

EVERGREEN FIELD GUIDE / SEVEN PILLARS / FIVE FIRM SIZES

The Modern AEC Firm Playbook

A practical operating map for making the firm behind the work stronger.

DESIGNED FIELD EDITION + SEVEN-PILLAR DISCUSSION KIT



CLEARWORKS.AI / AEC OPERATING SYSTEMS, WORKFLOW DESIGN & RESPONSIBLE AI



Start with the firm you have.

Choose the size closest to your firm. Look for the problem you recognize. Read one size backward for the foundation you may have skipped and one size forward for what is likely to break next.

7 CONNECTED OPERATING PILLARS	5 FIRM-SIZE ARCHETYPES	1 VISIBLE LEARNING LOOP
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A modern firm makes it easier for people to find what they need, hand work off, make decisions, understand the money, use technology well, and win the right work—without everything depending on one person.

MODEL BOUNDARY

The five archetypes are Clearworks operating models, not AIA reporting categories. Firm size changes the path, not the need to make ownership, information, judgment, and learning visible.

The seven connected pillars

01 Leadership & Culture

Make priorities visible and give people room to improve the work.

02 Workflow & Operations

Turn recurring delivery into a visible, teachable system.

03 Technology & AI

Give each system a job and connect AI to governed firm knowledge.

04 Knowledge Transfer

Move the firm's judgment from individual memory into daily work.

05 Business Model & Finance

Know which work creates value and how the firm converts effort into margin.

06 Positioning & Brand

Make the firm's point of view legible before the interview begins.

07 Business Development

Turn relationships, evidence, and follow-through into a repeatable path to good work.

Leadership & Culture

Make priorities visible and give people room to improve the work.

FIRM SIZE	WHAT THE CAPABILITY LOOKS LIKE
SOLO 1	Protect the principal's attention; write down the decisions only the principal can make.
SMALL 5	Set a weekly priority rhythm and make ownership explicit instead of carrying it in the founder's head.
GROWING 15	Create real team leads, decision rights, and a repeatable way to surface friction from the work.
ESTABLISHED 50	Run a leadership operating cadence across studios, delivery, finance, people, and growth.
LARGE 150	Set enterprise guardrails while giving offices and disciplines room to adapt within them.

Workflow & Operations

Turn recurring delivery into a visible, teachable system.

FIRM SIZE	WHAT THE CAPABILITY LOOKS LIKE
SOLO 1	Use one trusted project and task record; standardize the few recurring checklists that protect quality.
SMALL 5	Map pursuit-to-closeout handoffs and stop rebuilding the same tracker for every project.
GROWING 15	Define stage gates, owners, exception paths, and current-state dashboards before adding more tools.
ESTABLISHED 50	Connect project, staffing, financial, and quality workflows so leaders can see drift before a crisis.
LARGE 150	Manage an operating architecture across offices, disciplines, acquisitions, and shared services.

Technology & AI

Give each system a job and connect AI to governed firm knowledge.

FIRM SIZE	WHAT THE CAPABILITY LOOKS LIKE
SOLO 1	Choose a secure core stack and automate one frequent, high-friction workflow at a time.
SMALL 5	Standardize accounts, files, templates, permissions, and approved AI use before habits fragment.
GROWING 15	Assign system owners; connect project data; build reusable workflows with human review and writeback.
ESTABLISHED 50	Create a technology roadmap, integration layer, adoption program, and measured portfolio of automations.
LARGE 150	Govern platforms, data, models, agents, security, and interoperability as enterprise capabilities.

Knowledge Transfer

Move the firm's judgment from individual memory into daily work.

FIRM SIZE	WHAT THE CAPABILITY LOOKS LIKE
SOLO 1	Capture decisions, templates, details, and lessons as work happens so the practice can reuse them.
SMALL 5	Create a shared project library and document the why behind standards, not only the steps.
GROWING 15	Build onboarding, mentorship, searchable precedent, and closeout capture into project delivery.
ESTABLISHED 50	Give knowledge domains owners, maintenance cycles, source links, and measures of reuse.
LARGE 150	Connect expertise across offices and disciplines through governed search, communities, and succession paths.

Business Model & Finance

Know which work creates value and how the firm converts effort into margin.

FIRM SIZE	WHAT THE CAPABILITY LOOKS LIKE
SOLO 1	Know cash, backlog, effective rate, project cost, and the minimum fee needed for healthy work.
SMALL 5	Build a monthly financial rhythm, consistent project setup, and fast invoicing and collections.
GROWING 15	Connect staffing, scope, schedule, fees, pipeline, and project health in one management view.
ESTABLISHED 50	Manage portfolio mix, capacity, risk, pricing, and investment with reliable forward-looking data.
LARGE 150	Model enterprise performance by market, office, client, service, and acquisition—not only in aggregate.

Positioning & Brand

Make the firm's point of view legible before the interview begins.

FIRM SIZE	WHAT THE CAPABILITY LOOKS LIKE
SOLO 1	Name the work, client, and belief the practice wants to be known for; show proof from real projects.
SMALL 5	Turn project experience into a consistent story, visual system, and useful body of expertise.
GROWING 15	Choose priority markets and align website, proposals, talks, awards, and recruiting around them.
ESTABLISHED 50	Manage reputation across practice areas while preserving a coherent firm-level point of view.
LARGE 150	Operate a portfolio of brands, sectors, geographies, and public expertise with shared standards and local relevance.

Business Development

Turn relationships, evidence, and follow-through into a repeatable path to good work.

FIRM SIZE	WHAT THE CAPABILITY LOOKS LIKE
SOLO 1	Maintain a small relationship list, a follow-up rhythm, and a reusable record of project proof.
SMALL 5	Create one lead desk for inquiries, referrals, pursuits, next actions, and proposal ingredients.
GROWING 15	Define qualification, pursuit ownership, capture planning, proposal assembly, and win-loss learning.
ESTABLISHED 50	Connect market intelligence, seller-doers, account plans, pipeline, workload, and project outcomes.
LARGE 150	Coordinate enterprise accounts, sectors, regions, partnerships, and cross-selling through shared intelligence.

Five stages from visibility to leverage

Modernization is not a one-time technology project. It is a recurring operating discipline.

1 See the firm as it works

Trace real work from trigger to outcome. Record where information begins, who decides, what gets re-entered, where state disappears, and which exceptions consume leadership attention.

2 Make the recurring path explicit

Define the owner, source, handoff, review gate, accepted destination, and measure for the workflow. A usable standard describes the normal path and what happens when reality departs from it.

3 Connect the record

Reduce parallel versions of truth. Link project, relationship, financial, staffing, document, and decision records so the team can retrieve context and see current state without reconstruction.

4 Build leverage into the work

Use templates, automation, AI skills, dashboards, and role design to remove repeated assembly and checking. Qualified people retain the decisions that require judgment and accountability.

5 Run the learning loop

Measure adoption, exceptions, rework, cycle time, quality, margin, and client response. Feed corrections and project lessons back into standards, training, offers, and the next workflow.

PROFESSIONAL BOUNDARY

Templates, automation, AI skills, dashboards, and role design can remove repeated assembly and checking. Qualified people retain the decisions that require judgment and accountability.

Seven questions worth asking together

These are discussion signals, not a maturity score. Differences between leadership and frontline answers are useful evidence.

- 01 **Leadership signal:** Can people name the firm's current priorities, who owns them, and where decisions get made?
- 02 **Workflow signal:** Can a team see the current state of a pursuit or project without building a fresh spreadsheet?
- 03 **Technology signal:** Does each core system have an owner, an authoritative record, and a defined relationship to AI?
- 04 **Knowledge signal:** Can someone find the approved detail, decision, precedent, or lesson with its source and context?
- 05 **Financial signal:** Can leaders see backlog, capacity, project health, cash, and pipeline early enough to act?
- 06 **Positioning signal:** Does public proof make the firm's expertise and point of view obvious to the right buyer?
- 07 **Growth signal:** Does every meaningful relationship and pursuit have an owner, next action, and learning record?

KEEP GOING

The Workflow Atlas shows concrete possibilities across winning work, production, delivery, construction, operations, finance, knowledge, and adoption. The State of AI in AEC report supplies the dated industry evidence behind the operating model.

What this playbook is—and is not

- 01** AIA, 2024 Firm Survey Report: more than 1,200 firms. The five playbook archetypes are Clearworks operating models, not AIA reporting categories.
- 02** AIA, The Architect's Journey to Specification (2025): AI-adoption findings use a different instrument and population from the Firm Survey.
- 03** McKinsey, The State of Organizations 2026: leadership, collaboration, organizational health, and technology adoption research across industries; not AEC-specific.
- 04** buildingSMART, Industry Foundation Classes: evidence for open, machine-interpretable data standards across the built-asset lifecycle.
- 05** Clearworks, State of AI in AEC — Q3 2026: public industry sources, anonymized field research, adoption patterns, and methodology supporting this playbook.

Canonical web edition: <https://clearworks.ai/resources/modern-aec-firm-playbook>

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