

2025 Pacific Regional Conference Recap Panel

smps
Sacramento

February 25, 2025



Welcome!



Andy Larson
Cunningham Engineering

SMPS Sacramento President-Elect
andy@cecwest.com



2025 PRC Recap Panel



Thank You To Our Annual Sponsors



Capitol Level



City Level



Village Level



Honor Marti's Legacy – Apply for the Marti Martin Pacific Regional Conference Scholarship

Requirements

- Scholarships are for conference registration (\$675); travel and hotel not included.
- Must be a current SMPS Sacramento Chapter member. All members will be considered.
- Scholarship recipients will be required to participate in the PRC Recap on conference takeaways in March.



Pacific Regional Conference Recap Panelists



Christine Kenney, CPSM
Ascent



Haley Palmer
Wood Rodgers, Inc.



Kelli Patton
Swinerton



Sierra Scott
RMW architecture +
interiors



Andy Larson, CPSM
Cunningham Engineering

Conference Presenter



Damion Morris, CPSM
District Marketing &
Communications Manager
PCL Construction

From Why to Wow: Shaping Your Future with Courageous Curiosity

This session reinforced the power of curiosity and critical thinking. It highlighted common barriers to asking better questions and provided strategies to foster a more inquisitive and solution-oriented mindset.

Recap By:



Christine Kenney, CPSM
Ascent

Courageous Curiosity

Why do you do what you do?

The right question is usually more important than the right answer. – Plato

The important thing is not to stop questioning. For curiosity has its own reason for existing. – Albert Einstein

Courageous Curiosity

Common Barriers to Questions

- Fear of Judgement
- Lack of Confidence
- Group Dynamics



Courageous Curiosity

Asking Beautiful Questions



Why?

To Discover Underlying Reasons



What if?

To Consider Alternative Possibilities



How?

To Turn Ideas Into Tangible Results

Courageous Curiosity

Example Questions

- How does that make you feel?
- What do we hope to accomplish with this meeting?
- What is our strategy to win?
- What is this supposed to teach me?
- Who do I want to be?

Life is either a daring adventure or nothing at all. – Helen Keller

Conference Presenter



Donna Corlew, FSMPS, CPSM
Founder, Chief WIT* Officer

Finding a Capture Plan Oasis in the RFP Desert!

This session focused on how to develop effective capture plans to secure more business. It provided practical strategies for identifying high-value opportunities, improving our proposal development process, and enhancing our competitive advantage. By applying these methods, we can increase our win rates and optimize our approach to business development.

Recap By:

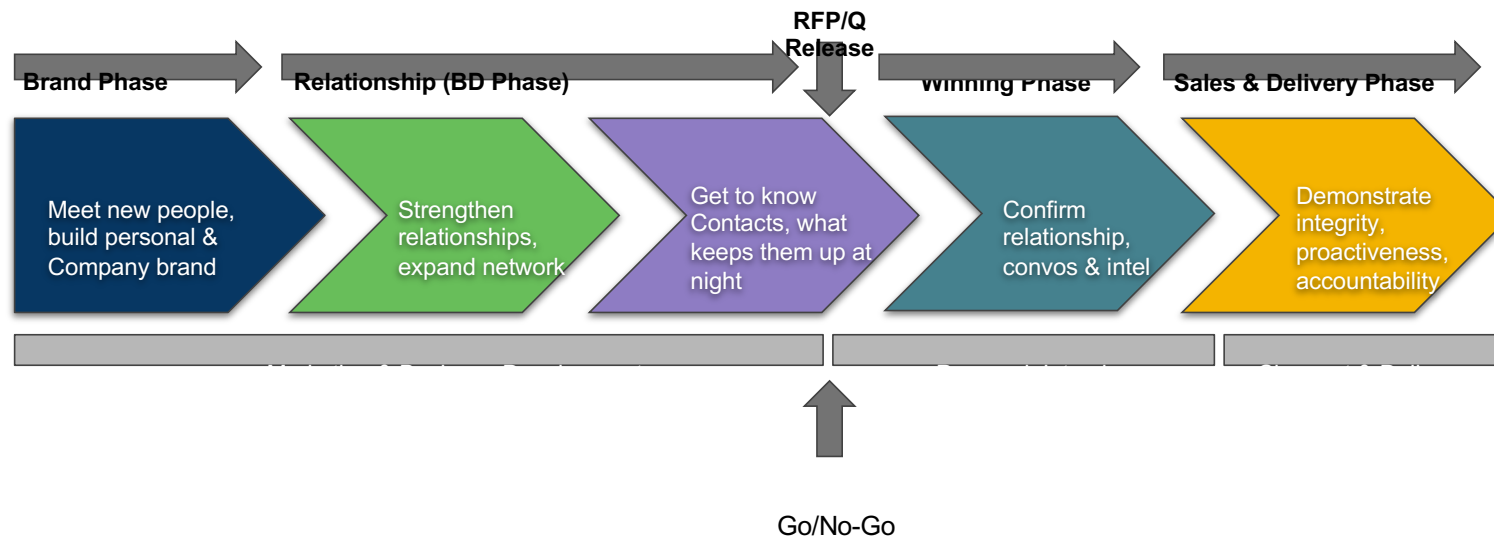


Haley Palmer
Wood Rodgers, Inc.

Finding A Capture Plan Oasis

Understanding the Capture Process

- Brand Phase > Relationship (BD Phase) > RFP/Q Release > Win Phase > Sales & Delivery Phase = Repeat



Finding A Capture Plan Oasis

Key Components of a Solid Capture Plan

- Funding
- Key Contact
- History
- Competitors
- Win Strategy (Challenge, Concepts, Gain, Evidence)



Finding A Capture Plan Oasis

Addressing Challenges & Adding Value

- **Challenge** - Concerns? Impact on Delivery
- **Concepts** - Relieve each point
- **Gains** - Client gain? Benefit?
- **Evidence** - Where have we done it before? Speak to it.



Finding A Capture Plan Oasis

“Create Strategy from Chaos”

- **Focus on 3 BIG things**
 - WHAT sets you apart from the rest (think differentiators)
- **Building your team**
 - WHO is qualified, obtains the relationship, availability, etc.
- **Telling your story**
 - WHY we are relevant to the Client



Dumpster Fire

Finding A Capture Plan Oasis

“Create Strategy from Chaos”

- **Focus on 3 BIG things**
 - WHAT sets you apart from the rest (think differentiators)
- **Building your team**
 - WHO is qualified, obtains the relationship, availability, etc.
- **Telling your story**
 - WHY we are relevant to the Client



Office/Proposal Oasis

Finding A Capture Plan Oasis

Tailored Response/Crafting a Compelling Message

- Focus on the Message
 - Strong Cover Letter
 - First Paragraph should highlight Client & Project
 - Opening statement reflects understanding of Relationship
 - Emphasize the 3 BIG things
 - Summarize Key selling points



Avoid over-engineering the scope - focus on needs



Focus on the “boots ground” - different perspectives

Finding A Capture Plan Oasis

Remember - YOU are the *Driver*

- *YOU Set the Tone*
 - Help Shape the Perspective
 - Ask Questions - Drive the Conversation
 - Look below the Surface Issues



Conference Presenter



Brandy Little, FSMPS, CPSM
Brand DNA Advisors



Christi Pizarek
inTension Coaching and Consulting
sm^{ps}
Sacramento

Constructing Connections—Brandy & Christi

This session reinforced the power we have over ourselves. It highlighted ways to break free from our default response and choose the way we respond.

Recap By:



Christine Kenney, CPSM
Ascent

2025 PRC Recap Panel

Constructing Connections

Managing Default Modes

- Our Brain ☐ Hardware
- Our Mind ☐ Operating System
- Our Consciousness ☐ Monitor



Constructing Connections

Can you interrupt the default response?



Constructing Connections

Change how you show up (CPR)

- **Catch Yourself**
- **Pause**
- **Reframe**

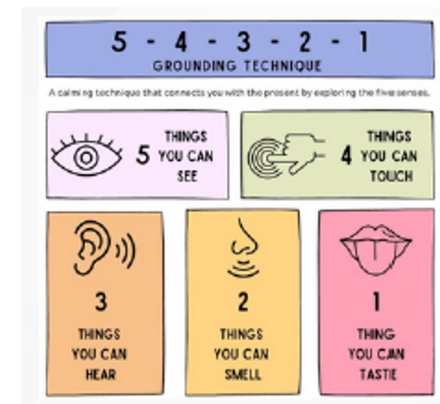
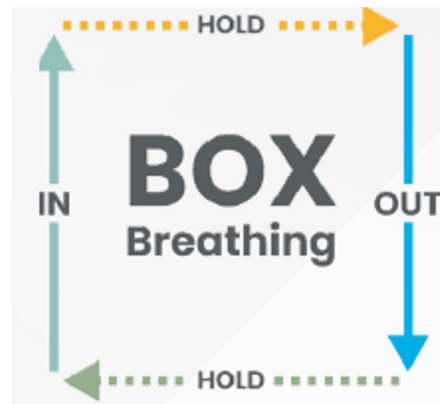
What is your body
telling you?



Constructing Connections

Change how you show up (CPR)

- Catch Yourself
- **Pause**
- Reframe



Constructing Connections

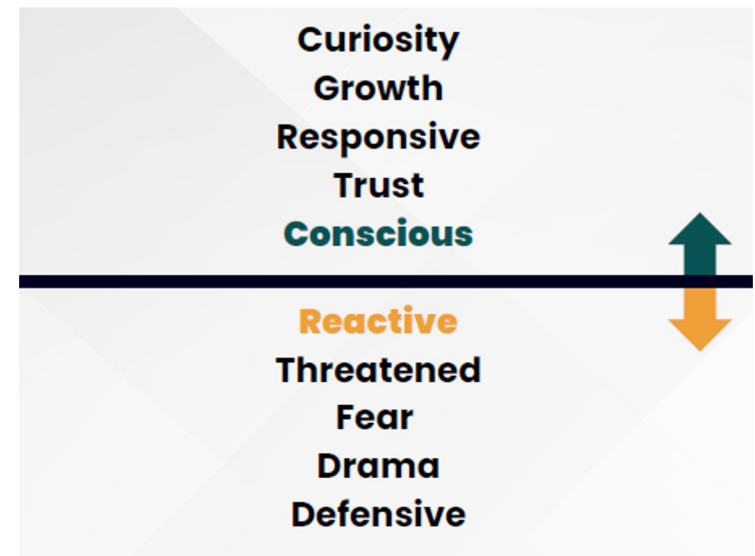
Change how you show up (CPR)

- Catch Yourself
- Pause
- Reframe

What is the **2% truth** in this?

What's the most **generous assumption** I can give in this moment?

Is it more important for me to **Be Right**
or **Get It Right**?



Conference Presenters



Jane Jessen

Director of Marketing & Creative Services
Transpo Group

Ivy Renfroe

Marketing Manager
Transpo Group

'Make it Pop!' - Proposal Design for the Non-Designer

Join us for an engaging and hands-on session designed to empower non-designers with essential skills for creating visually compelling proposals. We will cover core design principles, audience-focused visual strategies, and key InDesign and Illustrator tips. Participate in a breakout session to create your own infographic. Perfect for marketing professionals and proposal managers, this session will help you make your proposals pop!

Recap By:



Kelli Patton
Swinerton

'Make it Pop!' - Proposal Design for the Non Designer

What They Covered

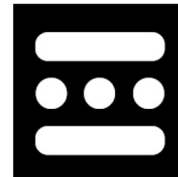
- Principles of Good Design
- Typography Tools
- Setting yourself up for Success
- Infographics Basics



'Make it Pop!' - Proposal Design for the Non Designer

Principles of Good Design

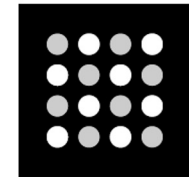
- Balancing/Alignment
- Hierarchy
- Repetition
- Emphasis
- White Space



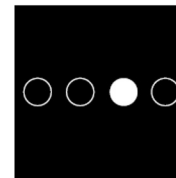
BALANCE/
ALIGNMENT



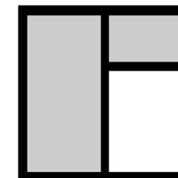
HIERARCHY



REPETITION



EMPHASIS

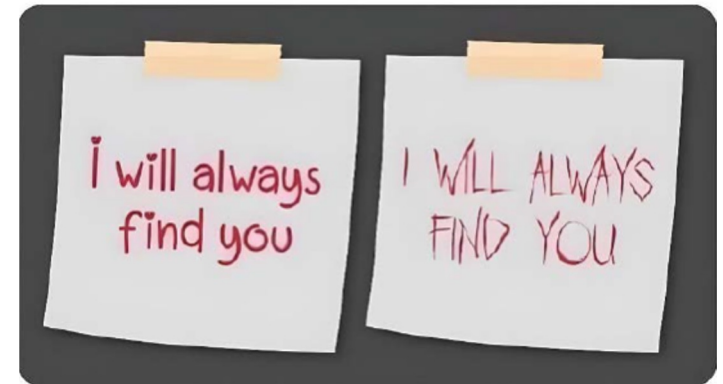


WHITE SPACE

'Make it Pop!' - Proposal Design for the Non Designer

Typography Tools

- Use your fonts wisely
- Use Serif & Sans Serif Combinations
- Understand the differences: Kerning vs Tracking vs Leading
- Mind your widows and orphans (on pages and in paragraphs)
- Stop using two spaces after a period



Fonts convey meaning!

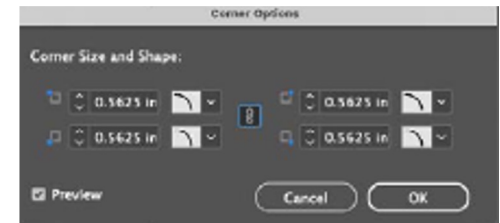
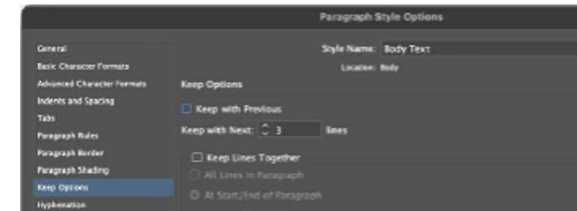
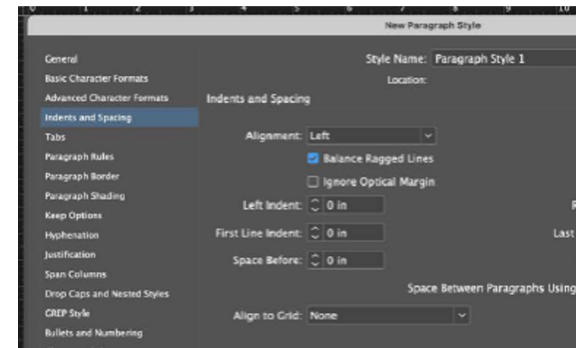


BAD Tracking and Kerning

'Make it Pop!' - Proposal Design for the Non Designer

Set Yourself up for Success

- Use parent pages
- Use paragraph styles
- Other helpful tools
- Mind your widows and orphans (on pages and in paragraphs)
- Stop using two spaces after a period



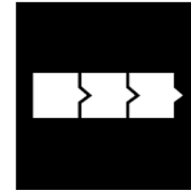
'Make it Pop!' - Proposal Design for the Non Designer

Infographics Basics

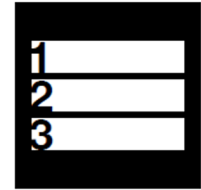
- Timeline
- Process
- List based
- Comparison
- Charts and Graphs
- Geographic Map



TIMELINE



PROCESS



LIST-BASED



COMPARISON

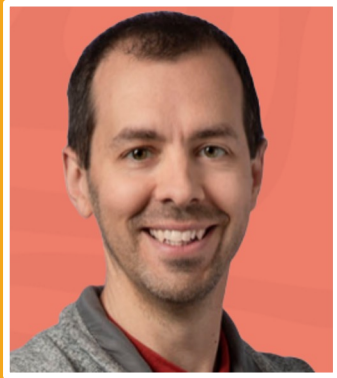


CHARTS & GRAPHS



GEOGRAPHIC/MAP

Conference Presenter



Patrick Cotter
Principal
RESPEC

Inspiring Business Development Success: The Impact of Exceptional Client Engagement

How do you build a firm-wide culture of client engagement? Patrick explains the stages of client development, instructs how to build lasting relationships, identifies success, and establishes a company-wide client engagement culture. It offers ways to establish new relationships and turn those into winning proposals. Covering the transition from proposal to project, Patrick tells us how to stay engaged after completion so staff at all levels can understand their role in engaging with clients.

Recap By:



Sierra Scott
RMW architecture + interiors

The Impact of Exceptional Client Engagement

What is client engagement?

- The interactions between you and your firm that provide value to your clients.
- It applies to all employees and all aspects of the business.
 - For example, does your finance department ensure that invoices are delivered in a timely manner and are easy to read? Are they as committed to your culture of exceptional client service?

The Impact of Exceptional Client Engagement

Why does it matter?

- It will grow relationships and foster trust.
- It's going to improve your win and capture rates.
- It helps ensure successful project outcomes.
- It will lead to more sole-source work.

Companies are
60% more
profitable when
they are client-
centric!

The Impact of Exceptional Client Engagement

How to create a culture of client engagement

- **Position**
 - a. Positioning is not research!
 - b. It's outreach using "right side up thinking"
 - (1:1:1 rule = 1 focus- them, 1 line, 1 easy to answer question)
 - c. It's building and leveraging your reputation through speaking, writing, online presence & networking
- **Pursue**
 - a. Demonstrate reliability, don't focus on differentiation!
 - b. Tell a story, be specific, connect the dots.
 - c. Help clients visualize the future in the present.

The Impact of Exceptional Client Engagement

How to create a culture of client engagement

- **Perform**
 - a. Send a congratulatory email when awarded.
 - b. Kickoff with commitment to be a high performing team, including goals and vision for project.
 - c. Empower staff at all levels to engage meaningfully/make things right.
 - d. Facilitate a smooth project closeout and debrief.
- **Partner**
 - a. Nurture relationships.
 - b. Be knowledgeable and forward thinking.
 - c. Conduct post-project surveys or check-ins.
 - d. Joint awards submissions - involve the client.

Conference Presenter



Frank Lazaro
AI Consultant and Training

Practical AI Use Cases for AEC Marketers

This session explored the practical applications of generative AI tools to assist AEC marketers, project managers, and firm leaders. Attendees were presented with examples of how AI can streamline deliverables, reduce administrative burdens, and enhance writing tasks, making marketers more efficient and productive. The session provided real world examples and case studies to demonstrate the value of AI.

Recap By:



Andy Larson
Cunningham Engineering

Practical AI Use Cases for AEC Marketers



Goal: Use Gen AI to help you find just 12 minutes per day



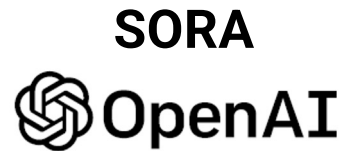
What 12 minutes a day gets your firm;

- **12 minutes of AI efficiencies per day**
- **Equals 1 hour per week**
- **That's 40+ hours or a week's worth of time per year**

Practical AI Use Cases for AEC Marketers



Conversational Search Engine
<http://perplexity.ai>



AI Video Creator
<http://sora.com>



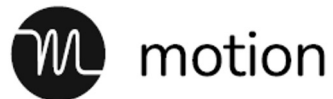
**Document Analysis and
Citation Generator**
<http://petal.org>



AI Presentation Creator
<http://typeset.com>



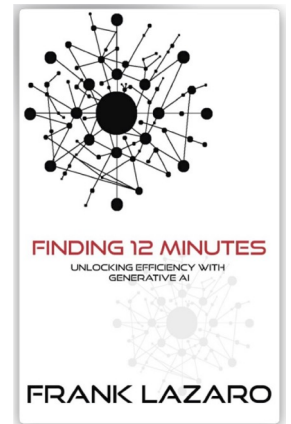
**Generate Meeting Notes and
Action Items From Recorded
Meetings**
www.plaud.ai/



**AI Calendar and Task
Management**
www.usemotion.com/



**Thought Leadership -
Content Creation**
<http://storm.genie.stanford.edu>



2025 PRC Recap Panel

Conference Presenter



Courtney Kearney
CKearney Consulting

The Inspiring Magic of Data Visualization

This session demonstrated how data visualization can transform raw numbers into compelling, actionable insights. Using a creative LEGO analogy, it emphasized the importance of structuring and presenting data in a way that drives better decision-making. We can apply these techniques to improve internal reporting, client presentations, and proposal storytelling, making complex data more accessible and persuasive.

Recap By:



Haley Palmer
Wood Rodgers, Inc.

Magic of Data Visualization

Turning Numbers into Stories

- The Power of Seeing - Shortcut to Understanding Complex Concepts
- Picking the Right Picture - Charts, Bars, Lines, Scatter Plots, etc.
- Looks are cool, but accuracy? The two are a MUST
- Data Visualization is universal
- Mixing design smarts with data science is a Superpower

Importance of Data Visualization

Anyone Can
Interact with Data



Understand
Every Correlation



Aid in
Decision-Making



Magic of Data Visualization

Data Literacy: Focus on Storytelling

- Transforming Raw Data into Actionable Insights
- Raw Data is not compelling on its own - Data alone is **NOT** enough
 - People are more inspired by stories rather than facts



Magic of Data Visualization

The Importance of Data in Decision-Making

- Supports leadership decisions with clear data
- Strengthens proposals for clients
- Persuade team to adopt new ideas
- Do the work for your audience



Magic of Data Visualization

Keys to Creating a Data-Driven Story

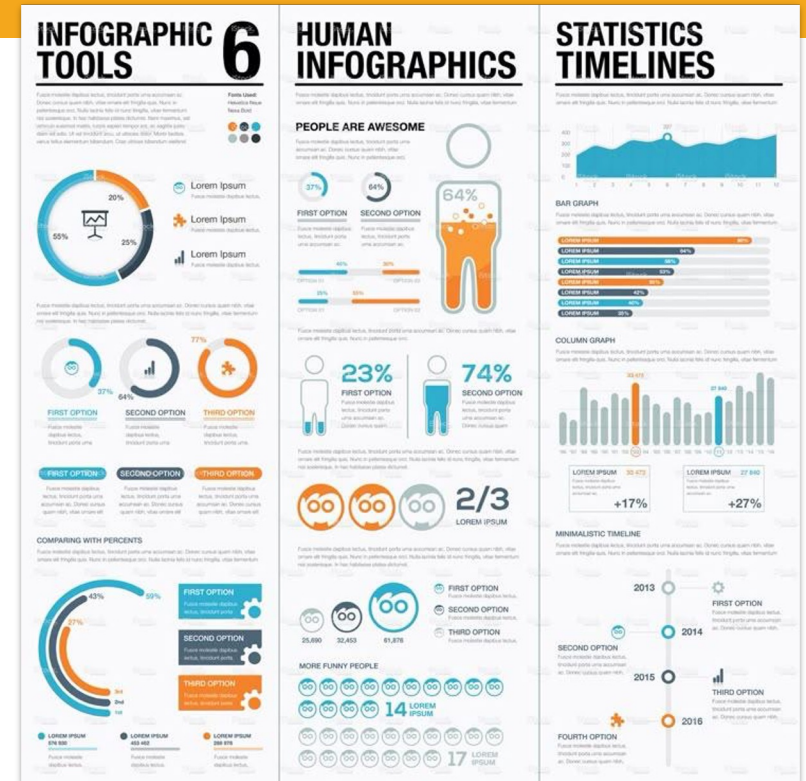
- Review and understand the data
- Draw meaningful conclusions
- Know your audience and their needs
- Be clear of the key takeaways
- Highlight



Magic of Data Visualization

Where the Story Comes to Life

- Visuals make data engaging and memorable
- Good visuals help communicate complex data
- Strong visuals support your message



Conference Presenter



Tim Asimos, CPSM
Head of Growth
Client Savvy

Beyond the Expected: How to Spark Creativity and Drive Marketing Innovation

Are you tired of stale and “expected” A/E/C marketing? It’s time to spark your creativity and push the boundaries of what’s possible. Join this session to explore how to develop and articulate a vision for marketing innovation. Learn strategies to accelerate change across your marketing organization, identify key habits for inspired, creative and innovative marketing ideas, and ways to better pitch ideas to gain leadership buy-in. We’ll also address common roadblocks marketers face as well as the detours that lead to breakthroughs.

Recap By:



Kelli Patton
Swinerton

Beyond the Expected: How to Spark Creativity and Drive Marketing Innovation

name of session

Seven Common Roadblocks to Change

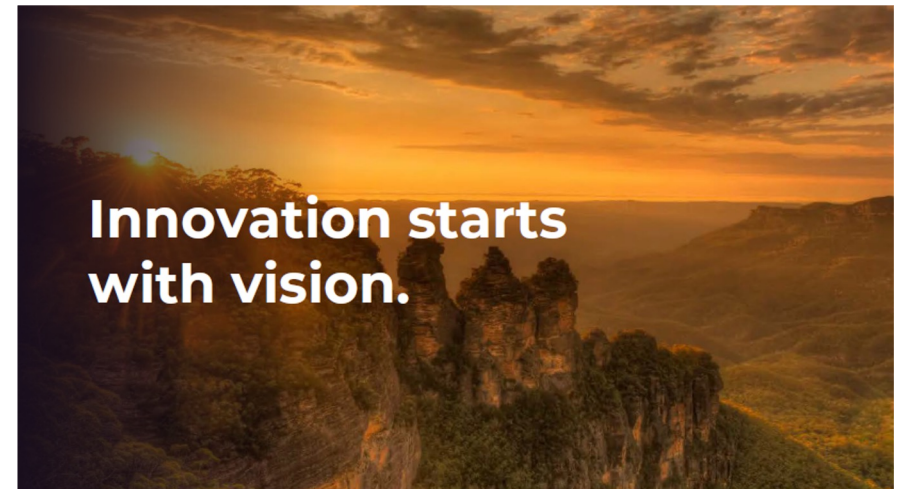
- Skepticism/Misunderstanding
- Resistance to Change/Risk Aversion
- Lack of Resources
- Short-Term Thinking/Siloed
- Lack of (True) Client Centricity
- Stopping at Ideas (that never go anywhere)
- Death by Meeting



Beyond the Expected: How to Spark Creativity and Drive Marketing Innovation

How can you be a catalyst for change?

- 1. Develop a Vision for Innovation**
 - Be a catalyst for change?
- 2. Form New Habits to Ignite Creativity**
 - Behaviors can change right away, culture will follow.
- 3. Inspire Buy-In and Accelerate Change**
 - You will need to take your ideas to management or to someone to get buy in.



Conference Presenter



Sarah Kinard
Head Bird
The Flamingo Project

How to Lead Growth Strategy for Your Firm

This session provided the means to lead and inspire internal stakeholders to create effective, sustainable growth plans. This proven method helps guide company growth that's rooted in vision and market research - and takes into consideration the ideas of everyone in the company, along with market dynamics and operational readiness.

Recap By:



Sierra Scott
RMW architecture + interiors

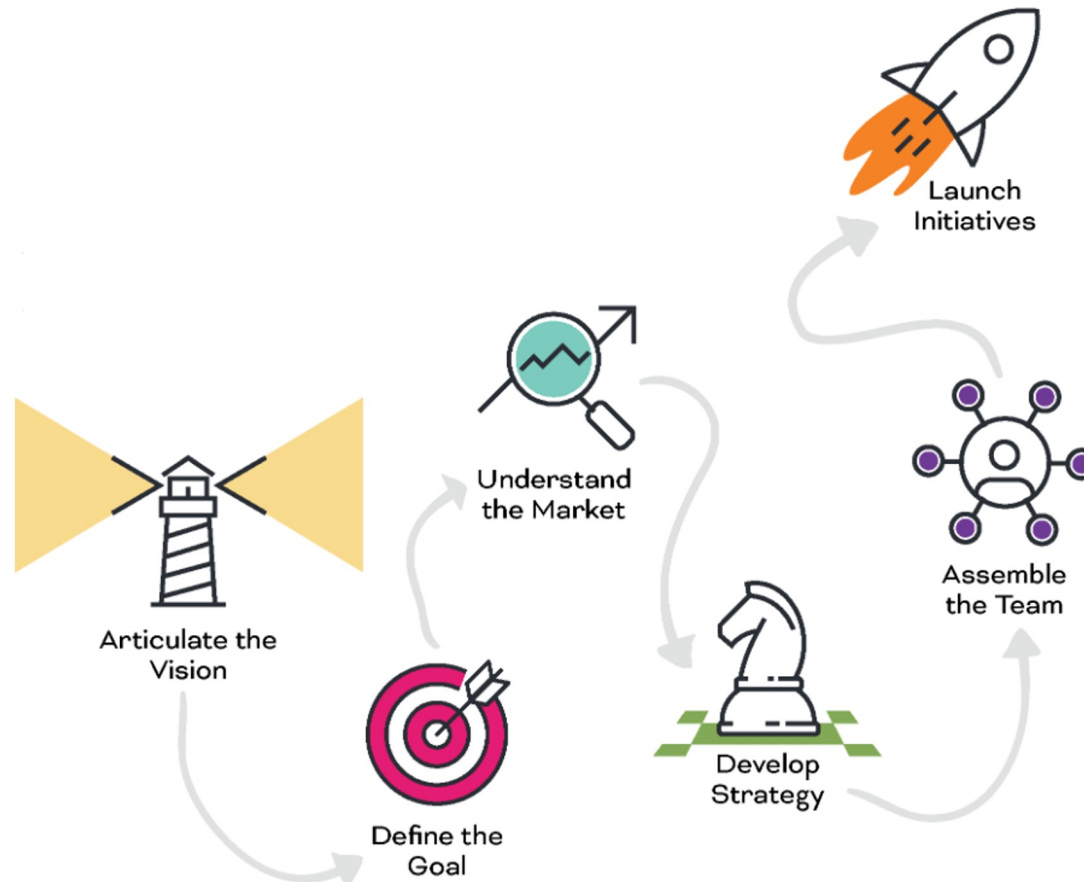
How to Lead Growth Strategy for Your Firm

A Growth Plan is a subset of a Strategic Plan - if you don't have one of those, you will struggle to enact a growth plan.

A strategic plan is rooted in the vision, mission, goals and values of your firm.

How to Lead Growth Strategy for Your Firm

The Steps:



How to Lead Growth Strategy for Your Firm

ARTICULATE THE VISION

BRAND COMPASS

PURPOSE

The 'why' behind your business - Why do clients want your brand?

MISSION

The 'how' behind your business - How you'll deliver on your purpose

VISION

The 'where' behind your business - What your company wants to achieve and how it will transform the world.

VALUES + BEHAVIORS

The 'who' behind your business - What core values you demonstrate through your behaviors?

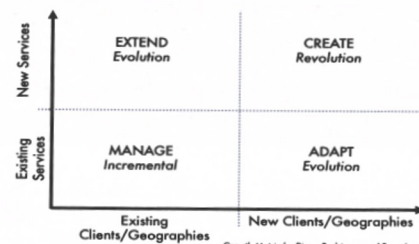


WRITE YOUR FIRM'S VISION STATEMENT

DEFINE THE GOAL

FOUNDATIONAL QUESTIONS

1. What is your firm's risk tolerance? Brand, Financial, People, M&A
2. How have your previous growth efforts played out? Organic, acquisitions?
3. Do you have leaders ready to step into this next strategy?
4. What external market factors need to be considered?
5. When does the firm want to see this vision realized?
6. Do we have set goals already? Financial? Performance? Growth?
7. When you have achieved this vision - what has changed and what has not changed?



Growth Matrix by Diego Rodriguez and Ryan Jacoby from IDEO

WHAT'S YOUR GROWTH TYPE?

- 1) Finance and Operations: Profit, Margin, Revenue
- 2) Market (Client) Position: Hit Rate, Larger Projects
- 3) Service Focus: Grow revenue within a specific service
- 4) Market Focus: Grow into a new market - sector or region

How to Lead Growth Strategy for Your Firm

DEVELOP STRATEGY				
	5-YEAR OBJECTIVE GOALS	SPONSOR	EXECUTOR	OTHER RESOURCES INITIATIVES
OBJECTIVE 1:	Win Rate			Develop Customer Experience Program
BUILD PARTNERSHIPS	Client Retention			
	Profitability			Unify BD across offices
	Revenue Growth			Establish profitability metrics
				Increasing profitability on projects begins at the pursuit and understanding the resources required...
Objective Name - Initiative Name				
Action Items			Time Frame	Champion
Action Team	Sponsor		Team	Outside Resources
	Executor			
KPIs/Targets	KPIS		Targets	



Conference Presenter



Pete Smith
President
SmithImpact

Dare to Matter—Pete Smith

This session reinforced the power of showing up. It highlighted ways to “matter more” and provided steps to increase ownership, lean into identity, and how perfection minimizes growth.

Recap By:



Christine Kenney, CPSM
Ascent

Dare to Matter

Who you are, what you do, and how you show up – Matter Most!

- Always a Choice
- Rooted in Identity
- Address the Fear
- Letting Go
- Embrace the Crazy
- Impact on Others

What does it mean to live in a
significant way?

Dare to Matter

We Always Have a Choice – though we don't always like our options

- Choose Optimism
- Choose Humility
- Choose Better



Dare to Matter

Rooted in Identity – I am therefore I do

- Feelings ☐ Actions ☐ Identity
- Identity ☐ Actions ☐ Feelings



Dare to Matter

Address the Fear – what opportunities are you missing

- Being irrelevant
- Rejection
- Looking foolish
- Being “found out”
- Missing out
- Being disliked
- Not being valued
- Being a disappointment



Dare to Matter

Letting it Go – shake off failures, learn, move on

- What role did I play?
- Why does this matter?
- Where do I go from here?



Dare to Matter

Embrace the Crazy—
do something different



Impact on Others –
who you are matters, work you do matters

- Better communication
- Positive culture
- Elevated engagement
- Greater accountability
- Effective leadership
- Higher performance
- Better decisions
- Deeper relationships

Q & A



Christine Kenney, CPSM
Ascent Environmental



Haley Palmer
Wood Rodgers, Inc.



Kelli Patton
Swinerton



Sierra Scott
RMW architecture +
interiors



Andy Larson, CPSM
Cunningham Engineering

Congratulations!

PRC Bingo Winners:

1st Place (Free Registration to PRC 2026):
Crystal Miller

2nd Place (Free Registration to the 40th Anniversary Party):
Kelli Patton

3rd Place (Free Registration to any future SMPS Sacramento Program):
Christine Kenney



2025 PRC BINGO!

Hello SMPS Sacramento members! Thank you for attending the 2025 PRC in Palm Springs! We are doing the BINGO ice breaker game again to help you make those PRC connections!

Game instructions:

- Have another attendee sign a square that relates to them showing their first and last name legibly. Only one signature per person please - no repeats. So meet multiple attendees and flex those networking skills!
- Submit your card after the conference to be entered into a raffle to win prizes like: One free entry to PRC 2026, a ticket to the 40th Anniversary Party, or one ticket to any SMPS Sacramento event in 2026. (sorry, no jointly-hosted events eligible)
- Must complete at least 75% of game to qualify for the raffle. (21 or more squares)

How to submit game card:

- Scan or take a picture of your game card and email it to the chapter president, April Willoughby at april.willoughby@gmail.com by February 24, 2025 @ 5 pm.

Raffle Info:

- Raffle will be held at our PRC Recap event on Tuesday, February 25th. You do not need to be present at the event to win. If you plan to attend the PRC Recap event please register at: <https://smps-sac.org>

Any Chapter President	Needs Coffee to Function	Any Committee Chair	Their First PRC	A Past President	Does Proposals at Their Firm	Alaska Chapter Member
CPSM	Works for a GC Firm	Serves on a Chapter Board	A PRC Volunteer	A PRC Sponsor	SMPS Member for Over 5 Years	Attending a 2025 PRC Social Event
Any Non-Sacramento chapter SMPS Member	Seattle Chapter Member	Attended 4 or More PRCs	Sacramento Chapter Member	An SMPS Member you Have Never Met Before	Loves to Travel	Works for an Architecture Firm
Works for an Engineering Firm	Cat or Dog Lover	Oregon Chapter Member	Does Business Development	Hawaii Chapter Member	A Chapter President-Elect	San Francisco Chapter Member

Your Name (first, last) and best contact email _____

Upcoming Events

FEBRUARY

Pacific Regional Confernce (PRC) Recap

APRIL

Community Outreach SPCA Pet Portraits (4/17)

Jobsite Tour - UCD Health Folsom Center For Health (4/22)

Improve Your Efficiency Interactive Workshop

JUNE

Marketing ½ Day Bootcamp - Day 1

Marketing ½ Day Bootcamp - Day 2

JULY

Sustainability Panel (Tentative)

AUGUST

40th Anniversary Party (8/7)

Accessibility Training

* *Events are subject to change.*

Learn More & Register >>

<https://smpls-sac.org/calendar.php>

Access PRC Materials



Scan the QR Code above to access the PRC Materials.

Thank you!



smps[®] | Pacific
Regional Conference

SAVE THE DATE

★ GOING FOR GOLD ★
Achieving Excellence in A/E/C

March 18-20, 2026
Hyatt Regency Hotel
Seattle, WA

