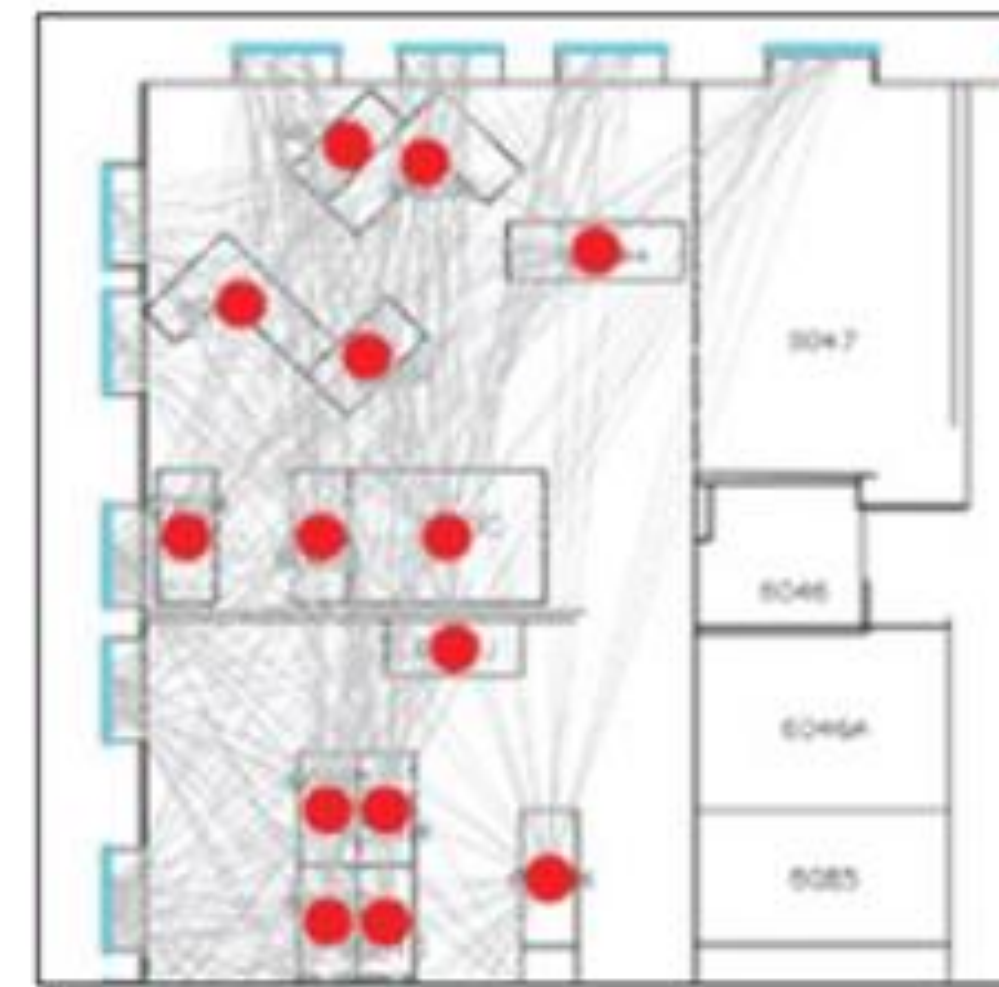




1. Daylight



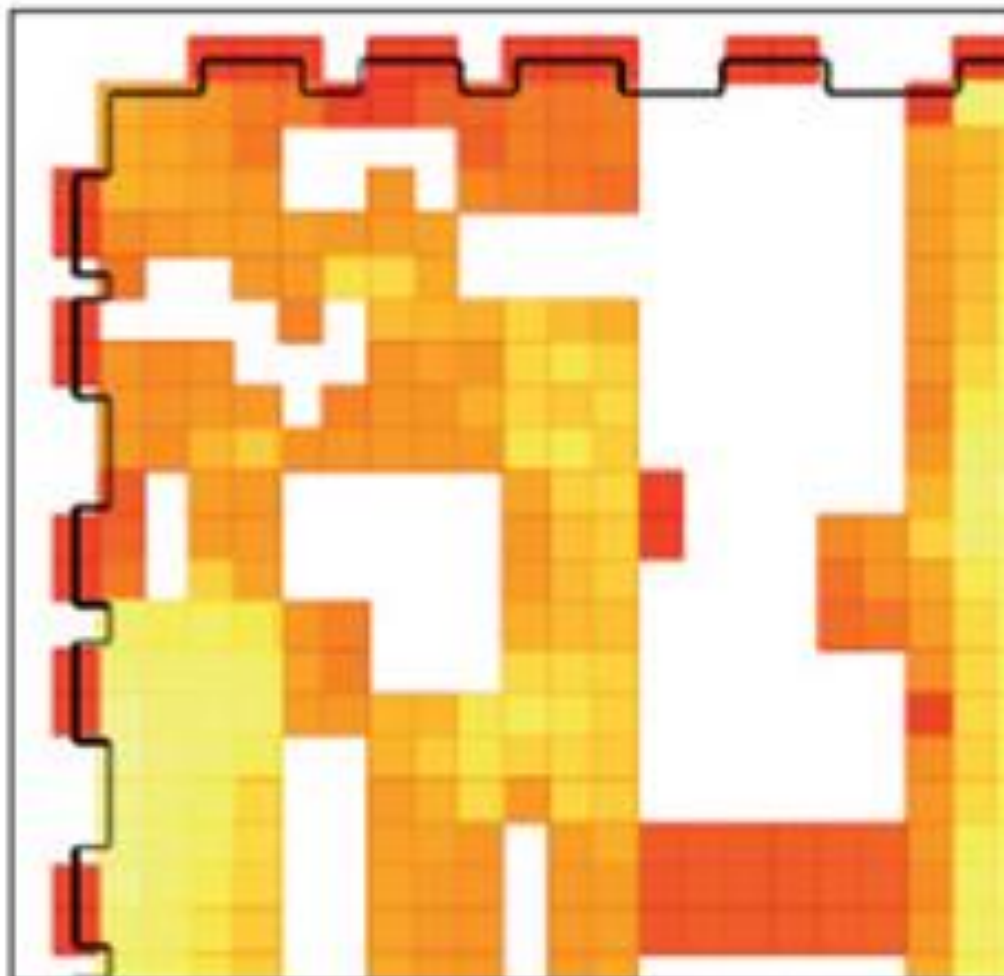
2. Low Visual Distraction



3. Views to Outside



4. Adjacency Preference



5. Circulation



6. Work Styles



7. Low Acoustic Distraction



8. Low Density

Source: Autodesk <https://www.autodesk.com/solutions/generative-design/architecture-engineering-construction>

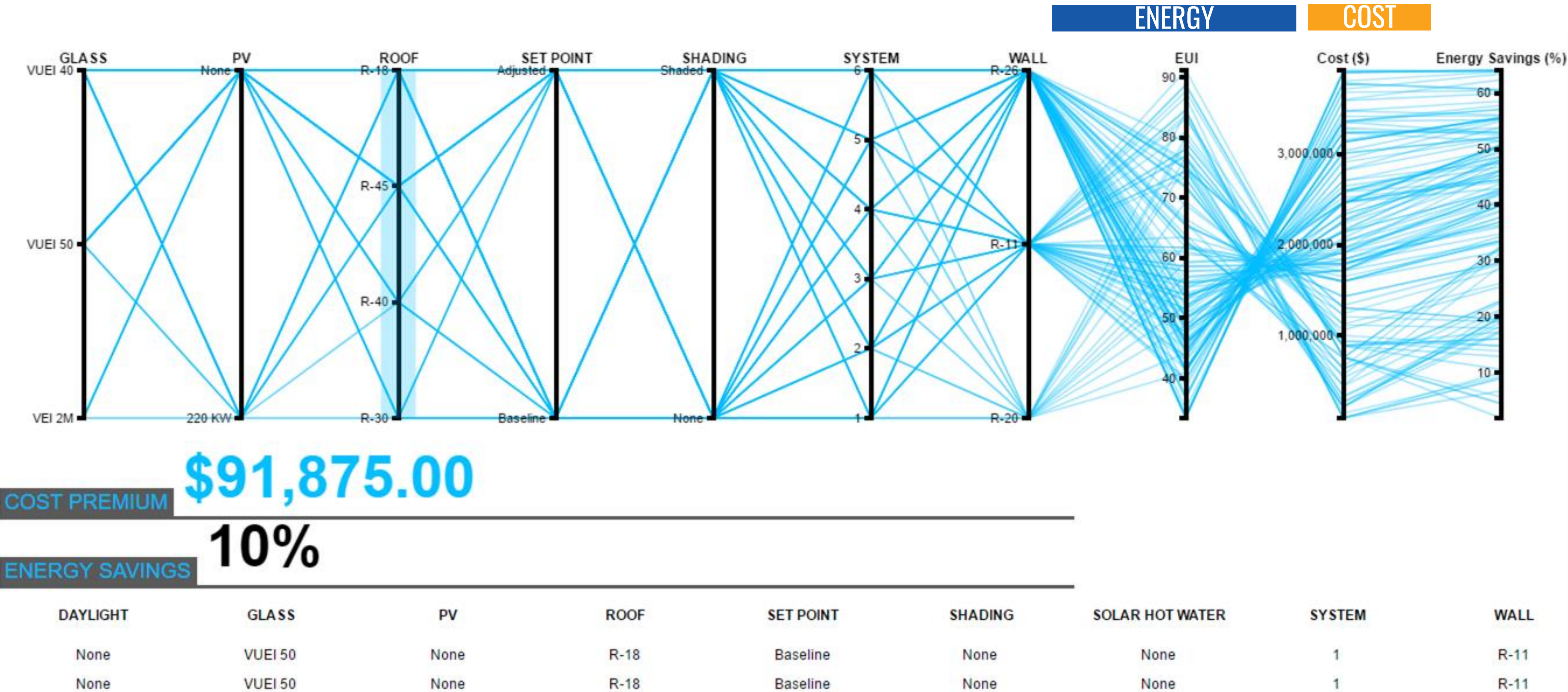
# GENERATIVE DESIGN



# COST VS ENERGY OPTIMIZATION: COVETOOL

Selecting Cheapest Option for Energy Code Compliance

SOURCE: <https://www.cove.tools/>





# Cove.tool helps achieve higher productivity and reduces construction cost



01

## Automation

Reduces errors and dramatically increases the number of professionals able to use the software.

02

## Speed

Most design decisions need to happen concurrently and in real time. Consultants take weeks to answer questions.

03

## Data Driven Design

Data collection increases predictive and generative abilities of the platform.

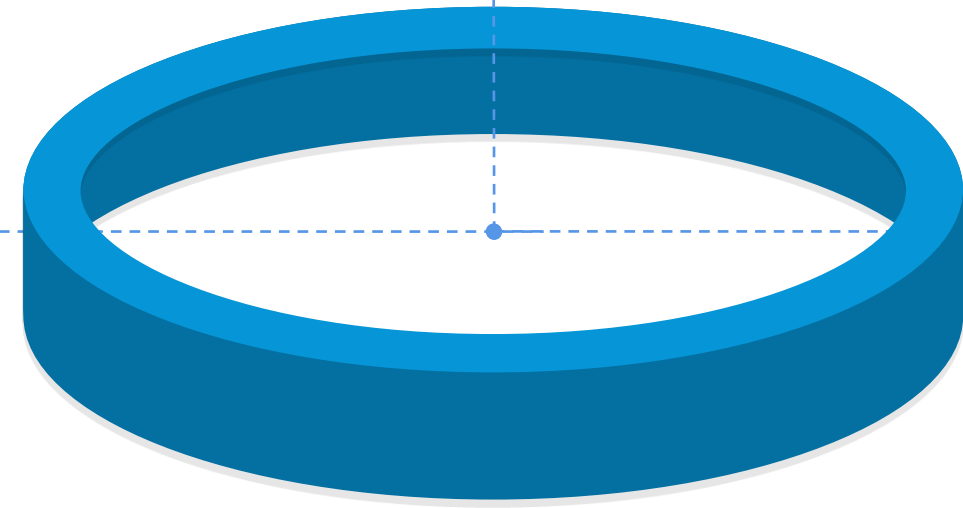
04

## Cost Optimization

Linking all decisions back to a common metric (cost) links together design, construction, and manufacturers.

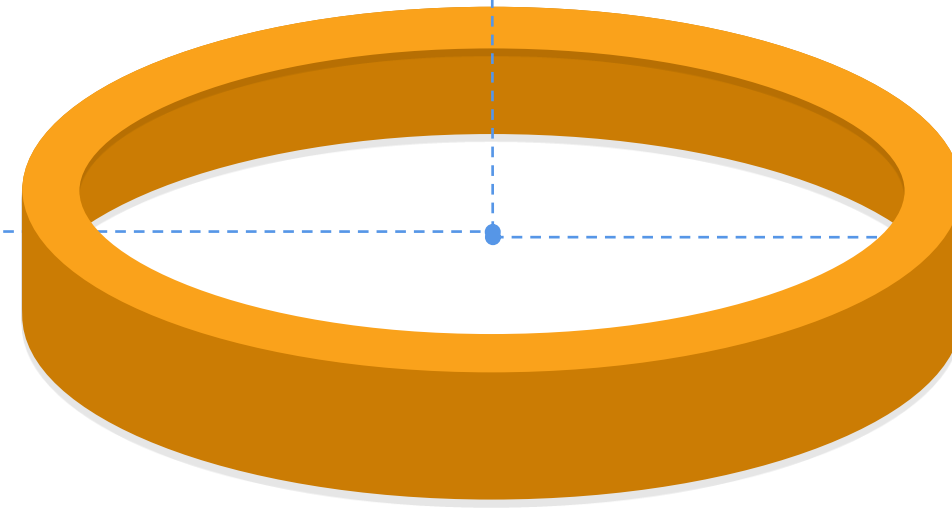
SOURCE: <https://www.cove.tools/>

# Today's Topic - RECAP



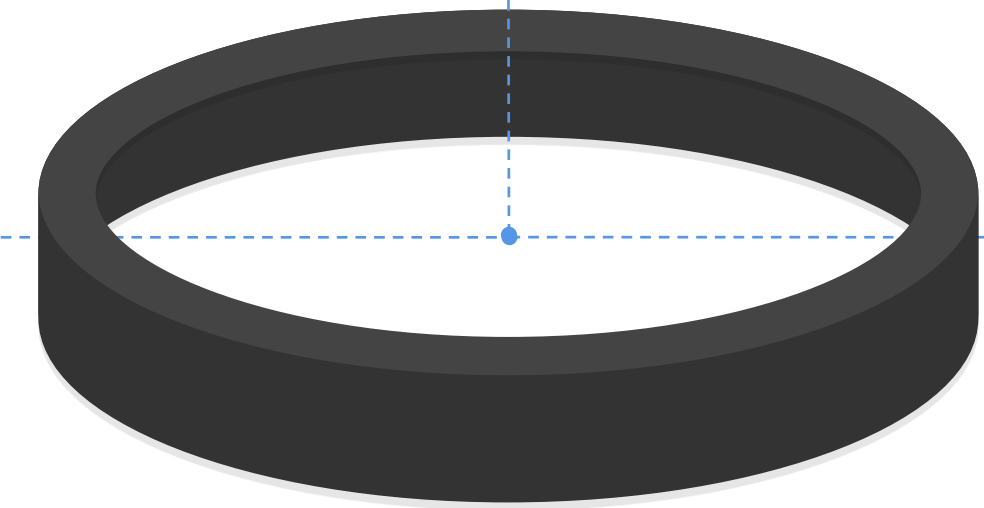
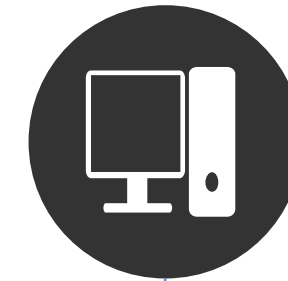
## People

Identifies all the employees that could significantly affect external and internal software usage, behaviors, and satisfaction.



## Process

Examines the relationships among these learning experiences and key training processes to reduce overlapping responsibilities and increase collaboration between process teams and customer experience teams



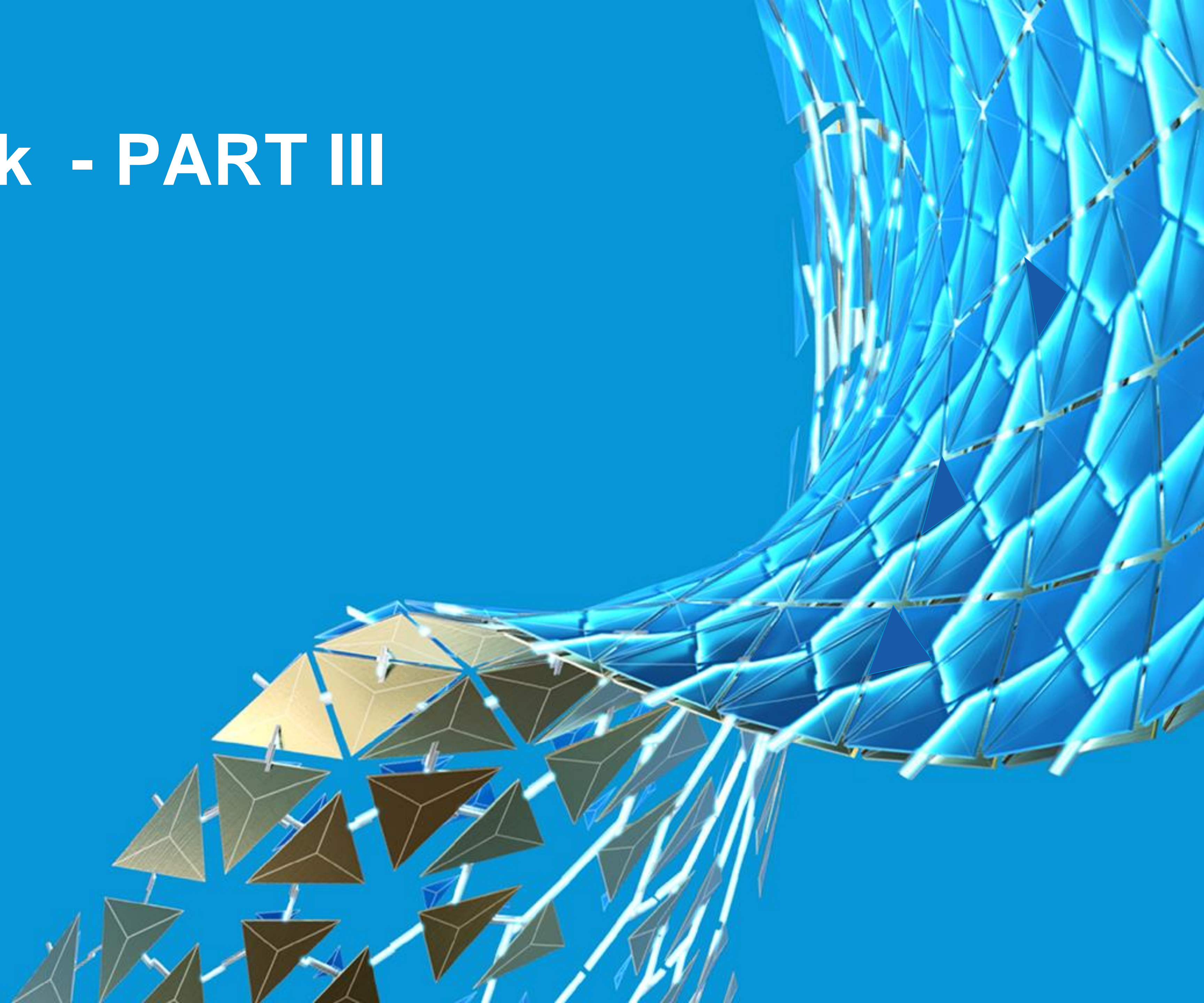
## Profits

Focus on number of licensed technology systems to improve the processes that will support the firm's design goals.

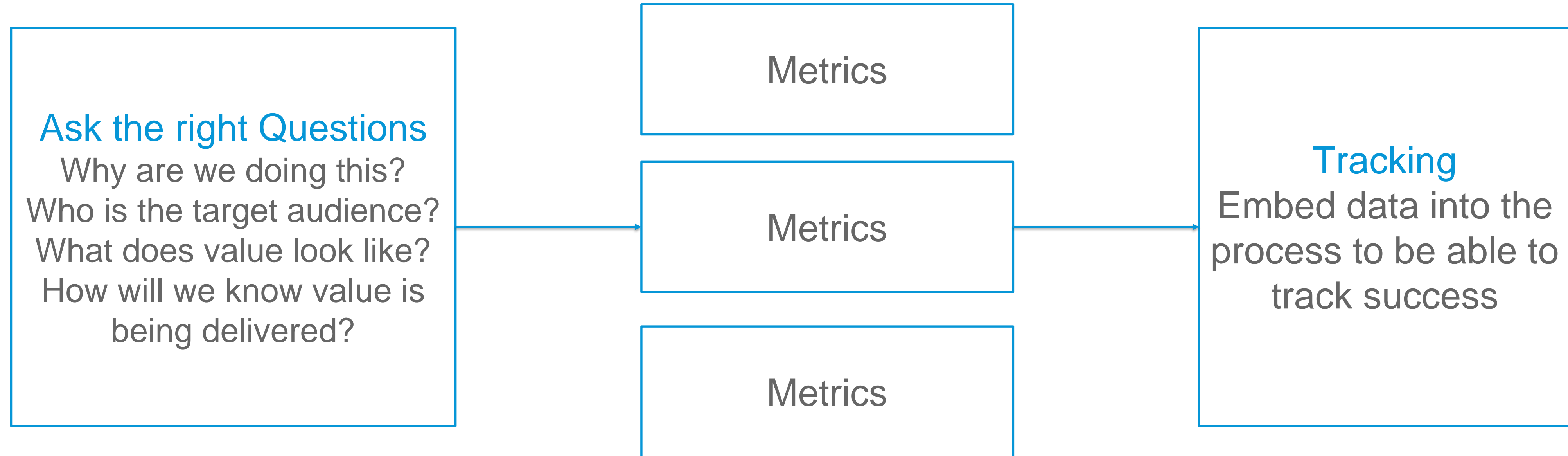


# Section Break - PART III

## Profits



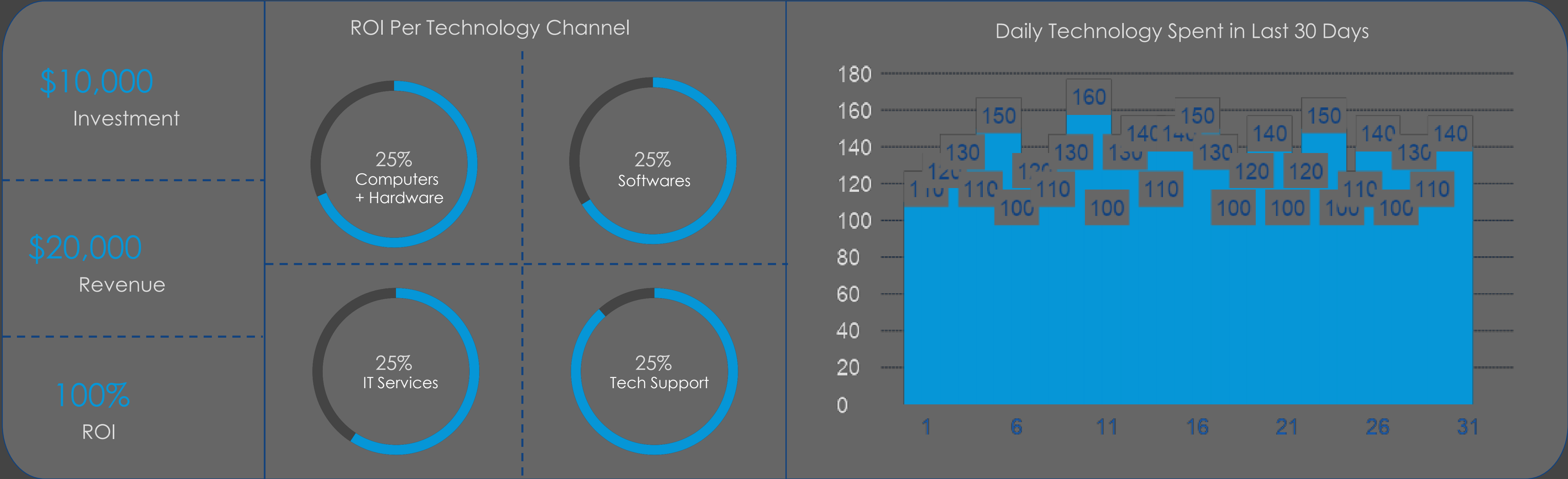




# Tracking Metrics of Success

What does something do for us? knowing why can help us know if the metrics identified are right for making sure we meet the goals we set.

# Example: Technology ROI Dashboard

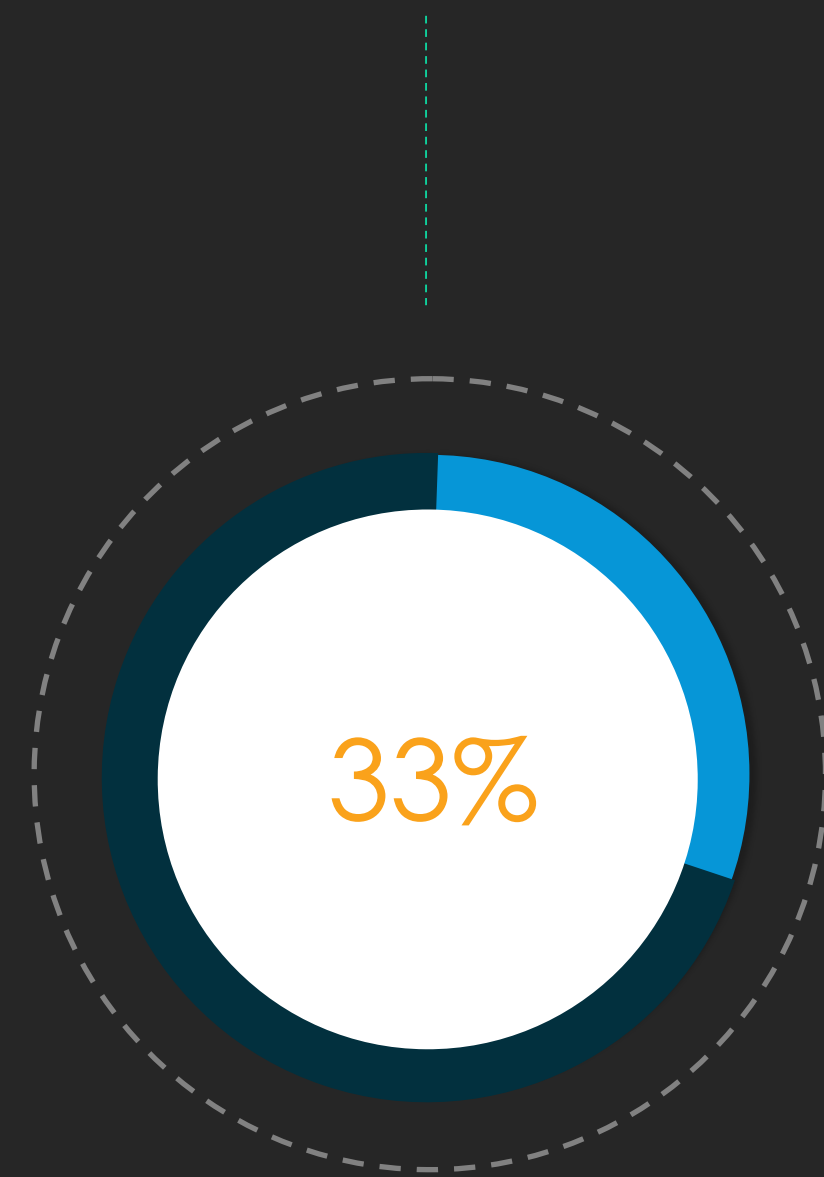


Time Period	Revenue	QoQ Growth of Revenue	Market Share	Depreciation value (divide by 12 to get year)	Relative Market Share	TCO (total cost ownership)
Q 1	\$111.4K	-22.4%	11.1%	x/3	65.8%	43.71%
Q 2	\$158.4K	32.8%	43.6%	x/3	88.8%	46.98%
Q 3	\$145.24K	-6.2%	12.7%	x/3	37.8%	5.78%
Q 4	\$333.4K	-5.1%	73.7%	x/3	47.3%	8.54%



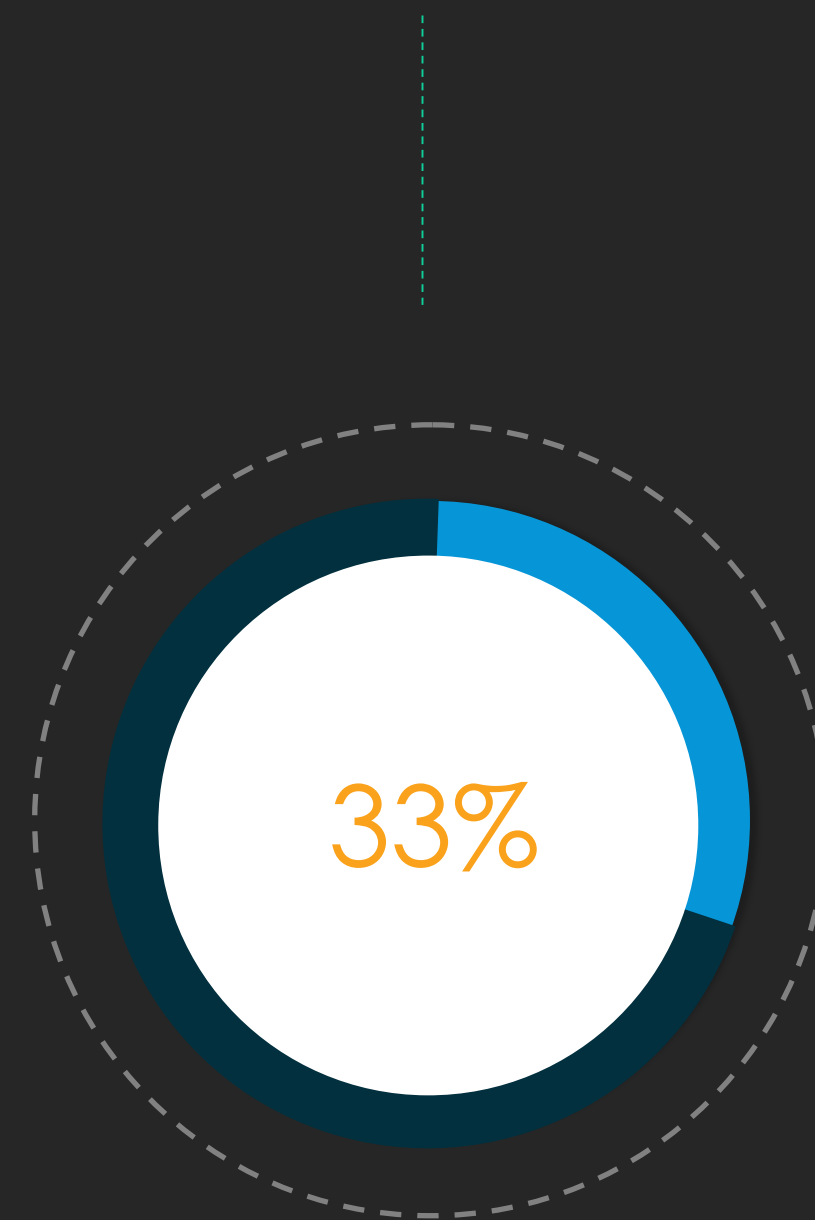
# Three Pillars

People



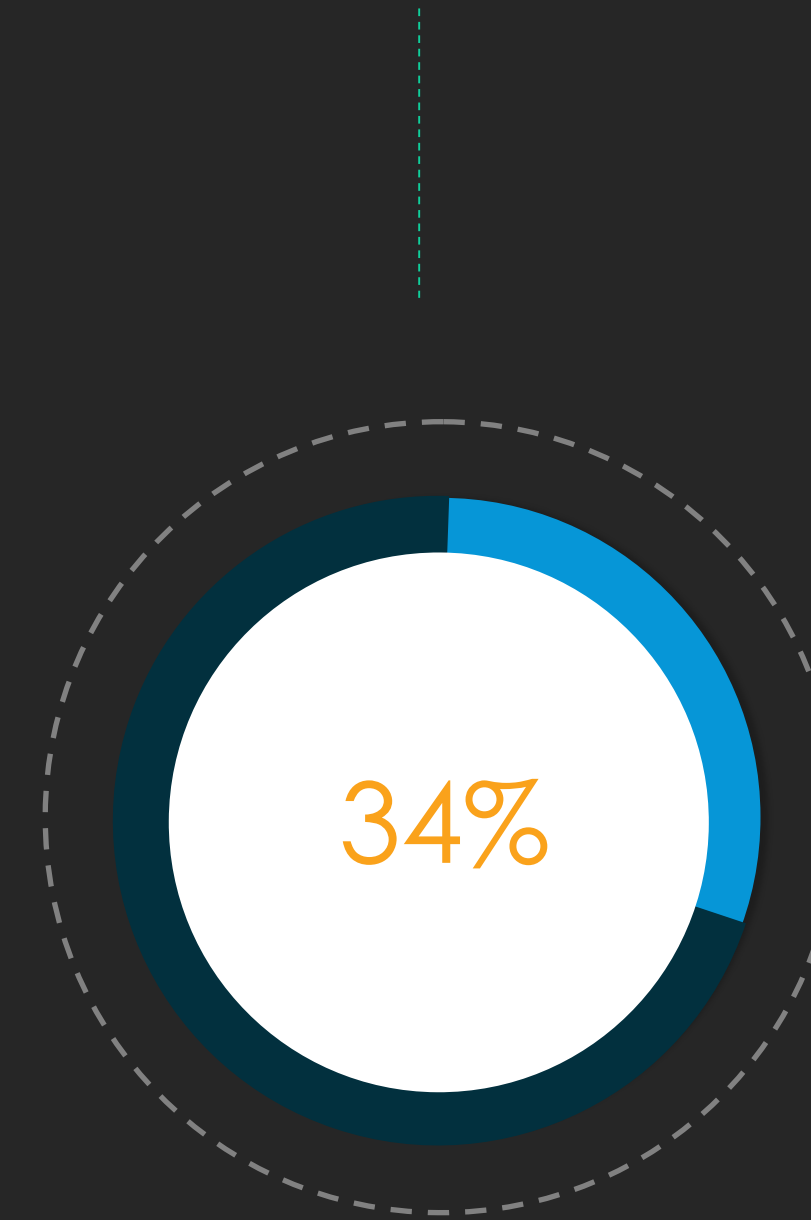
+

Process



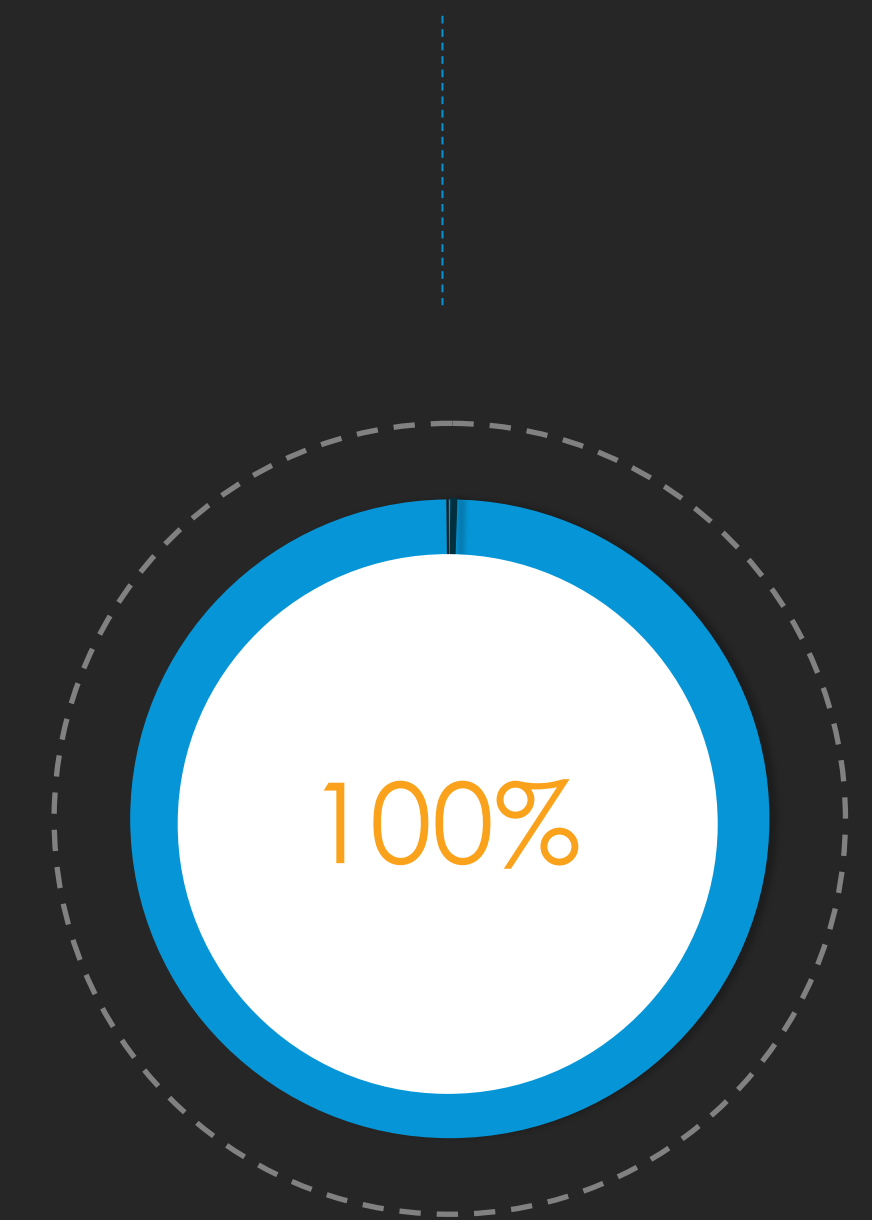
+

Profits



=

**TOTAL**



Implement a better system for tracking professional talents

Start compiling a weekly "Office Highlights" newsletter to all team members

Review software options for incoming license tracking

Improve our document and information management procedures

# SWOT Analysis

## S

### STRENGTH

- Same day delivery within the city
- Urban core has 1 hour delivery expectancy
- High-quality products
- Trusted and high product sales exposure

## W

### WEAKNESS

- No monthly subscription option or scaled payment arrangement
- Inaccessible to a larger consumer audience
- Poorly optimized SEO

## O

### OPPORTUNITY

- Optimize current mobile app for responsiveness and built-in feedback
- SEO focus can help drive a great amount of traffic & improve online sales ranking

## T

### THREAT

- Can operate at a loss to drive away competition
- Costly state laws to oversee grocery delivery and accountability under review/evolution





***What does the future hold?***





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