

E-technology Survey Results of SMPS Members and A/E/C Clients

**Presented by
Kienle Communications, Ltd.
Sunbelt Research Associates, Inc.**

**Presented to
the Society for Marketing Professional Services
August 2001**



TABLE OF CONTENTS

SCOPE AND METHODOLOGY	2-3
Background/Objectives	2
Methodology	2
EXECUTIVE SUMMARY	4-6
Overall	4
E-technology Capability	5
Web Site Use	5
Web Site Design and Content	6
Internet Security	6
DETAILED FINDINGS	7-41
Profile of Respondents	7
Current Capabilities	9
Web Sites	11
Web Use	16
Web Site Design	21
Member/Client Perceptions	26
Client Selection Criteria	33
Personal Satisfaction with E-technology Skills	35
Challenges and Strategies Facing Organizations	36
APPENDIX	42-64
Pre-Survey Invitation	42
E-mail Invitations	43
Follow-up E-mail to Members who Responded	45
Member Survey	47
Client Survey	55
CONTACT INFORMATION	65

SCOPE AND METHODOLOGY

Background/Objectives

Each year, the Society for Marketing Professional Services (SMPS) Foundation awards at least one grant during the academic year to support research in a topic that will further the Foundation's mission and support its goals. The Foundation's mission is to *promote research and education that advances the body of knowledge of professional services marketing to develop a greater understanding of the role of and value of marketing in the industries they serve*. Its goals are to:

- ✓ promote research to understand the role of marketing in shaping competitive organizations and influencing the direction of public and private business sectors
- ✓ educate students, public opinion leaders, and industry decision-makers about the knowledge, skills, tasks, processes, and impact of marketing professional services

The grant this year was awarded to Kienle Communications, Ltd. Kienle Communications recommended conducting a web-based survey among SMPS members and architectural, engineering, and construction company clients. The objectives of the research were to determine:

- ✓ current perceptions of and plans for using electronic communication technology
- ✓ perceptions about the advantages/disadvantages of electronic communication technology
- ✓ the needs relative to electronic communication technology
- ✓ differences between members and clients regarding electronic communication technology

Sunbelt Research Associates, Inc. (SRA) was commissioned by Kienle Communications to conduct the technical research for this project.

Methodology

Web-based survey

SRA designed two web-based surveys (one geared toward members and one geared toward clients). Each survey required approximately 8-10 minutes to complete.

Pre-survey invitation

SRA designed an e-mail letter that was sent to members from the SMPS board explaining the purpose of the research project and to expect receipt of two subsequent e-mails. The first e-mail sent to members was an invitation to complete the survey by clicking on a link embedded in the e-mail.

The second e-mail was an invitation for members to forward to their clients inviting them to complete the survey. Members were requested to inform SRA as to the total number of invitations they forwarded in order for SRA to determine the response rate among clients. Only a few members provided SRA with this information. Therefore, SRA cannot determine the client response rate.

The pre-survey invitations appear in the Appendix of this report.

Survey invitation

SRA designed an e-mail invitation that asked members and clients to participate in the survey research.

Members will receive a free electronic copy of the final report, which will be distributed by SMPS, as a gesture of appreciation for participating in the survey. Clients who participated were entered in a drawing for two free nights at a Marriott property.

Following are the steps SRA took in inviting members and clients to participate.

Members

- ✓ SMPS supplied SRA with an electronic listing of 4,527 member e-mail addresses
- ✓ SRA e-mailed invitations (with passwords) to each member with instructions to click on a link embedded in the e-mail that automatically sent members to the - web-based survey

Clients

- ✓ SMPS members e-mailed clients an invitation to complete the survey
- ✓ Members e-mailed invitations to each client with instructions to click on a link embedded in the e-mail that automatically sent clients to the web-based survey

The survey invitations also appear in the Appendix of this report.

Hosting

SRA hosted the web-based surveys on a site offering a secure NT server. The surveys were accessible from June 15 through July 9, 2001.

Response rate

Among the 4,527 members sent an invitation, 475 (or 10%) SMPS members completed the survey. This results in data that has a confidence level of 95%, with a standard error of +/-4.25.

The survey was completed by 52 clients. The response rate cannot be determined since SRA does not know the number of clients who received the survey invitation. Thus, results from the client portion of this research should be viewed as directional information.

Presentation

Kienle Communications and SRA presented the findings from this research at the SMPS national conference, which was held in Orlando, Florida between August 8 and 11, 2001.

EXECUTIVE SUMMARY

Overall

SMPS members overestimate their clients' satisfaction with the e-technology their firms provide.

- 72% of members believe clients are satisfied with the member firm's e-technology skills.
- 50% of clients are satisfied with the member firm's e-technology skills
- Further, 66% of SMPS members are themselves satisfied with their firm's e-technology.

Employee training is among ways the A/E/C firms can improve their e-technology from the point of view of their clients.

- Members mentioned the following areas that are in need of improvement:
 - ✓ Employee training in e-technology
 - ✓ Availability of project information via web site
 - ✓ Improved communication with clients
 - ✓ Better/more up-to-date web sites
 - ✓ Faster response time

Members and clients agree that the single greatest challenge facing firms today is keeping up with technology.

- 33% of members, and 38% of clients, cite keeping up with technology as the single greatest challenge facing their companies.
- Almost as significant is the 21% of members, and 28% of clients, who mention training/development of existing employees, and finding/retaining qualified employees as their greatest challenge.

Most firms will increase technology via expanding their software/hardware rather than with training programs.

- Over two-thirds plan on expanding their software as a means of increasing their firm's e-technology.
- Approximately, 50% of SMPS member firms will implement training programs.
- By comparison, 65% of clients will implement training programs.

Currently, e-technological expertise is not among the top criteria used to select an A/E/C firm. However, this finding may change in the future.

- The top criteria for selecting an A/E/C firm are expertise in a specialized area and responsive service.
- Only 11% feel a firm's e-technology expertise plays more than 50% level of importance in the selection of an A/E/C firm.
- 33%, however, feel expertise in e-technology will become a more important selection factor in the future, and 44% feel it will become somewhat more important.

E-technology Capability

SMPS members have greater technological capabilities than their clients.

- Virtually, all member firms have e-mail, facsimile, and Internet access.
- Nine in ten clients have these capabilities.

Clients tend not to be early adopters of new technology.

- Clients see themselves exactly the way SMPS members do. Six in ten view themselves as “waiting a little while” before acquiring new technology.

Availability of information is considered the primary advantage of e-technology.

- 52% of clients considered the availability of information as the primary advantage of e-technology.
- Members felt clients placed more importance on the time savings feature of e-technology than they actually do. 39% of members felt time was most important to clients, while only 27% of clients indicated this to be the case.
- Cost is not a primary advantage, with approximately 5% considering it primary.

The primary disadvantage of e-technology is loss of personal contact.

- Approximately two-thirds of members and clients agree that the loss of personal contact is the primary disadvantage of e-technology.
- This, coupled with the problem of information overload, can result in poor communication between clients and A/E/C companies.
- 90% of members have experienced compatibility problems with clients. However, a majority (64%) have these types of problems less than 10% of the time.

Web Site Use

Web sites are becoming the standard for providing information.

- 89% of members have an up and running web site, while 7% have a web site under construction.
- Approximately nine in ten members provide information on their web site, and do not sell products online.
- Over half of members use their web site to post and update project information.

Recommendations of friends and search engines are the most common ways to learn about web sites.

- 81% of members, and 79% of clients, learn about web sites from business associates and friends.
- 80% of members, and 77% of clients, use search engines to locate web sites.
- Yahoo is the most popular search engine among both members and clients.
- Google and Alta Vista are also popular with approximately half of members and clients.
- Lycos appears to have appeal among clients, with 64% using it.

The web is a good link between members looking for clients, and clients looking for consultants and vendors.

- 64% of SMPS members use the web to locate clients.
- 69% of clients use the web to find suppliers, vendors, and consultants.
- Over half of clients use the web to research A/E/C firms at least occasionally.

Members consider the web most effective as a communication tool, and least effective as a means of staff training.

- 68% of members agree that the firm they work for uses the web effectively to communicate with customers/clients.
- Only 31% agree that their firm uses the web effectively in training and development.

Web Site Design and Content

Over three-quarters of clients feel that a web site is an accurate reflection of the professionalism and image of an organization.

- 70% feel the visual appeal of the web site is important in the decision to look further.
- How to contact a company is the single most important content requirement. These include the following, mentioned by approximately nine in ten:
 - ✓ Telephone number
 - ✓ E-mail contact information
 - ✓ Basic brochure information
 - ✓ Current project information
 - ✓ Geographic location
- A higher percent of clients than SMPS members expect a web site to include the following:
 - ✓ Detailed company information (69% to 64%)
 - ✓ Client list (60% to 50%)
 - ✓ Bidding and selection information (37% to 23%)
 - ✓ Pricing information (13% to 2%)

Internet Security

Most member firms have at least one type of security system.

- One-third use only one type.
- Two-thirds use password protection for files.
- Six in ten use a limited access firewall.

Almost half of clients are very concerned about Internet security.

- Clients do not consider security as the primary disadvantage to using e-technology. Only 10% would categorize it this way.
- Nevertheless, 48% of clients are very concerned about e-technology security, with another 46% somewhat concerned.

DETAILED FINDINGS

Profile of Respondents

SMPS Members

(Base = 475)

Type of Firm	Total			
Architectural	25%			
Engineering	37%			
Construction	19%			
Other	19%			
		Architectural	Engineering	Construction
Firm Size (FTEs)		<i>(n=120)</i>	<i>(n=175)</i>	<i>(n=90)</i>
Less than 25	18%	24%	8%	7%
25 to 50	15%	18%	17%	8%
50 to 99	13%	23%	9%	10%
100 to 249	20%	17%	23%	27%
250 to 499	14%	8%	17%	21%
500 or more	19%	8%	25%	28%
Years in Business				
Less than 5 years	5%	3%	2%	1%
5 to less than 10 yrs	5%	3%	2%	6%
10 to less than 20 yrs	16%	19%	15%	12%
20 to less than 30 yrs	17%	21%	18%	9%
30 years or more	56%	54%	62%	72%
Total Annual Revenue				
Less than \$5M	25%	29%	22%	3%
\$5M to under \$10M	16%	25%	14%	2%
\$10M to under \$50M	25%	31%	31%	16%
\$50M to under \$100M	12%	8%	13%	21%
\$100M to under \$500M	12%	5%	9%	33%
\$500M or more	10%	2%	11%	24%
Not for profit	<1%	0%	0%	0%
Firm bought/merged/ been acquired/spun off within past year				
Yes	19%	10%	27%	17%
No	81%	90%	73%	83%

Note: Other types of firms include consulting; manufacturing; industrial; landscape architecture; urban design/planning; environmental; marketing; design; facilities management; and multiple categories.

Clients of SMPS Members*(Base = 52)*

Business Classification	
Commercial	25%
Government/Public	23%
Industrial	8%
Institutional	8%
Residential	2%
Other	35%
Firm Size (FTEs)	
Less than 25	17%
25 to 50	15%
50 to 99	17%
100 to 249	10%
250 to 499	17%
500 or more	23%
Years in Business	
Less than 5 years	6%
5 to less than 10 yrs	6%
10 to less than 20 yrs	14%
20 to less than 30 yrs	20%
30 years or more	54%
Total Annual Revenue	
Less than \$5M	25%
\$5M to under \$10M	15%
\$10M to under \$50M	21%
\$50M to under \$100M	6%
\$100M to under \$500M	17%
\$500M or more	13%
Not for profit	2%
Firm bought/merged/ been acquired/spun off within past year	
Yes	27%
No	54%
Not applicable	19%

Note: Other business classifications include engineering, consulting, service firms, and multiple classifications.

\$ directed toward construction projects: over past three years	
Up to \$10M	35%
\$10M to under \$100M	29%
\$100M to under \$500M	19%
\$500M or more	17%
Over next three years	
Up to \$10M	37%
\$10M to under \$100M	21%
\$100M to under \$500M	25%
\$500M or more	17%

Current Capabilities

Member firms are more technologically advanced than clients.

- Almost all member firms have basic e-technology capabilities including e-mail, Internet access, and facsimile.
- Internet access and e-mail are also the most common capabilities among clients of SMPS members. However, a greater percent of SMPS members have these basic technology capabilities compared to their clients.
- Clients are less technologically connected than SMPS member firms that serve them. However, three capabilities are available to a significantly greater percent of clients than SMPS members. These capabilities are: satellite/cable TV, video conferencing, and smart boards.

Percent Who Have Each Capability

	SMPS Members	Clients
COMMUNICATIONS	55%	55%
E-mail	100%	92%
Facsimile	99%	87%
Internet access	99%	92%
Cell phone	96%	87%
Web site	94%	90%
Telephone conferencing	94%	87%
Intranet	72%	67%
T1/Frame Relay Network	47%	38%
PDA	47%	38%
Pager (alpha/numeric)	44%	46%
DSL/Cable modem	38%	40%
ISDN	20%	19%
Digital pager	20%	23%
Video conferencing	19%	23%
Virtual Private Network	11%	10%
WORK RELATED	35%	33%
Scanner	94%	88%
Graphic capabilities	94%	81%
Computer network (internal)	79%	79%
Database management software	79%	73%
Project management software	70%	63%
Customer relationship mgmt software	40%	29%
Project collaboration web sites	34%	25%
Virtual office	32%	31%
Extranet	31%	33%
Web cam	10%	12%
PRESENTATION	10%	12%
Computer/video projector	72%	62%
Flash animation	31%	25%
Animation/virtual tour	17%	15%
Streaming audio/video	15%	17%
Listserve/message boards	13%	15%
Smart boards	13%	23%
Satellite/Cable TV	9%	23%

Note: Multiple responses.

Some technologies are more prevalent in a specific industry.

- 94% of SMPS members have a web site that is either operational or under construction.
- Engineering firms are most likely to have a web site.
- Scanner and graphic capabilities, however, are more common among architectural firms compared to either engineering or construction firms.
- The following identifies the industry where each capability is available with the greatest frequency.

Type of Member Firm With The Greatest Use of Each Capability

<u>Architectural</u>	<u>Engineering</u>	<u>Construction</u>
<ul style="list-style-type: none"> ▪ Flash animation ▪ Animation/virtual tours ▪ DSL/cable modem ▪ Scanner ▪ Graphic capabilities ▪ Extranet 	<ul style="list-style-type: none"> ▪ Intranet ▪ Web site ▪ Audio/video streaming ▪ Listserv/message boards ▪ Computer network (internal) ▪ T1/Frame Relay Network ▪ Virtual Private Network ▪ Video conferencing ▪ Telephone conferencing ▪ Virtual office ▪ Extranet 	<ul style="list-style-type: none"> ▪ Web cam ▪ Satellite/cable TV ▪ Computer/video projector ▪ Pager (alpha/numeric) ▪ Digital pager ▪ PDA ▪ Cell phones ▪ Project management software ▪ Project collaboration web sites ▪ Database management software ▪ CRM software ▪ ISDN ▪ Virtual office

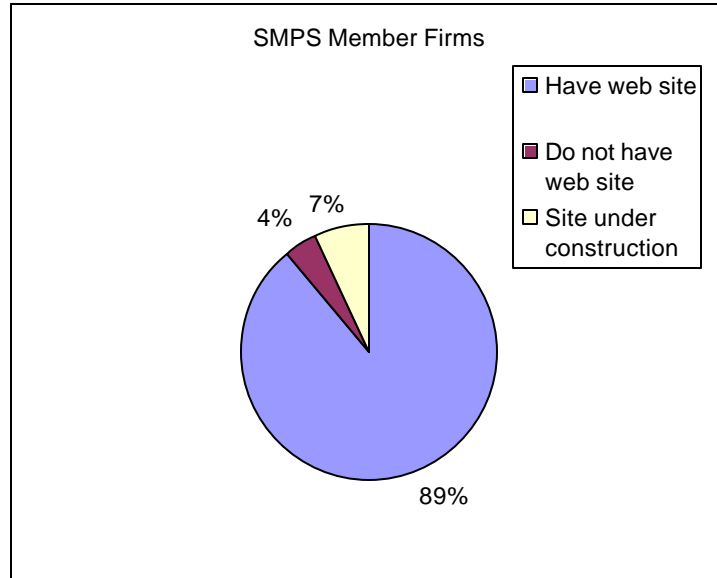
Note: Internet access, e-mail, and facsimile capabilities are similar across industries.

- Overall, satellite/cable TV, web cam, and Virtual Private Network (VPN) are the least common capabilities.
- Web cams are used with a greater frequency among construction firms than either architectural or engineering firms.
- Construction firms also rely more on pagers than either architectural or engineering firms.
- Organizations with 250 employees or more and an annual revenue of more than \$50 million are more likely to have capabilities such as Intranet, virtual office, project management software, CRM software, and PDA to name a few.

Web Sites

Approximately nine out of ten SMPS member firms have a web site.

- Approximately nine out of ten member firms have a web site that is up and running.
- Additionally, 7% indicated their company web site is under construction.
- Those without a web site tend to be smaller organizations (under 50 employees) and/or younger companies (in business less than 10 years).



Web sites are predominately used to provide information.

- The primary function of the company web site is to provide information. Nine out of ten firms provide information via their web site.
- Employee recruitment is the second most common function of the web site. Larger and more established firms (250 employees or more and in business 30 years or more) are more likely to recruit employees via the web compared to smaller companies.
- Half of all respondents use their web site to post and update projects. However, construction firms tend to use this capability more than either engineering or architectural firms.
- Billing and payment systems are not typical functions available on A/E/C (architectural/engineering/construction) firm web sites. These features are only offered by 2% of member firms.

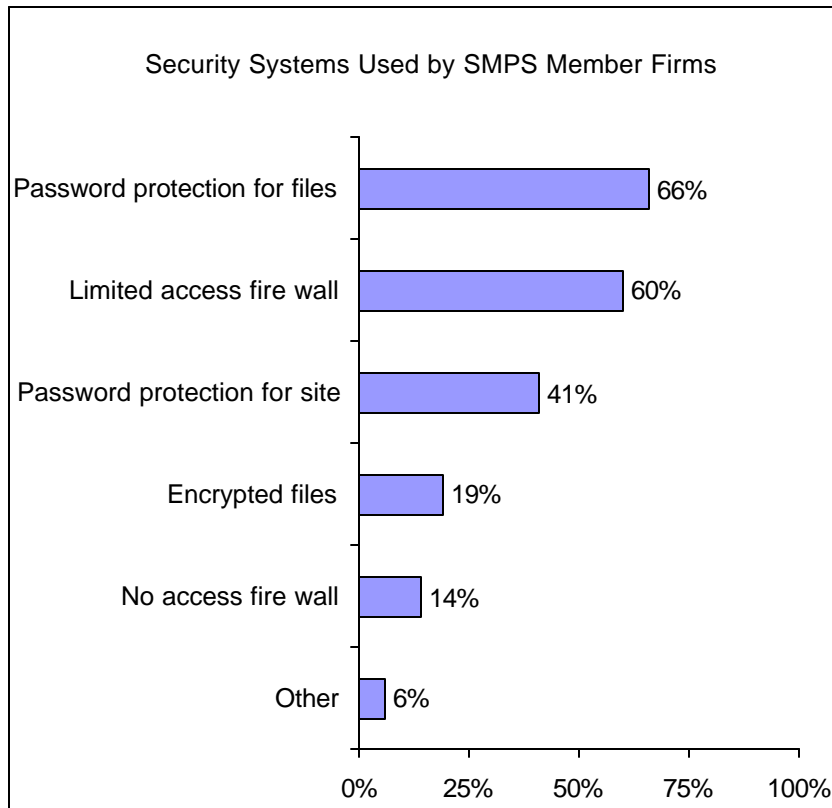
Most Common A/E/C Web Site Functions

	Architectural	Engineering	Construction
Base	109	165	81
Provide information only/do not sell	93%	91%	88%
Recruit employees	79%	88%	73%
Post and update project	49%	47%	60%
Introduce/offer <i>all</i> products/services	36%	49%	46%
Project plan delivery	6%	9%	12%
Sell <i>some</i> products/services	3%	5%	6%

Security Systems

Most member firms have, at a minimum, basic security system(s) in place.

- Two-thirds of SMPS member firms use password protection for files as a security measure. Larger firms (250 employees or more) are most likely to use password protection for files.



- Further, as expected, larger firms use more security measures than smaller firms.
- More than one-third of members use only one type of security system.

Note: Multiple responses.

Software

Specialized computer software is frequently industry specific.

- Computer Aided Drafting/Design (CAD) software is the most frequently used. Almost all engineering and architectural firms have this software. Further, almost six in ten construction firms use CAD.
- Specialized software is often industry specific. For example, construction firms use project scheduling and project management software with the greatest frequency. 3-D Model/Animation is used with the greatest frequency by architectural firms
- Web-hosted project collaboration is one specialized software that is used with similar frequency across all three industries.

Specialized Software Used by Industry

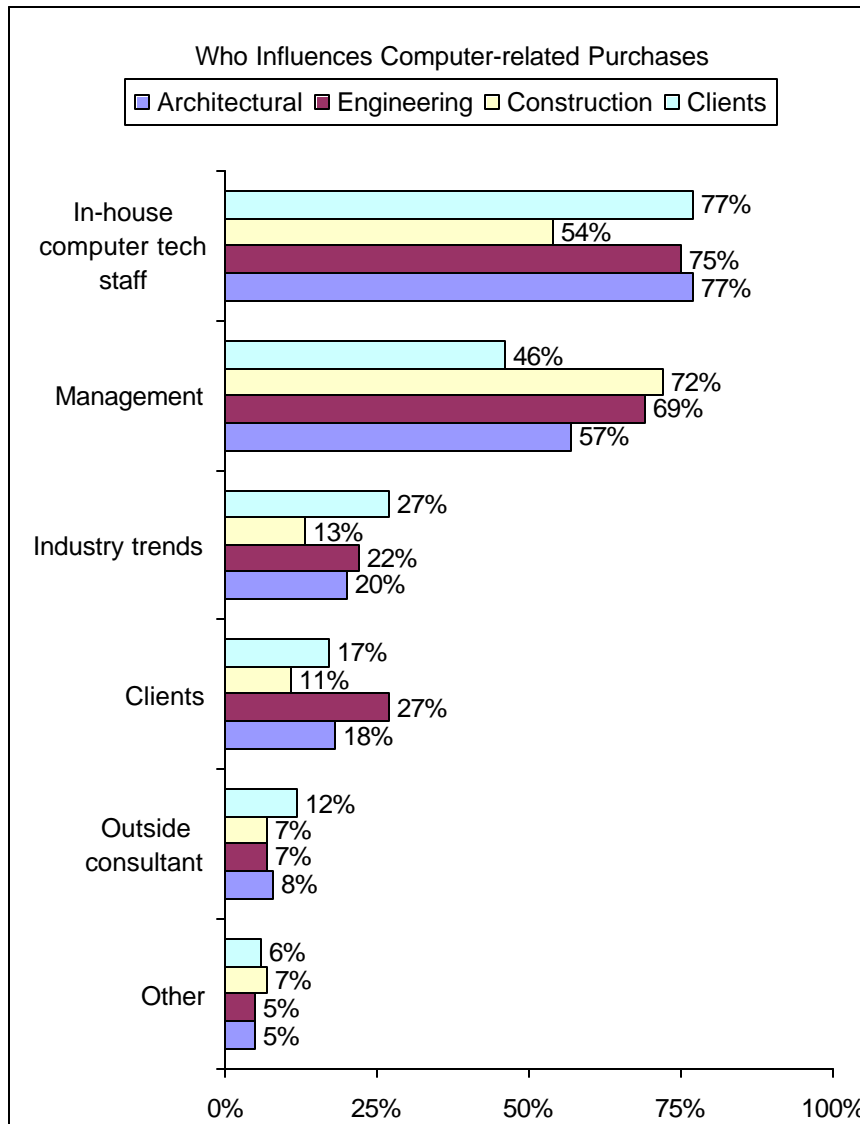
	Architectural	Engineering	Construction
Base	120	175	90
Computer Aided Drafting/Design	98%	99%	57%
Project scheduling	69%	72%	91%
Project management	64%	67%	86%
3-D Model/Animation	79%	52%	11%
Web-hosted project collaboration	30%	27%	30%

Note: Percents in bold indicate highest frequency for each type of software.

Computer-related Purchase Decisions

Computer-related purchases are typically made internally.

- In-house computer technology staff and management have the greatest influence on the purchase of hardware and software used by member firms.
- The in-house technology staff has the most influence in architectural and engineering firms, while management is most influential in construction firms.
- In-house technology staff is also most influential among client firms.



Note: Multiple responses.

- Industry trends also influence the computer related purchases of approximately two in ten member firms. Construction firms are least influenced by industry trends. Industry trends appear to have more influence among client firms compared to member firms.

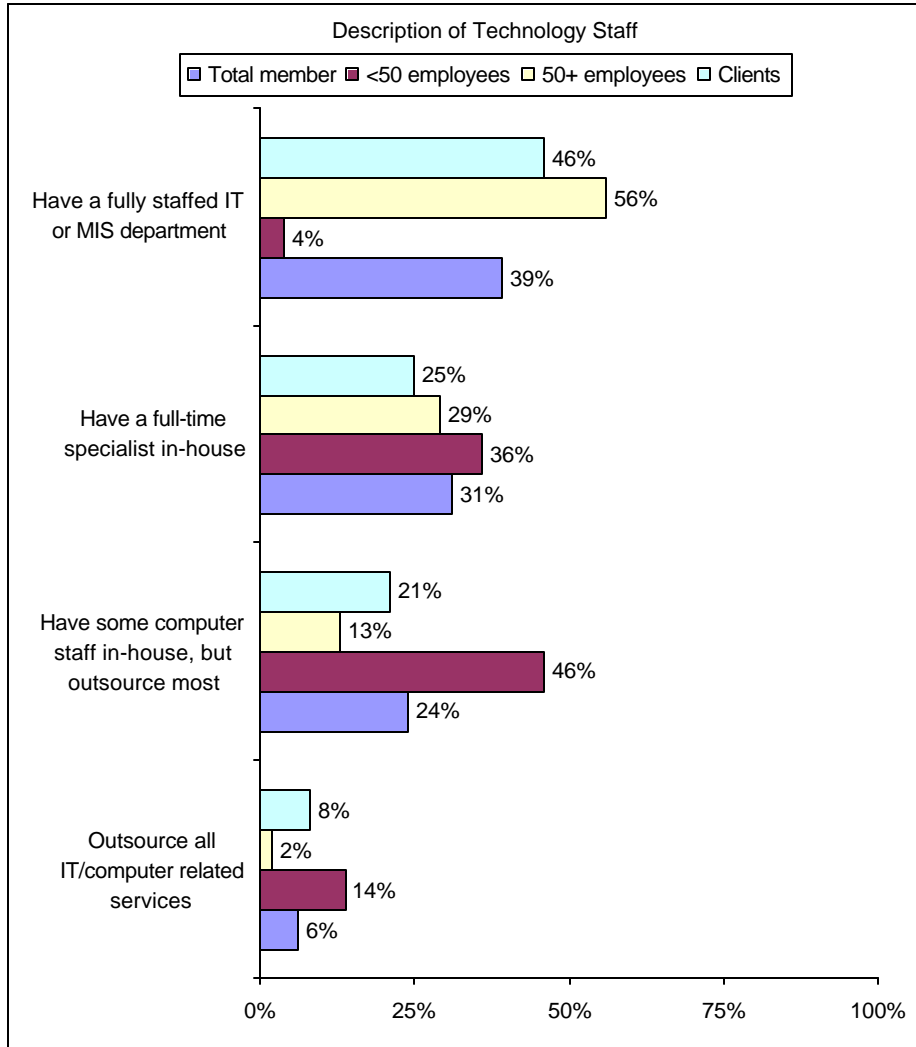
Compatibility problems exist despite client input.

- Clients have an influence on computer related purchases for approximately two in ten member firms. Engineering firms are comparatively more responsive to client influence than either architectural or construction firms.
- Despite this finding, compatibility problems are similar across industries. Engineering firms are no less likely to encounter compatibility problems with clients than architectural or construction firms.

Technology Staff

Technology staff outsourcing is a function of firm size.

- Most firms, both member and client, have either a full-time in-house technology specialist or a fully staffed IT or MIS department.
- Engineering firms are most apt to have a fully staffed technology department. This may be a factor of size as most engineering firms are large.



- 60% of small firms (less than 50 employees) outsource some or all computer-related services.

Web Use

Business Purposes

Companies use the web for information more than any other purpose.

- SMPS members use the web for a variety of business purposes. Researching competitors and accessing industry-related newsletters and articles are the most common uses.
- Researching industry trends and searching for suppliers, vendors or consultants follow, with more than seven in ten using the web for these purposes.

Use of Web for Business Purposes

	SMPS Members	Clients
Research competitors	88%	48%
Access industry newsletters/articles	83%	77%
Research industry trends	76%	67%
Search for suppliers, vendors, consultants	72%	69%
Locate customers/potential clients	64%	46%
Participate in industry forums	28%	29%
Communicate via message boards, forums, etc.	23%	37%

- Large companies (250 employees or more) are less inclined than smaller firms (less than 50 employees) to access the web in search for suppliers, vendors, or consultants. These companies may have established suppliers and, therefore, less need to search the web for this information.
- As would be expected, heavy web users (on the web six hours or more per week) devote more time to all business uses of the web. However, most noticeable is the proportionately larger percent (85%) that spend time researching industry trends compared to those who are on the web less frequently (68%).
- Heavy web users also spend more time than light users in locating customers and potential clients on the web (74% vs. 56%). Overall, almost two-thirds of members use the web for locating customers/potential clients.
- Members would likely appreciate industry links and access to industry related newsletters/articles through the SMPS web site. These features would enhance the site and help members use the web more efficiently for business.
- Members also use the web to search for, monitor, and download RFPs/RFQs.

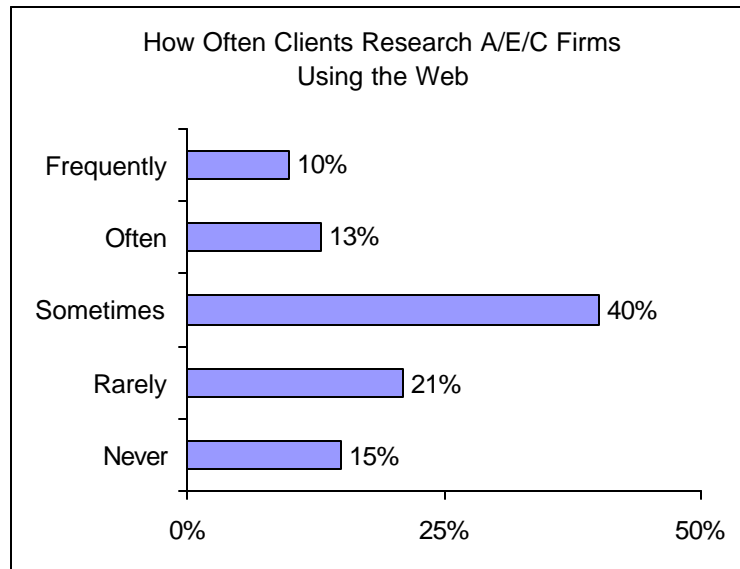
The web offers members many opportunities to reach potential clients.

- Clients primarily use the web to access industry newsletters and articles, search for vendors, and research industry trends.
- Clients of member firms are more inclined to communicate via message boards and forums than members themselves. Forums and message boards, therefore, may be good sources for locating prospective clients and building relationships.

Frequency of Web Use

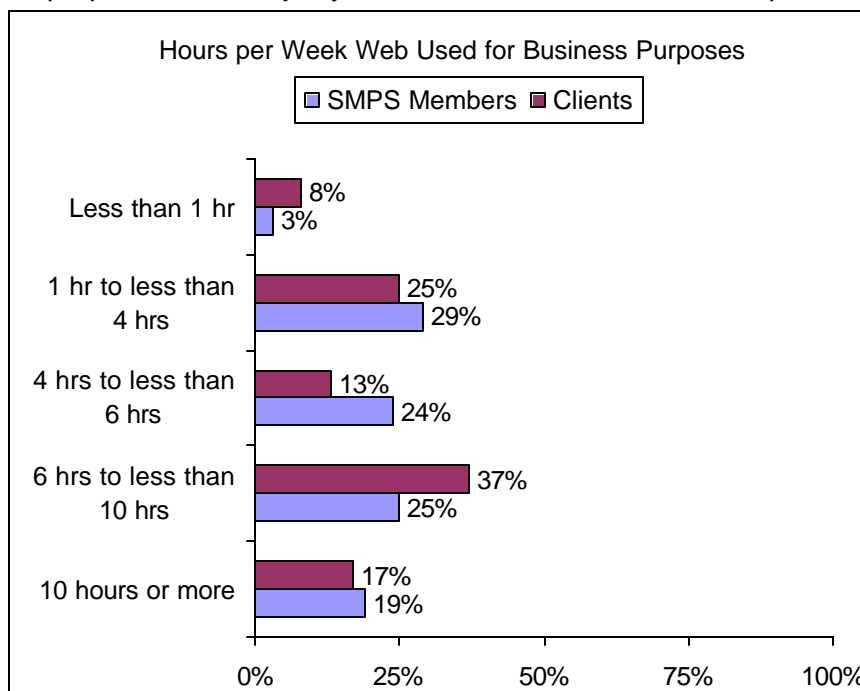
Most clients use the web to some degree to research A/E/C firms.

- Clients were asked how often they research A/E/C firms using the web. More than six in ten indicated they perform research at least sometimes and only 15% stated they never research A/E/C firms via the web.



Most members and clients use the web at least one hour per week for business purposes.

- Overall, members and clients average similar hours per week using the web for business purposes. The majority use the web less than 10 hours per week. Among members, those



employed with younger firms (in business fewer than 5 years) tend to spend more hours on the web for business compared to those working for firms that have been in business for 30 years or more.

Finding Web Sites

Recommendations are as important as hyperlinks to web pages in getting people to visit a site.

- Recommendations from business associates and friends are the primary way both SMPS members and their clients find out about new business-related web sites. Following hyperlinks from other web pages is also a popular means for finding new sites.
- Internet search engines are used to find sites by more than seven in ten SMPS members and more than six in ten clients.

How Members and Clients Find Business-Related Web Sites

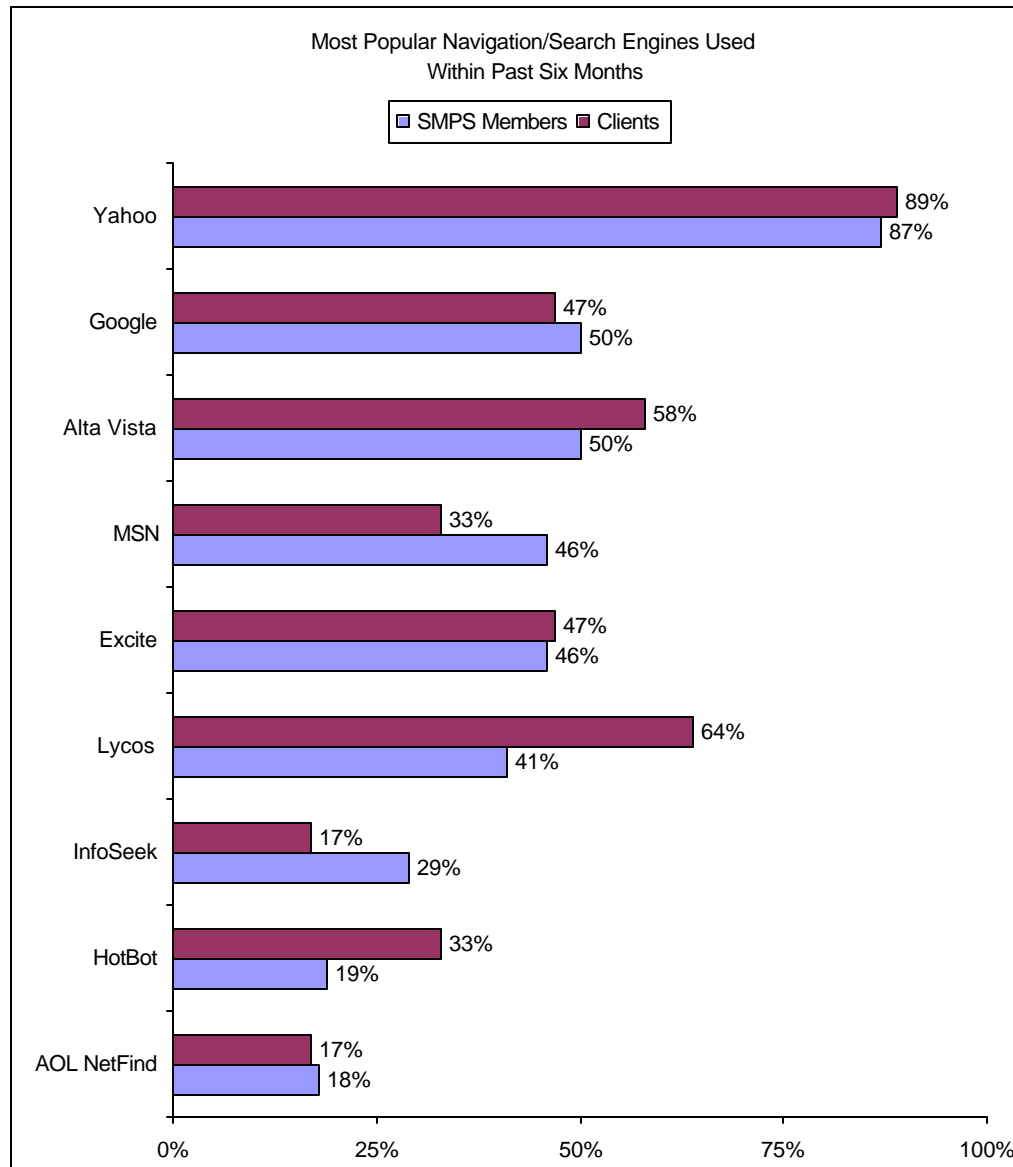
	SMPS Members	Clients
Recommendation	81%	79%
Follow hyperlinks	80%	77%
Internet search engine	72%	62%
Magazines/newspapers	68%	69%
Internet directory	42%	40%
E-mail signatures	35%	25%
Books	16%	12%
Television ads	9%	10%
Usenet news group	5%	13%

Note: Multiple responses.

Navigation/Search Services Used

Yahoo dominates the navigation/search services used by both members and clients.

- Almost nine in ten SMPS members who have accessed Internet directories or search engines within the past six months have used Yahoo.
- Alta Vista and Google were each used by half of members within the past six months. Other frequently used navigation/search services include Excite, MSN, and Lycos.
- Lycos is comparatively more popular among clients than members.



Note: Multiple responses. Member base = 379 and client base = 36

How Effectively Member Firms Use Web

Member firms are most effective in using the web to communicate with customers/clients.

- Overall, many members believe their company or organization could do a better job using the web to their benefit.
- Members feel their firms are most effective in using the web to communicate with customers and clients. However, almost half do not believe their company or organization uses the web effectively in training and development.
- Larger firms (250 employees or more) tend to have more confidence that their organization uses the web effectively to streamline internal operations compared to smaller firms.
- Larger companies also believe more strongly that their firm uses the web effectively in training and development compared to smaller firms.

Level of Agreement With Statements Concerning
SMPS Member Firm's Use of the Web

Statement	Mean Rating*	% Agree	% Disagree
The organization I work for uses the web effectively...			
...to market to/look for customers	3.1	46%	37%
...to streamline internal operations	3.1	44%	35%
...to communicate with customers/clients	3.7	68%	21%
...in training and development	2.6	31%	47%

*Mean level of agreement based on a scale where 1=strongly disagree and 5=strongly agree.

- Clearly, member firms acknowledge the benefits of the web in doing business. Many also realize the full potential of the web is not being realized in many areas of their organization. This presents an opportunity for SMPS to help members get the most out of the web to enhance and grow their business.
- Firms that have merged with, been acquired by, or spun off from another company are more confident that their organization uses the web effectively, particularly to streamline internal operations and in training and development, compared to those who are employed by firms that have not gone through consolidation.
- Members who have a high level of satisfaction with their own e-technology skills are inclined to have more confidence that their organization uses the web effectively, compared to those who are dissatisfied with their personal e-technology skills.

Web Site Design

Information

Contact information is the most critical item to include in a web site.

- Clients and members agree that basic contact information; including telephone number and e-mail address should be included in an A/E/C web site.
- A basic brochure and current project information are also key components.
- Member perceptions of what should be included in their web sites line up fairly well with client expectations. Members, however, place more importance on industry links than clients do (59% vs. 40%).
- Further, clients place more emphasis on client lists, bidding and selection information, and pricing information compared to member firms. Areas where client expectations exceed what members expect in a web site include the following.

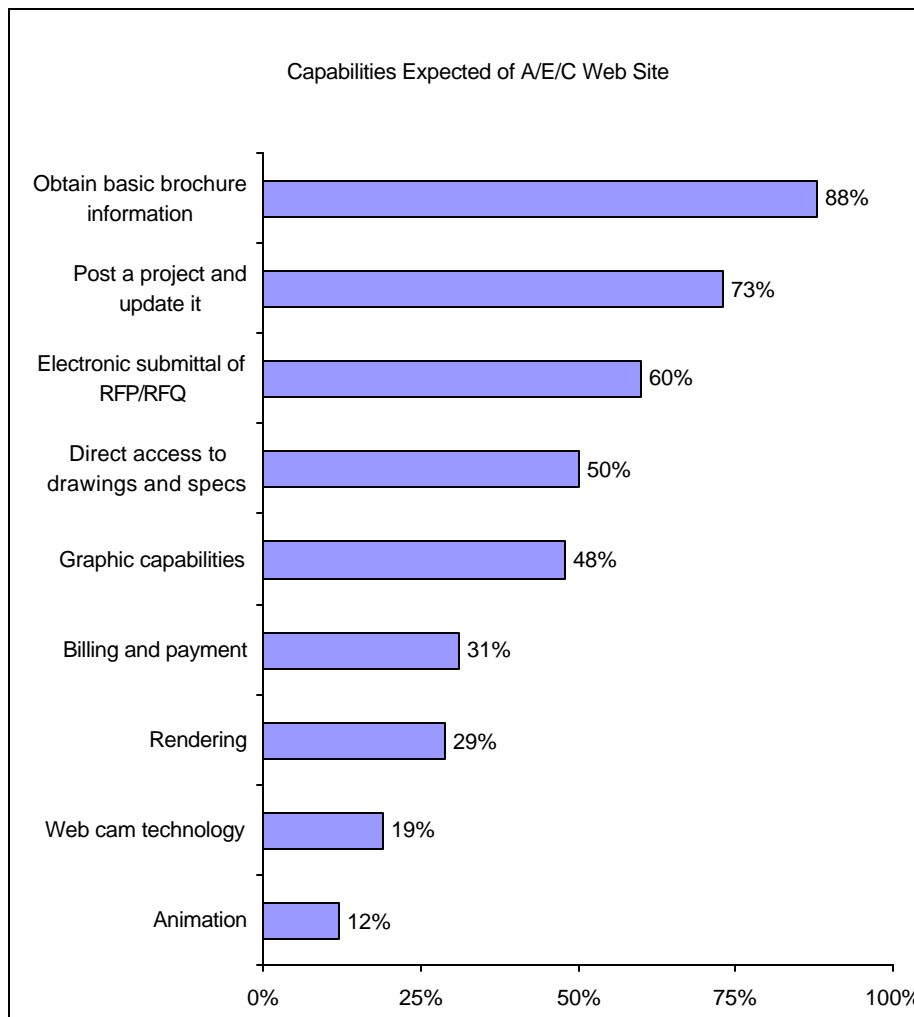
Information to Include in an A/E/C Web Site

	SMPS Members	Clients
Telephone number	99%	92%
E-mail contact information	98%	90%
Basic brochure information	99%	88%
Current project information	87%	87%
Geographic location	95%	81%
Detailed information about company	64%	69%
Client list	50%	60%
Frequently asked questions	46%	42%
Industry links	59%	40%
Bidding and selection information	23%	37%
Question and answer forum	33%	29%
Pricing information	2%	13%

Capabilities

Member firms would be wise to enhance their web sites to better serve clients.

- In terms of capabilities, clients expect of an A/E/C web site, access to basic brochure information that outlines general capabilities of the firm was the top mentioned response. The top response from clients, in terms of capabilities, was that clients expect A/E/C web sites to outline general capabilities of the firm.
- More than seven out of ten clients expect an A/E/C firm to be able to post a project on a web site and update it. However, as previously noted, only half of member firms currently have this capability.



- Further, more than three in ten clients want to be able to access billing and make payment via the A/E/C firm web site. Currently, only 2% of member firms offer this capability.
- Clearly, there are many web site capabilities A/E/C firms can add or improve upon to meet the expectations of their clients and facilitate a client focused business relationship using e-technology.

- Some firms have taken a proactive approach by adding capabilities, as indicated by the following member comments.

“Our project collaboration is done through our own web site. This allows subs and clients from all areas of the country to respond to critical information.”

“We are considering a worksheet that will help a prospect get an approximate idea of what an upcoming job might cost.”

Importance of Various Aspects of an A/E/C Web Site

Beyond basic brochure information, contact and project information are critical.

- Clients were asked to rate the level of importance they place on seventeen possible attributes of an A/E/C firm web site. Information about the company rated highest in terms of importance. Availability of contact information followed.
- The following table shows the rank order of attributes in terms of importance to clients when accessing an A/E/C web site.
- Automatic billing and payment ranked least important. However, more than three out of ten clients rated this feature as either somewhat or very important.

Importance of an A/E/C Firm Web Site Attributes

Attribute	Mean Rating*	% Very Important
Information about the company	4.6	71%
Availability of contact information	4.3	48%
Current project information	4.2	42%
Information about products	3.9	40%
Project photographs	3.9	37%
Access to projects	3.9	31%
Client list	3.9	27%
Employee profiles	3.5	23%
RFP/RFQ submittal	3.5	13%
Bidding and selection	3.2	8%
Rendering and animation capabilities	3.2	6%
Industry links	3.0	10%
Interactive web site	3.0	2%
Pricing information	2.8	10%
Virtual tour	2.8	6%
Question and answer forum	2.8	4%
Automatic billing and payment	2.5	4%

*Mean level of importance based on a scale where 1=not at all important and 5=very important.

Visual Appeal of Web Site

The visual appeal of an A/E/C web site reflects the company's professionalism and image.

- The visual appeal of an A/E/C web site is important in enticing potential clients to look further into a company.
- Seven in ten clients who have researched A/E/C firms on the web agree that the visual appeal of a web site is important in their decision to look further at an organization.
- Further, more than three out of four agree that a web site is an accurate reflection of the professionalism and image of an organization.

Client Agreement with Statements about A/E/C Web Sites

Statement	Mean Level of Agreement*	% Agree	% Disagree
Visual appeal is important in the decision to look further	3.6	70%	20%
Web site content is more important than visual appeal	3.6	59%	16%
A web site is an accurate reflection of the professionalism and image of an organization	3.9	77%	16%

*Mean level of agreement based on a scale where 1=strongly disagree and 5=strongly agree.
Note: Base=44

A/E/C web sites should be visually appealing, yet easy to navigate and professionally presented.

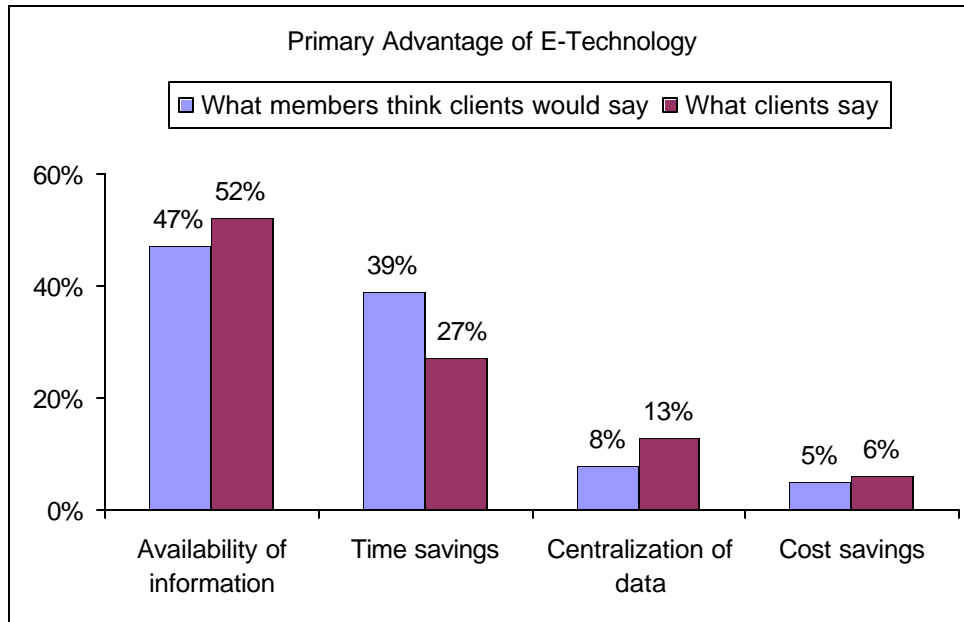
- In response to an open-ended question, clients commented that they dislike web sites that are slow loading, contain outdated information, and are difficult to navigate.
- Some clients do not want "flashy" web sites. Too much animation was referred to by one client as "gimmicky." Further, clients want relevant information that is detailed yet concise.

Member/Client Perceptions

Advantages of E-Technology

The availability of information is perceived to be the primary advantage of e-technology.

- Overall, almost half of SMPS members believe their clients would say the greatest advantage of e-technology is the availability of information. More than half of clients confirmed this perception.



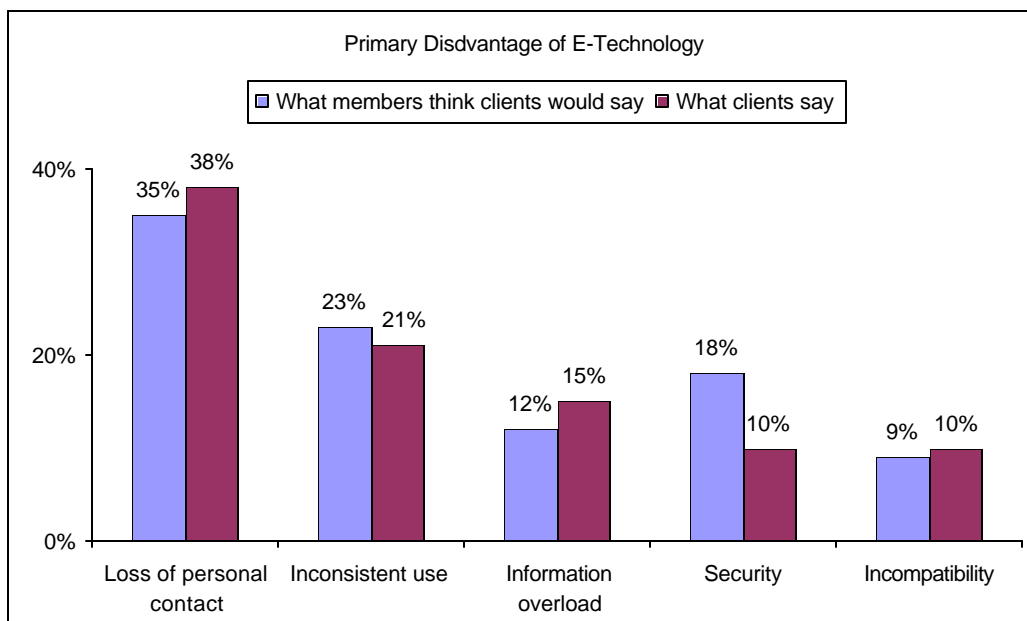
- Cost savings does not appear to be a driving force according to both members and clients.

- SMPS members are in sync with their assumptions about what clients think is the primary advantage of e-technology. However, members overestimate the time savings component.
- Large firms (250 employees or more) believe their clients are comparatively less focused on time savings and more focused on information and centralization of data compared to smaller firms.

Disadvantages of E-technology

Loss of personal contact is believed to be the primary disadvantage of e-technology.

- SMPS members are also on target with perceptions of their clients regarding the primary *dis*advantage of e-technology.
- Almost four in ten clients cited loss of personal contact as the primary disadvantage. 35% of SMPS members believed this to be the perception of their clients.
- The issue of personal contact is important as e-technology flourishes. Companies would benefit by integrating personal contact into e-technology solutions to best serve their clients. The message clients appear to be sending is that member advancements in e-technology should not be at the expense of personal contact with clients.

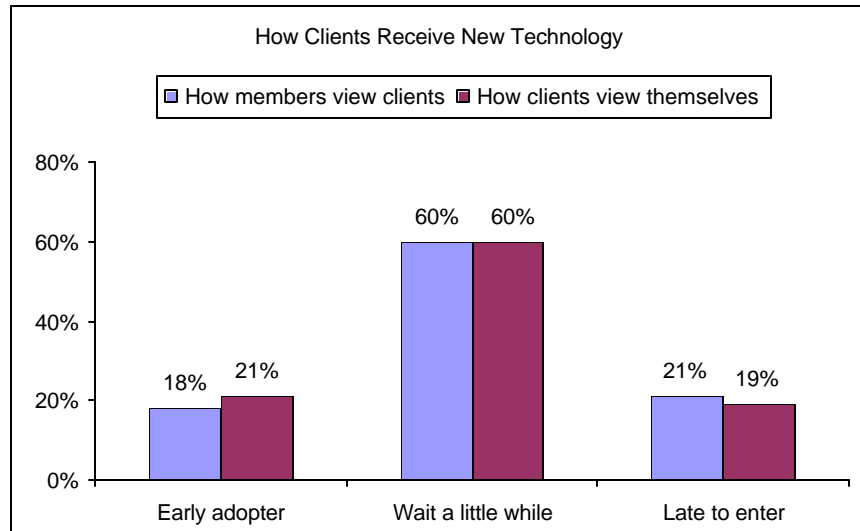


- Interestingly, a greater percent of SMPS members believe their clients would say security is the primary disadvantage of e-technology, compared to the percent of clients who actually hold this belief.

Client Reception to New Technology

Clients are not early adapters.

- Six out of ten SMPS members would categorize their clients as those who “wait a little while for the technology to mature and become more affordable before adopting a new technology”, as opposed to early adopters or late adopters of new technology.
- SMPS members have a handle on their clients regarding receptivity of new technology. Six out of ten clients define themselves exactly as SMPS members perceive them.



E-technology Skills of A/E/C Firms

Clients are less satisfied than members perceive they are.

- Members have more favorable views of the e-technology skills their firms deliver than their clients have of them.
- SMPS members are likely overestimating the value of technology they deliver by not aligning with client expectations.
- Large firms (250 or more employees) are more confident in the e-technology skills they deliver compared to smaller firms.



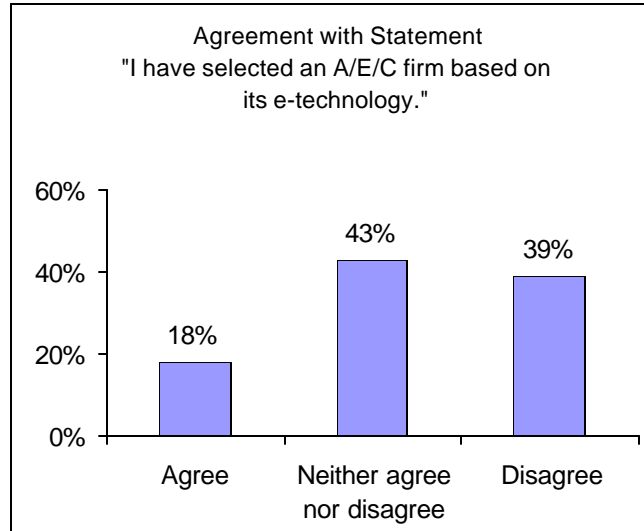
- Clients were asked to explain what areas they would like A/E/C firms to improve upon with regard to e-technology. Responses primarily focused on better facilitation of communication and better software compatibility. Following are representative comments from clients.

“Better compatibility and standard software for marketing materials to enhance teaming/joint proposals.”

“I would like more staff at the architect’s office to have dedicated mailboxes so that I could e-mail them directly...”

Most clients acknowledge they don't select an A/E/C firm based on e-technology.

- Only 18% agree with the statement, "I have selected an A/E/C company based on its e-technology." E-technology likely plays an important role, but is not the sole determining factor in selecting an A/E/C firm.



Areas Where A/E/C Firms Can Improve

E-technology training must go hand-in-hand with e-technology advancements.

- Members were asked where their company needs to improve from the point of view of their clients. A wide array of comments was provided. However, some recurring themes are evident and point to key areas of concern among SMPS members. These issues include:
 - ✓ employee training in e-technology
 - ✓ availability of project information via web site
 - ✓ improved communication with clients
 - ✓ better and more up-to-date web site
 - ✓ faster response time
- Several members commented on the fact that employee skills and knowledge of e-technology are often inconsistent or lacking altogether. Further, availability of e-technology does not always translate into expertise.

“We all need more training to keep up with changes in technology. We have the technology, but half of the time, we don’t know how to get the best use out of it.”

- Another SMPS member offered the opinion that member firms should be pro-active and maintain a level of e-technology that stays ahead in order to respond to client needs.

“I don’t think that our clients are setting the bar for what we deliver. Rather, we must constantly improve and better what we are delivering progressively to maintain a level of satisfaction.”

Member firms should devote the time and resources necessary to create and maintain a superb web site.

- Having the time and ability to keep web sites up-to-date appears to be a common problem, as well. Members believe, and client responses indicate, that clients would like more information and better access to project information via the web site. This involves not only taking the time to update the web site on a regular basis, but also having more capabilities available, such as:
 - ✓ project collaboration
 - ✓ web-based project management
 - ✓ integrated web sites
 - ✓ projects links

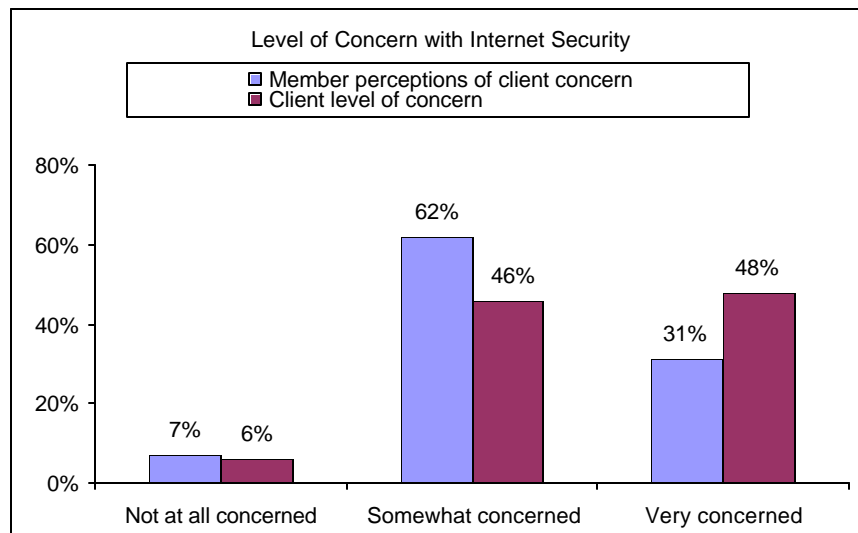
“Keeping our web site current is difficult because it’s on an ‘it can wait’ list as opposed to deadlines which are non-negotiable. I would like to provide our clients, as well as our staff, more updated information on a regular basis.”

“We need to be able to create project web sites for an interactive exchange of project information between our firm and our client...”

Concern with Internet Security

Internet security remains an issue among clients.

- While security may not be the *primary* concern among clients, there is a fear factor concerning security and the Internet. Almost half of clients (48%) stated they are very concerned about security on the Internet. Only 6% are not at all concerned.
- SMPS members tend to downplay this concern. Only three in ten members acknowledged that their clients are very concerned about security on the Internet. The majority (62%) believe their clients are just somewhat concerned.
- Acknowledging this concern and taking measures to address and ensure client security will benefit the member/client relationship and help build successful e-technology solutions in conducting business.



Client Selection Criteria

Expertise and responsive service rank at the top in terms of criteria for selecting an A/E/C firm.

- Top ranking considerations include expertise in a specialized area and responsive service. Previous positive relationship also ranks near the top of the list.

Criteria	Rank
Expertise in a specialized area	1
Responsive service	2
Previous positive relationship	3
Design talent	4
Staffing capacity	5
Broad range of capabilities	6
Innovation	7
Price	8
E-technology	9
Nearby location	10
Web site	11

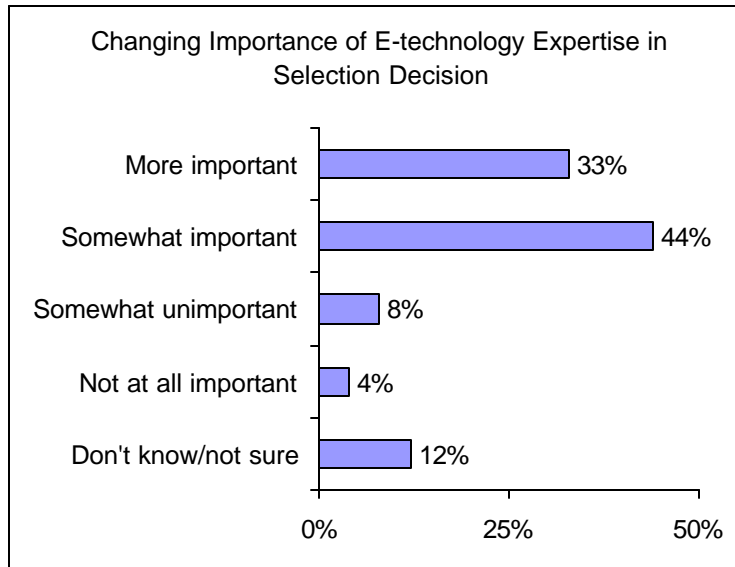
- E-technology, nearby location, and web site rank among the lowest criteria in the selection of A/E/C firms by clients.
- To confirm the lack of importance e-technology expertise has in the selection decision, 21% consider the level of importance of e-technology expertise to be more than 25%, with only 11% assigning e-technology expertise a more than 50% level of importance.

Importance of E-technology Expertise in Selection Decision

Level of importance	% Placing on E-technology expertise
0% to 10% importance	37%
11% to 25% importance	42%
26% to 50% importance	10%
More than 50% importance	11%

E-technology is becoming, and will become, more important in the selection decision as time goes on.

- It also appears that e-technology expertise is increasing in importance in the selection process and probably will continue to do so as e-technology flourishes.
- One-third of clients responding feel e-technology expertise is becoming more important in their selection process and 44% see e-technology expertise as becoming somewhat more important.



- Clients recognize the importance of e-technology in the A/E/C industry and will likely alter their selection standards accordingly over time.

Personal Satisfaction with E-technology Skills

Satisfaction with personal e-technology skills appears to be a function of firm size.

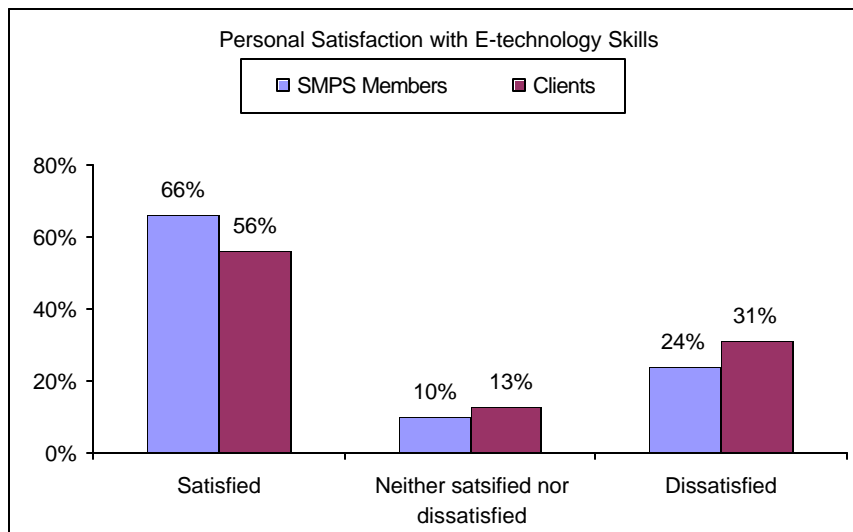
- SMPS members employed with larger firms (250 employees or more) are more satisfied with their own personal e-technology skills compared to those with smaller firms. This may be a direct reflection of the fact that larger firms have the resources to invest in more technological capabilities and training compared to their smaller counterparts.
- Interestingly, employees with mid-size firms (50 to 249 employees) are least satisfied with their e-technology skills. These individuals may have higher expectations than employees of small firms, yet are disappointed when their training and e-technology capabilities fall short compared to larger competitors.

Member Satisfaction with Personal E-technology Skills

Number of employees	Mean Satisfaction*	% Satisfied	% Dissatisfied
Less than 50	3.5	61%	25%
50 to 249	3.4	59%	31%
250 or more	3.8	77%	16%

*Mean satisfaction based on a scale where 1=very dissatisfied and 5=very satisfied.

- Clients are less satisfied with their personal e-technology skills compared to SMPS members. This is also important to keep in mind when dealing with clients. It is important to assess and establish a comfort level with clients when e-technology is involved in the business relationship.



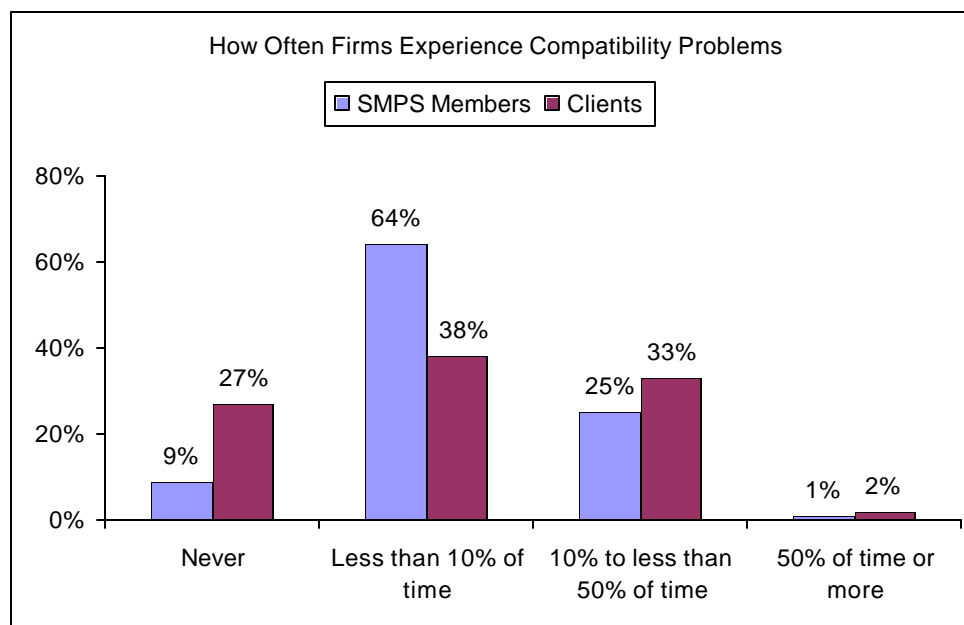
- Member firms typically have more capabilities and more sophisticated e-technology capabilities compared to their clients, which may explain the variance in satisfaction levels.

Challenges and Strategies Facing Organizations

Compatibility Problems

Compatibility problems affect most members firms, with software-related incompatibility being the most common.

- Clients report fewer incidences of compatibility problems than SMPS members. More than one in four clients (27%) have never experienced compatibility problems when communicating with A/E/C firms.
- Looking at members, however, one gets a different picture of the challenges involved in technological compatibility. More than 90% have experienced compatibility problems, with more than one in four (26%) experiencing problems at least ten percent of the time.
- Perhaps this can be explained by the simple fact that member firms deal with a large number of clients, while clients tend to deal with a limited number of A/E/C firms. Clients may have worked through most compatibility problems over the course of time they have dealt with their primary suppliers.



- Still, more than one-third of clients have compatibility problems as often as ten percent of the time or more. Incompatible software or software versions were the most common compatibility problems cited by clients.

- Members also identified incompatible software as a frequent occurrence. Compatibility problems cited by members include the following.

- | | |
|--|-------------------------------------|
| √ Different software version/incompatible applications | √ Problems converting files |
| √ Systems that will not communicate with each other | √ File transfer protocol issues |
| √ Inability to transfer/download large files | √ Problems with graphic formats |
| √ Inability to read e-mail attachments | √ Mac vs. PC platform compatibility |

Greatest Single Technology Challenge

Rapidly changing technology, coupled with employee training issues, makes keeping up with technology the greatest single challenge facing firms today.

- Members in all industries view keeping up with technology as the greatest single technology challenge facing their business today. One-third of members responding hold this opinion.
- Training (including employee training and development plus retaining qualified tech employees) follows, with 21% of members and 28% of clients naming this as the greatest technology challenge facing their firm.
- Construction firms see marketing strategies using e-technology and training/development of employees as equally challenging.

Greatest Single Technology Challenge Facing Firms

	SMPS Members	Clients
Keeping up with technology	33%	38%
Training (employee training and development, finding/retaining qualified tech employees)	21%	28%
Effective marketing strategies using e-technology	19%	8%
Cost of new technology	13%	8%
Adoption of technology	9%	10%
Procuring goods/supplies through e-commerce	1%	4%

- Other than cost, there were minimal differences in perceptions between small and large size firms. Large firms (250 employees or more and annual revenue greater than \$50 million) are less inclined to see costs of new technology as a challenge compared to smaller firms.
- Clients tend to deal with similar issues and challenges. Keeping up with technology is the greatest single challenge for clients, as well. However, effective marketing strategies using e-technology poses less of a challenge to clients than members.

Top Three Technology Challenges Faced by Member vs. Client Firms

<u>SMPS Members</u>	<u>Clients</u>
✓ Keeping up with technology	✓ Keeping up with technology
✓ Training	✓ Training
✓ Effective marketing using e-technology	✓ Effective marketing strategies using e-technology

- Finding and retaining qualified technology employees appears to be a greater challenge among clients than member firms.
- Additionally, while procuring goods and supplies is comparatively less important of a challenge for clients, it is more important among clients than members. This will likely continue to be an issue as e-commerce grows in the future.

Business Strategies

Firms plan to focus on the Internet/web and strategic business alliances to grow their businesses.

- The certainty of change is evident between both member and client firms. 94% of member firms and 90% of client firms stated they would engage in any of the following growth strategies over the next year:
 - ✓ Internet/web development
 - ✓ strategic business alliance
 - ✓ investment expansion
 - ✓ outsourcing
 - ✓ joint venture
 - ✓ investments in R&D
 - ✓ merger
 - ✓ restructuring

- Internet/web development and strategic business alliances are the most common growth strategies member firms plan to pursue. Investment expansion is also a popular growth strategy and is most common among engineering firms.

Growth Strategies Within The Next Year

	SMPS Members	Clients
Strategic business alliance	60%	52%
Internet/web	60%	54%
Investment expansion	53%	46%
Joint venture	34%	27%
Re-structuring	15%	23%
Outsourcing	15%	31%
Merger	11%	12%
Investments in R&D	9%	15%
None of the above	6%	10%

- Approximately one-third of member firms plan to pursue a joint venture.
- Construction firms are more apt to use this strategy for growth than either architectural or engineering firms.
- Small firms are less likely to pursue joint ventures, mergers, strategic business alliances, restructuring, and investment expansion compared to large firms (250 employees or more).

Plans to Increase Technology

More weight is placed on equipment/software than on training.

- Most member and client firms plan to increase their level of technology over the next year in some form or another.
- The greatest investments appear to be in computer software and hardware.
- Secondly, approximately half of member firms plan to invest in training and web design.
- Construction firms plan to devote comparatively more to training than either architectural or engineering firms. Engineering firms, on the other hand, plan to focus investment to increase software technology.

Areas Where Firms Plan to Increase Technology
Top Four Responses

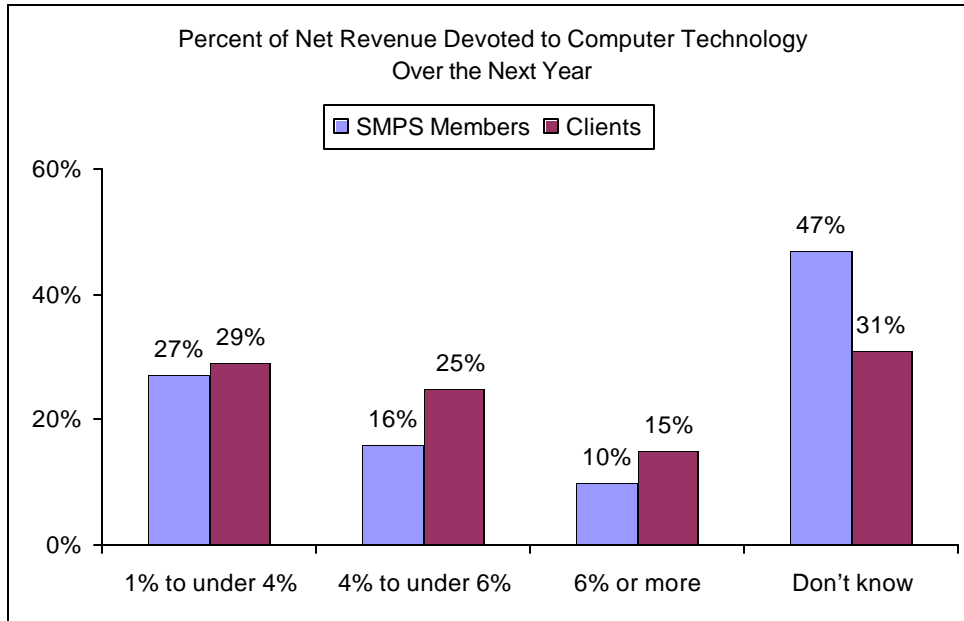
<u>Architectural</u>	<u>Engineering</u>	<u>Construction</u>
▪ Equipment/hardware (67%)	▪ Software (74%)	▪ Software (60%)
▪ Software (67%)	▪ Equipment/hardware (65%)	▪ Training (59%)
▪ Web design (50%)	▪ Training (50%)	▪ Equipment/hardware (54%)
▪ Training (43%)	▪ Web design (47%)	▪ Web design (43%)

- Interestingly, larger firms (250 employees or more) are less apt to increase technology through web design than their smaller counterparts. This may reflect the fact that most larger firms already have web sites that are up and running so investments in this area have already been allocated.
- Only two in ten member firms plan to increase their internal technology staff. Large firms (more than \$50 million in annual revenue) are more apt to invest in this area compared to smaller firms.
- Client firms have priorities similar to member firms in terms of increasing technology. Web design is less important compared to member firms, while outsourcing is an area clients will pursue at a higher level than members.
- Further, client firms place more emphasis on training compared to member firms. This may be an important area to monitor for SMPS member firms that want to stay ahead of the technology curve, especially given that member firms plan to invest most in hardware and software advancements.

Planned Increases in Technology Within The Next Year

	SMPS Members	Clients
Software	68%	69%
Equipment/hardware	65%	67%
Training	49%	65%
Web design	48%	38%
Internal technology staff	21%	25%
Outsource/contract tech staff	6%	10%
None of the above	4%	4%

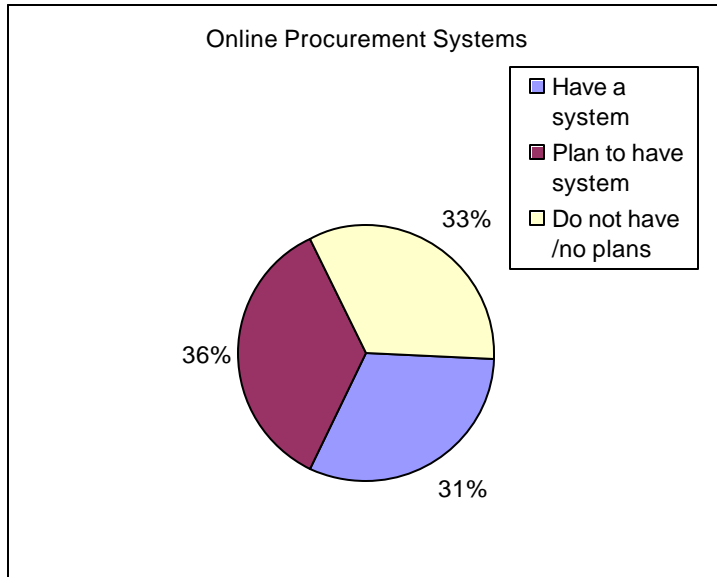
- Many respondents, both member and client, are not privy to information concerning the percent of net revenue their organization will devote to computer technology over the next year. However, based on those who were able to provide an estimate, it appears most firms will allocate less than 6% of net revenue to computer technology.



Online Procurement

An opportunity exists for A/E/C firms to work with clients in establishing online procurement systems for construction and design services.

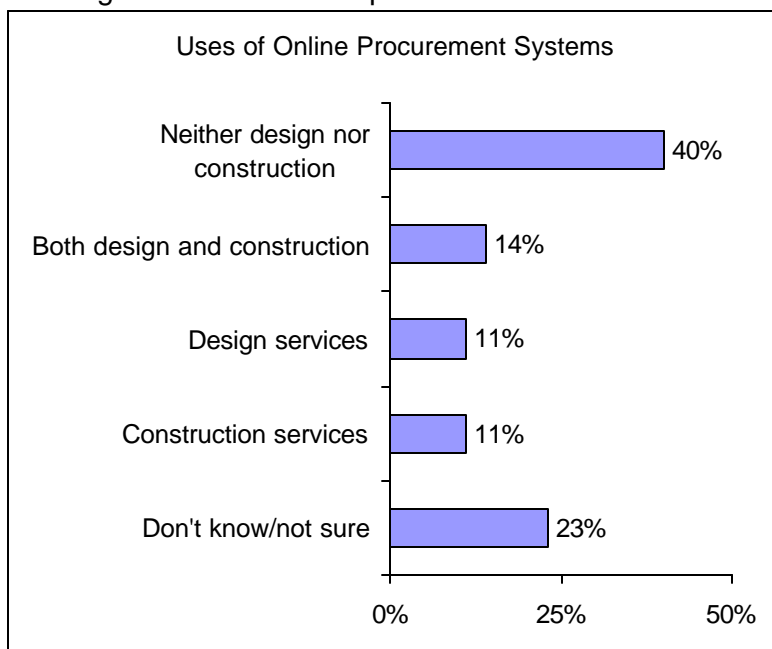
- Overall, clients plan to spend more on construction projects over the next three years compared to what they spent over the past three years.
- More than four in ten (46%) plan to spend \$100 million or more over the next three years, compared to 36% who spent at this level over the past three years.



- The trend to online procurement is evident.
- Currently, three out of ten clients have an online procurement system for goods and/or services.
- Additionally, 36% plan to implement a system sometime in the future.
- More than four out of ten clients should have a system within the next year.

- However, online procurement for design and/or construction services may lag behind other product and service categories. Among those who have or plan to have an online procurement system, only 36% apply the system to design and/or construction services.

- This presents an opportunity to member firms to work with clients who have procurement systems in place and develop an integrated system.



APPENDIX

Pre-survey Invitation

Dear SMPS Member,

The SMPS Foundation invites you to take part in a national survey of SMPS members and their clients regarding current practices, perceptions of, and plans for using electronic communication technology.

The information gathered during this landmark survey will serve as an A/E/C industry benchmark regarding technology use in professional service firms. Specifically, the results from the client survey will guide SMPS members and their firms in future technology decisions and purchases as they strive to enhance customer service.

The SMPS Foundation is funding this survey through a research grant. We have contracted with Sunbelt Research Associates, Inc. (SRA), a national market research firm, to conduct the online survey, analyze the data, and report the findings. Thus, the responses you provide will be analyzed collectively and your individual responses will remain anonymous.

Within the next five days, you will receive an e-mail requesting your participation and providing instructions on how to access the survey online. The survey should take no more than ten minutes to complete and must be completed by July 5, 2001.

You will also receive a second e-mail asking you to invite your clients to participate in the survey. To keep your clients' e-mail addresses confidential, we are asking you to forward an invitation to your clients requesting their participation in the survey. Detailed instructions will be included in this e-mail.

As a thank you for participating, SMPS will send you, and any of your clients who respond, a complimentary copy of the final report once completed. To receive a copy, respondents need to provide an e-mail address when prompted at the conclusion of the survey.

The survey and its findings will be presented during the SMPS National Marketing Conference in Orlando, Florida, August 8 – 11, 2001.

We are excited about the valuable information this research will provide all SMPS members and clients. Your participation is critical and greatly appreciated.

If you have any questions or concerns, please e-mail the SRA project analyst at tnichols@sunbeltresearch.com.

Thank you, in advance, for your time and cooperation.

Sincerely,

Lee Slade, P.E.
President, SMPS Foundation

Kienle Communications, Ltd.
Sunbelt Research Associates, Inc.

E-mail Invitations

The SMPS Foundation is requesting your participation in a national survey of SMPS members regarding current practices, perceptions, and plans for using electronic communication technology.

Sunbelt Research Associates, Inc. (SRA), a national market research firm, is conducting the online survey, analyzing the data, and reporting the findings. Thus, the responses you provide will be analyzed collectively, and your individual responses will remain anonymous.

As a thank you for participating, SMPS will send you a **complimentary copy of the report**. Simply provide your e-mail address when prompted at the end of the survey. The report will help guide you and your firm in future technology decisions to enhance customer service.

You will soon receive another e-mail asking you to invite your clients to participate in the survey. Detailed instructions will be included with this e-mail.

To participate in the SMPS member survey, click on the following link. The survey will take approximately 10 minutes to complete.

[http://www.\(memberlink\)](http://www.(memberlink))

If you have any questions or concerns, please e-mail the SRA project analyst at tnichols@sunbeltresearch.com.

Thank you for your participation!

(SMPS member: Please forward this e-mail to at least five (5) of your clients. Then e-mail the SRA project analyst with the total number of clients to whom you forwarded the e-mail. Send this total to tnichols@sunbeltresearch.com.)

The Foundation of the Society for Marketing Professional Services (SMPS) is requesting your participation in a national survey of architectural/engineering/construction clients. The survey is designed to gauge clients' expectations for, perceptions of, and experiences with the use of electronic communication technology when working with firms that provide architectural, engineering, construction, and related professional services. This research will help the A/E/C firms with whom you work to better serve you. Further, the resulting report may also be helpful to you and your firm in selecting firms and making technology decisions.

Sunbelt Research Associates, Inc. (SRA), a national market research firm, is conducting the online survey, analyzing the data, and reporting the findings. Thus, the responses you provide will be analyzed collectively, and your individual responses will remain anonymous.

As a thank you for participating, SMPS will send you a **complimentary copy of the report**. Simply provide your e-mail address when prompted at the end of the survey.

To participate in the client survey, click on the following link. The survey will take approximately 10 minutes to complete.

<http://www.clientlink>

If you have any questions or concerns, please e-mail the SRA project analyst at tnichols@sunbeltresearch.com.

Founded in 1973, SMPS has 5,000 members in 49 chapters across the United States and Canada. They are marketing and business development professionals employed by architectural, engineering, planning, interior design, construction, and specialty consulting firms. Together, they support the SMPS mission: To be the premier source for education, information, and resources in marketing professional services for the built and natural environments.

The mission of the SMPS Foundation is to promote research and education that advances the body of knowledge of professional services marketing to develop a greater understanding of the role and value of marketing in the architectural/engineering/construction industry. For additional information, please contact Foundation Liaison Lisa Jenkins at 800-292-7677, ext. 230, or e-mail lisa@smps.org.

SMPS sincerely thanks you for your participation in this landmark survey!

Follow-Up E-Mail To Members Who Responded

Thank you for your participation in the SMPS member technology survey. We have had a great response from our members and truly appreciate your participation.

We have not had the client response to date that would make the responses from SMPS clients meaningful, so we are asking for your help.

You can help us by encouraging your clients to participate before July 6, 2001. To encourage greater participation, we are presenting the following incentive to your clients:

ENTRY IN A DRAWING FOR TWO FREE NIGHTS AT A MARRIOTT PROPERTY (SUBJECT TO RESTRICTIONS)

For clients who have already participated, we will enter them into the drawing also.

If you have not already sent your clients an invitation, please forward the e-mail below the dotted line to five of your clients inviting them to participate in the research project. If you have invited them, please send them a gentle reminder that the survey is only live on the website until July 6.

Please send the total number of invitations you sent to the SRA project analyst, tnichols@sunbeltresearch.com, so an accurate response rate can be tabulated.

Thank you for your help in making this a successful project.

The Foundation of the Society for Marketing Professional Services (SMPS) is requesting your participation in a national survey of architectural/engineering/construction clients. The survey is designed to gauge clients' expectations for, perceptions of, and experiences with the use of electronic communication technology when working with firms that provide architectural, engineering, construction, and related professional services. This research will help the A/E/C firms with whom you work to better serve you. Further, the resulting report may also be helpful to you and your firm in selecting firms and making technology decisions.

Sunbelt Research Associates, Inc. (SRA), a national market research firm, is conducting the online survey, analyzing the data, and reporting the findings. Thus, the responses you provide will be analyzed collectively, and your individual responses will remain anonymous.

As a thank you for participating, SMPS will send you a **complimentary copy of the report and enter you into a drawing for TWO FREE NIGHTS AT A MARRIOTT PROPERTY (subject to restrictions)**

Simply provide your e-mail address when prompted at the end of the survey.

To participate in the client survey, click on the following link. The survey will take approximately 10 minutes to complete.

[http://www.\(clientlink\)](http://www.(clientlink))

If you have any questions or concerns, please e-mail the SRA project analyst at tnichols@sunbeltresearch.com.

Founded in 1973, SMPS has 5,000 members in 49 chapters across the United States and Canada. They are marketing and business development professionals employed by architectural, engineering, planning, interior design, construction, and specialty consulting firms. Together, they support the SMPS mission: To be the premier source for education, information, and resources in marketing professional services for the built and natural environments.

The mission of the SMPS Foundation is to promote research and education that advances the body of knowledge of professional services marketing to develop a greater understanding of the role and value of marketing in the architectural/engineering/construction industry. For additional information, please contact Foundation Liaison Lisa Jenkins at 800-292-7677, ext. 230, or e-mail lisa@smps.org.

SMPS sincerely thanks you for your participation in this landmark survey!

Member Survey

Please read each question with accompanying instructions carefully and provide your honest input.

1. Which of the following capabilities does your company/organization currently have available? (CHECK ALL THAT APPLY)
 - 1 Internet – access to the world wide web
 - 2 Intranet – staff access to corporate data
 - 3 Extranet – external with customers, vendors, or clients
 - 4 E-mail
 - 5 Web site
 - 6 Web cam
 - 7 Flash animation
 - 8 Streaming audio and/or video
 - 9 Animation/virtual tours
 - 10 Virtual office (remote staff/telecommuting)
 - 11 Listserve/message boards
 - 12 Computer network – internal office
 - 13 T1/Frame Relay Network – multiple offices
 - 14 VPN (Virtual Private Network)
 - 15 ISDN
 - 16 DSL/Cable Modem
 - 17 Satellite/Cable TV
 - 18 Video conferencing
 - 19 Telephone conferencing (speaker phone)
 - 20 Computer/video projector
 - 21 Smart boards (electronic marker board)
 - 22 Pager (alpha/numeric)
 - 23 Digital pager (eg, Blackberry)
 - 24 Personal Digital Assistant (PDA)
 - 25 Cell phones
 - 26 Scanner
 - 27 Facsimile
 - 28 Graphic capabilities (i.e., Adobe PhotoShop, etc.)
 - 29 Project management software
 - 30 Project collaboration web sites
 - 31 Database management software
 - 32 Customer relationship management software
 - 33 Other _____

2. Thinking about your entire practice, how often do you experience compatibility problems when communicating with clients? (CHECK ONE)
 - 1 Never (SKIP TO Q. 4)
 - 2 Less than 10% of the time
 - 3 10% to less than 50% of the time
 - 4 50% of the time or more

3. Please explain, in detail, the compatibility problems you experience.

4. Does your company currently have a web site?
- 1 Yes → If yes, how does your company use its web site to conduct
2 No business? (CHECK ALL THAT APPLY)
3 Under construction (SKIP TO Q.6)
- 1 Provide information only/do not sell directly via web
 - 2 Introduce/offer all products/services via web
 - 3 Sell some products/services through the web
 - 4 Make billing information available on web
 - 5 Accept payment/have payment system on web
 - 6 Post RFP or RFQ
 - 7 Bidding and selection
 - 8 Recruit employees
 - 9 Post a project on a web site
 - 10 Project plan delivery
 - 11 Other _____
5. IF NO, does your company have plans to develop a web site within the next twelve months?
- 1 Yes
2 No (SKIP TO Q.7)
3 Don't know (SKIP TO Q.7)
6. How does your company plan to use its web site to conduct business? (CHECK ALL THAT APPLY)
- 1 Provide information only/do not sell directly via web
 - 2 Sell some products/services on the web
 - 3 All products/services are available on the web
 - 4 Make billing information available on web
 - 5 Accept payment/have payment system on web
 - 6 Post RFP or RFQ
 - 7 Bidding and selection
 - 8 Recruit employees
 - 9 Post a project on a web site
 - 10 Project plan delivery
 - 11 Other _____
7. Overall, what do you believe your clients think is the primary advantage of e-technology? (CHECK ONLY ONE)
- 1 Cost savings
 - 2 Time savings
 - 3 Centralization of data
 - 4 Availability of information
 - 5 Other _____

8. Overall, what do you believe your clients think is the primary disadvantage of e-technology? (CHECK ONLY ONE)
- 1 Security
 - 2 Incompatibility
 - 3 Inconsistent use among businesses
 - 4 Loss of personal contact
 - 5 Information overload
 - 6 Other _____
9. Overall, which best describes your company/organization's clients with regard to new technology? (CHECK ONE)
- 1 Early Adopter – among the first to try a new technology
 - 2 Wait a little while for the technology to be proven
 - 3 Late to enter – wait for the technology to mature/costs to go down before adopting
10. How satisfied are you, personally, with your own current e-technology skills?
- 1 Very dissatisfied
 - 2 Somewhat dissatisfied
 - 3 Neither satisfied nor dissatisfied
 - 4 Somewhat satisfied
 - 5 Very satisfied
11. How satisfied do you think your clients are with e-technology skills your company demonstrates? (CHECK ONE)
- 1 Very dissatisfied
 - 2 Somewhat dissatisfied
 - 3 Neither satisfied nor dissatisfied
 - 4 Somewhat satisfied
 - 5 Very satisfied
12. Thinking about your clients point of view, what areas of improvement does your company need?
13. How do you use the web when you access it for business purposes? (CHECK ALL THAT APPLY)
- 1 Research competitors
 - 2 Research industry trends
 - 3 Search for suppliers, vendors, or consultants
 - 4 Access newsletters/articles pertaining to my industry
 - 5 Join or participate in forums in my industry
 - 6 Locate customers or potential clients
 - 7 Communicate via message boards, forums, etc.
 - 8 Other _____

14. On average, how many hours a week do you use the web for business? (CHECK ONE)

- 1 Less than 1 hour a week
- 2 1 to under 4 hours a week
- 3 4 to under 6 hours a week
- 4 6 to under 10 hours a week
- 5 10 to under 20 hours a week
- 6 20 to under 40 hours a week
- 7 40 hours a week or more

15. How do you find out about new business-related web pages/sites? (CHECK ALL THAT APPLY)

- 1 Recommended by business associates/friends
- 2 Follow hyperlinks from other web pages
- 3 Internet search engines (i.e., Alta Vista, Lycos)
- 4 Internet directories (i.e., Yahoo, McKinley)
- 5 Usenet news groups
- 6 Magazines/newspapers
- 7 Books
- 8 Signatures at end of e-mail messages
- 9 Television advertisements
- 10 Other _____

16. (IF CHECKED 3 or 4 TO Q. 15, ASK) Which of the following navigation/search services have you used within the past six months? (CHECK ALL THAT APPLY)

- 1 Alta Vista
- 2 Excite
- 3 HotBot
- 4 Lycos
- 5 Yahoo
- 6 InfoSeek
- 7 AOL NetFind
- 8 Bigfoot
- 9 411
- 10 MetaCrawler
- 11 Web Crawler
- 12 WhoWhere?
- 13 GTE SuperPages
- 14 MSN
- 15 Google
- 16 Other _____

17. In general how concerned do you think your clients are about security on the Internet? Keep in mind that security can mean privacy, confidentiality, and/or proof of identity for you or someone else. (CHECK ONE)
- 1 Not at all concerned
 - 2 Somewhat concerned
 - 3 Very concerned
18. What security systems do you use? (CHECK ALL THAT APPLY)
- 1 Password protection for files
 - 2 Password protection for your site
 - 3 Limited access fire wall
 - 4 No access fire wall
 - 5 Encrypted files
 - 6 Other _____
19. Please rate your agreement with the following statements concerning your company's use of the web. Use the following scale from 1 to 5: 1 = strongly disagree; 2 = somewhat disagree; 3 = neither agree nor disagree; 4 = somewhat agree; and 5 = strongly agree.
- The organization I work for uses the web effectively
- ____ To market to/look for customers
- ____ To streamline internal operations
- ____ To communicate with customers/clients
- ____ In training and development
20. What information do you believe should be included in the web site of an Architectural, Engineering, or Construction firm? (CHECK ALL THAT APPLY)
- 1 Basic brochure information (general capabilities)
 - 2 Pricing information
 - 3 Company geographic location
 - 4 Company telephone number
 - 5 E-mail contact information
 - 6 Detailed information about the company/organization
 - 7 Question and Answer forum
 - 8 Frequently asked questions
 - 9 Current project information
 - 10 Client list
 - 11 Bidding and selection information
 - 12 Industry links
 - 13 Other _____

21. What do you see as the greatest SINGLE technology challenge facing your business today? (CHECK ONE)
- 1 Adoption of technology
 - 2 Keeping up with technology
 - 3 Finding and retaining qualified technology employees
 - 4 Cost of new technology
 - 5 Effective marketing strategies using e-technology
 - 6 Training and development of employees
 - 7 Procuring supplies/goods through e-commerce
 - 8 Other _____
22. Which of the following strategies will your company use to grow in the next year? (CHECK ALL THAT APPLY)
- 1 Internet/Web
 - 2 Strategic business alliance
 - 3 Investment expansion (office space, employees, etc.)
 - 4 Outsourcing
 - 5 Joint venture
 - 6 Investments in R&D
 - 7 Merger
 - 8 Re-structuring
 - 9 Other _____
 - 10 None of the above
23. Which of the following best describes your company or organization in terms of its technology staff? (CHECK ONE)
- 1 Have a full-time specialist in house
 - 2 Have a fully staffed IT or MIS department
 - 3 Have some computer staff in house but outsource
 - 4 Outsource for all IT/computer related services
24. What types of specialized Architectural/Engineering/Construction software programs are your company currently using? (CHECK ALL THAT APPLY)
- 1 Computer Aided Drafting, Computer Aided Design
 - 2 3 -D Model/Animation
 - 3 Project management
 - 4 Web-hosted project collaboration software
 - 5 Project scheduling software
 - 6 Other _____
 - 7 None

25. Who generally influences the purchase of hardware and software used within your company? (CHECK ALL THAT APPLY)

- 1 In house computer technology staff
- 2 Outside consultant
- 3 Management
- 4 Clients
- 5 Industry trends
- 6 Other _____

26. In which of the following areas does your company plan to increase technology over the next twelve months? (CHECK ALL THAT APPLY)

- 1 Internal technology staff
- 2 Outsource/contract technology staff
- 3 Training
- 4 Equipment/hardware
- 5 Software
- 6 Web design
- 7 Other _____
- 8 None of the above

27. Approximately what percent of net revenue will your company devote to computer technology over the next twelve months? (CHECK ONE)

- 1 0%
- 2 1% to under 4%
- 3 4% to under 6%
- 4 6% to under 8%
- 5 8% or more
- 6 Don't know

The following questions are for classification purposes only.

28. Which of the following best describes your company? (CHECK ONE)

- 1 Architectural
- 2 Engineering
- 3 Construction
- 4 Other _____

29. Within the past year, has your company bought, merged with, been acquired by, or spun off from another company? (CHECK ONE)

- 1 Yes
- 2 No

30. How many people are employed with your company or organization on a full-time basis? (CHECK ONE)
- 1 Less than 25
 - 2 25 to under 50
 - 3 50 to under 100
 - 4 100 to under 250
 - 5 250 to under 500
 - 6 500 or more
31. How many years has your company or organization been in operation? (CHECK ONE)
- 1 Less than 5 years
 - 2 5 to less than 10 years
 - 3 10 to less than 20 years
 - 4 20 to less than 30 years
 - 5 30 years or more
32. Where is your company located? –city, state, country
33. Approximately what is your company's total annual revenue? (CHECK ONE)
- 1 Less than \$5 million
 - 2 \$5 million to under \$10 million
 - 3 \$10 million to under \$50 million
 - 4 \$50 million to under \$100 million
 - 5 \$100 million to under \$500 million
 - 6 \$500 million or more
 - 7 Not-for-profit organization

THANK YOU FOR YOUR PARTICIPATION IN THIS RESEARCH PROJECT. IF YOU WOULD LIKE TO RECEIVE A COMPLIMENTARY COPY OF THE RESEARCH FINDINGS, PLEASE PROVIDE YOUR E-MAIL ADDRESS.

E-mail address _____

Client Survey

Please read each question with accompanying instructions carefully and provide your honest input.

1. Which of the following capabilities does your company/organization currently have available? (CHECK ALL THAT APPLY)

- 1 Internet – access to the world wide web
- 2 Intranet – staff access to corporate data
- 3 Extranet – external with customers, vendors, or suppliers
- 4 E-mail
- 5 Web site
- 6 Web cam
- 7 Flash animation
- 8 Streaming audio and/or video
- 9 Animation/virtual tours
- 10 Virtual office (remote staff/telecommuting)
- 11 Listserve/message boards
- 12 Computer network – internal office
- 13 T1/Frame Relay Network – multiple offices
- 14 VPN (Virtual Private Network)
- 15 ISDN
- 16 DSL/Cable Modem
- 17 Satellite/Cable TV
- 18 Video conferencing
- 19 Telephone conferencing (speaker phone)
- 20 Computer/video projector
- 21 Smart boards (electronic marker board)
- 22 Pager (alpha/numeric)
- 23 Digital pager (e.g., Blackberry)
- 24 Personal Digital Assistant (PDA)
- 25 Cell phones
- 26 Scanner
- 27 Facsimile
- 28 Graphic capabilities (i.e., Adobe PhotoShop, etc.)
- 29 Project management software
- 30 Project collaboration web sites
- 31 Database management software
- 32 Customer relationship management software
- 33 Other _____

2. How often do you experience compatibility problems when communicating with Architectural/Engineering/Construction firms? (CHECK ONE)

- 1 Never (SKIP TO Q. 4)
- 2 Less than 10% of the time
- 3 10% to less than 50% of the time
- 4 50% of the time or more

3. Please explain, in detail, the compatibility problems you experience.

4. What do you believe is the primary advantage of e-technology? (CHECK ONLY ONE)
- 1 Cost savings
 - 2 Time savings
 - 3 Centralization of data/information
 - 4 Availability of information
 - 5 Other _____
5. What do you believe is the primary disadvantage of e-technology? (CHECK ONLY ONE)
- 1 Security
 - 2 Incompatibility
 - 3 Inconsistent use among businesses
 - 4 Loss of personal contact
 - 5 Information over-load
 - 6 Other _____
6. Which best describes your company's plans for an online procurement system? (CHECK ONE)
- 1 do you currently have an online procurement system for goods and/or services
 - 2 do not currently have an online procurement system for goods/services but plan to have one within the next twelve months
 - 3 do not currently have an online procurement system for goods/services but plan to have one (timeframe unknown)
 - 4 do not currently have an online procurement system for goods/services and have no plans to establish one anytime in the foreseeable future (SKIP TO Q. 8)
7. If you have or plan to have an online procurement system, which of the following uses apply or will apply? (CHECK ONE)
- 1 Design services
 - 2 Construction services
 - 3 Both design and construction services
 - 4 Neither design nor construction
 - 5 Don't know
8. Which best describes your organization with regard to new technology? (CHECK ONE)
- 1 Early Adopter – among the first to try a new technology
 - 2 Wait a little while for the technology to be proven
 - 3 Late to enter – wait for the technology to mature/costs to go down before adopting
9. How satisfied are you, personally, with your own current e-technology skills?
- 1 Very dissatisfied
 - 2 Somewhat dissatisfied
 - 3 Neither satisfied nor dissatisfied
 - 4 Somewhat satisfied
 - 5 Very satisfied

10. Overall, how satisfied are you with the current e-technology skills of Architectural/Engineering/Construction firms that you do business with? (CHECK ONE)
- 1 Very dissatisfied
 - 2 Somewhat dissatisfied
 - 3 Neither satisfied nor dissatisfied
 - 4 Somewhat satisfied
 - 5 Very satisfied
11. If rating of 1 to 4, please explain what areas you would like A/E/C firms to improve upon.
12. How do you use the web when you access it for business purposes? (CHECK ALL THAT APPLY)
- 1 Research competitors
 - 2 Research industry trends
 - 3 Search for suppliers, vendors, or consultants
 - 4 Access newsletters/articles pertaining to my industry
 - 5 Join or participate in forums in my industry
 - 6 Locate customers or potential clients
 - 7 Communicate with message boards, forums, etc.
 - 8 Other _____
13. On average, how many hours a week do you use the web for business? (CHECK ONE)
- 1 1 hour a week or less
 - 2 2 to under 4 hours a week
 - 3 4 to under 6 hours a week
 - 4 6 to under 10 hours a week
 - 5 10 to under 20 hours a week
 - 6 20 to under 40 hours a week
 - 7 40 hours a week or more
14. What information do you believe should be included in the web site for an Architectural, Engineering, or Construction firm? (CHECK ALL THAT APPLY)
- 1 Basic brochure information (general capabilities)
 - 2 Pricing information
 - 3 Company geographic location
 - 4 Company telephone number
 - 5 E-mail contact information
 - 6 Detailed information about the company/organization
 - 7 Question and Answer forum
 - 8 Frequently asked questions
 - 9 Current project information
 - 10 Client list
 - 11 Bidding and selection information
 - 12 Industry links
 - 13 Other _____

15. What capabilities do you expect an A/E/C company web site to have?
- 1 Basic brochure information (general capabilities)
 - 2 Post a project and update it
 - 3 Direct access to drawings and specifications
 - 4 Animation
 - 5 Rendering
 - 6 Graphic capabilities
 - 7 Electronic submittal of RFP or RFQ
 - 8 Web cam technology
 - 9 Billing and payment
 - 10 Other _____
16. How do you find out about new business-related web pages/sites? (CHECK ALL THAT APPLY)
- 1 Recommended by business associates/friends
 - 2 Follow hyperlinks from other web pages
 - 3 Internet search engines (i.e., Alta Vista, Lycos)
 - 4 Internet directories (i.e., Yahoo, McKinley)
 - 5 Usenet news groups
 - 6 Magazines/newspapers
 - 7 Books
 - 8 Signatures at end of e-mail messages
 - 9 Television advertisements
 - 10 Other _____
17. (IF CHECKED 3 or 4 TO Q. 16) Which of the following navigation/search services have you used within the past six months? (CHECK ALL THAT APPLY)
- 1 Alta Vista
 - 2 Excite
 - 3 HotBot
 - 4 Lycos
 - 5 Yahoo
 - 6 InfoSeek
 - 7 AOL NetFind
 - 8 Bigfoot
 - 9 411
 - 10 MetaCrawler
 - 11 Web Crawler
 - 12 WhoWhere?
 - 13 GTE SuperPages
 - 14 MSN
 - 15 Google
 - 16 Other _____

18. How often do you research Architectural/Engineering/Construction firms using the web?
(CHECK ONE)
- 5 Frequently
 - 4 Often
 - 3 Sometimes
 - 2 Rarely
 - 1 Never (SKIP TO Q.21)
19. Thinking of Architectural/Engineering/Construction firm web sites you have visited, rate your level of agreement with the following statements regarding the impact or impression these web sites have on you. Please rate the following statements on a scale from 1 to 5 where 1 = strongly disagree and 5 = strongly agree.
- ___ Visual appeal is important in decision to look further at a company or organization
 - ___ Web site content is more important than visual appeal
 - ___ A web site is an accurate reflection of the professionalism and image of an organization
 - ___ I have selected an A/E/C company based on its e-technology
20. What aspects of Architectural/Engineering/Construction firm web sites do you particularly dislike? Please be specific.
21. Rank order the following in terms of importance in selecting an Architectural/Engineering/Construction firm. Place a "1" next to the factor you feel is most important, a "2" next to the factor you feel is second important, a "3" next to the factor you feel is third important, and continue until all five factors have been ranked.
- ___ Expertise in a specialized area
 - ___ Broad range of capabilities
 - ___ E-technology
 - ___ Price
 - ___ Web site
 - ___ Responsive service
 - ___ Nearby location
 - ___ Design talent
 - ___ Innovation
 - ___ Staffing capacity
 - ___ Previous positive relationship with the firm

- 22a. How much importance do you give e-technological expertise in making your selection of Architectural/Engineering/Construction firms?
- 1 0-10% importance
 - 2 11-25% importance
 - 3 26-50% importance
 - 4 51-75% importance
 - 5 Over 75% importance
- 22b. Please rate to what extent a firm's e-technological expertise is changing in importance in your selection process. Do you feel e-technological expertise is becoming...
- 1 More important
 - 2 Somewhat important
 - 3 Somewhat unimportant
 - 4 Not at all important
 - 5 Don't know/not sure
22. Please rate how important each of the following factors is when you access web sites of Architectural/Engineering/Construction firms. Assign a rank for each factor on a scale from 1 to 5 where 1 = not at all important and 5 = very important. If there is an important factor that is not listed, please list it next to 'other' and rate.
- _____ Availability of contact information
 - _____ Interactive web site
 - _____ Question and Answer forum
 - _____ Automatic billing and payment
 - _____ RFP/RFQ submittal
 - _____ Access to projects
 - _____ Bidding and selection
 - _____ Virtual tour
 - _____ Industry links
 - _____ Client list
 - _____ Rendering and animation capabilities
 - _____ Pricing information
 - _____ Information about products
 - _____ Current project information
 - _____ Information about the company
 - _____ Employee profiles
 - _____ Project photographs
 - _____ Other _____
23. In general how concerned are you about security on the Internet? Keep in mind that security can mean privacy, confidentiality, and/or proof of identity for you or someone else. (CHECK ONE)
- 1 Not at all concerned
 - 2 A little concerned
 - 3 Somewhat concerned
 - 4 Very concerned

24. What do you see as the SINGLE greatest technology challenge facing your business today? (CHECK ONE)

- 1 Adoption of technology
- 2 Keeping up with technology
- 3 Finding and retaining qualified technology employees
- 4 Cost of new technology
- 5 Effective marketing strategies using e-technology
- 6 Training and development of employees
- 7 Procuring supplies/goods through e-commerce
- 8 Other _____

25. Which of the following strategies will your company use to grow in the next year? (CHECK ALL THAT APPLY)
- 1 Internet/web
 - 2 Strategic business alliance
 - 3 Investment expansion (office space, employees, etc.)
 - 4 Outsourcing
 - 5 Joint venture
 - 6 Investments in R&D
 - 7 Merger
 - 8 Re-structuring
 - 9 Other _____
 - 10 None of the above
26. Which of the following best describes your company or organization in terms of its technology staff? (CHECK ONE)
- 1 Have a full-time specialist in house
 - 2 Have a fully staffed IT or MIS department
 - 3 Have some computer staff in house but outsource
 - 4 Outsource for all IT/computer related services
27. Who generally influences the purchase of hardware and software used within your company? (CHECK ALL THAT APPLY)
- 1 In house computer technology staff
 - 2 Outside consultant
 - 3 Management
 - 4 Clients
 - 5 Industry trends
 - 6 Other _____
28. In which of the following areas does your company plan to increase technology over the next twelve months? (CHECK ALL THAT APPLY)
- 1 Internal technology staff
 - 2 Outsource/contract technology staff
 - 3 Training
 - 4 Equipment/hardware
 - 5 Software
 - 6 Web design
 - 7 Other _____
 - 8 None of the above

29. Approximately what percent of net revenue will your company devote to computer technology over the next twelve months? (CHECK ONE)

- 1 0%
- 2 1% to under 4%
- 3 4% to under 6%
- 4 6% to under 8%
- 5 8% or more
- 6 Don't know

The following questions are for classification purposes only.

30. Which of the following best classifies your company? (CHECK ONE)

- 1 Industrial (Manufacturing; Utility; Infrastructure; etc.)
- 2 Institutional (Academic; Health; Religious; etc.)
- 3 Commercial (Recreation; Entertainment; Office; etc.)
- 4 Government/Public (Military; Transportation; etc.)
- 5 Residential (Single family; Multi-family; etc.)
- 6 Other _____

31. Within the past year, has your company/organization bought, merged with, been acquired by, or spun off from another company?

- 1 Yes
- 2 No
- 3 Not applicable

32. How many people are employed with your company or organization on a full-time basis? (CHECK ONE)

- 1 Less than 25
- 2 25 to under 50
- 3 50 to under 100
- 4 100 to under 250
- 5 250 to under 500
- 6 500 or more

33. How many years has your company or organization been in operation? (CHECK ONE)

- 1 Less than 5 years
- 2 5 to less than 10 years
- 3 10 to less than 20 years
- 4 20 to less than 30 years
- 5 30 years or more

34. Where is your company/organization located? – city, state, country

35. Approximately what is your company's/organization's total annual revenue?
- 1 Less than \$5 million
 - 2 \$5 million to under \$10 million
 - 3 \$10 million to under \$50 million
 - 4 \$50 million to under \$100 million
 - 5 \$100 million to under \$500 million
 - 6 \$500 million or more
 - 7 Not-for-profit organization
36. Over the past three years combined (98, 99, 00), approximately how many dollars has your company directed towards construction projects?
- 1 Up to \$10M
 - 2 \$10 to under \$100 million
 - 3 \$100 to under \$500 million
 - 4 \$500 million or more
37. Over the next three years combined, how many dollars do you expect your company to direct towards construction projects?
- 1 Up to \$10M
 - 2 \$10 to under \$100 million
 - 3 \$100 to under \$500 million
 - 4 \$500 million or more

THANK YOU FOR YOUR PARTICIPATION IN THIS RESEARCH PROJECT. IF YOU WOULD LIKE TO RECEIVE A COMPLIMENTARY COPY OF THE RESEARCH FINDINGS, PLEASE PROVIDE YOUR E-MAIL ADDRESS.

E-mail address _____

CONTACT INFORMATION

Judy Kienle
Principal
Kienle Communications, Ltd.
6089 Frantz Road, Suite 102
Dublin, OH 43017

Telephone: (614) 798-0055
Fax: (614) 798-2255
E-mail: jkienle@mindspring.com

Barbara L. Allan
President
Sunbelt Research Associates, Inc.
1001 North U.S. Highway One, Suite 310
Jupiter, FL 33477-4437

Telephone: (561) 744-5662
Fax: (561) 575-7396
E-mail: blallan@sunbeltresearch.com