



EMERGING TRENDS

in AEC Marketing and Business Development

2027

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Business Transformed Through Marketing Leadership

The mission of the SMPS Foundation is to deliver intelligence and insights for growth professionals and leaders to help them navigate trends, change, and business evolution in a highly competitive marketplace.

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SN's perspective is grounded in deep industry specialization, extensive research, and daily work alongside AEC firms across the country. This provides a unique view into the forces reshaping the industry, from evolving client expectations and changing buyer behavior to technology, talent, ownership transition, and the growing demand for more intentional, measurable growth.

Bringing together expertise across advisory, technology, accounting, and tax, SN helps AEC firms connect insight and strategy with execution. Its Strategic Growth Advisory services include:

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- Seller-doer development and training
- Client experience and relationship strategy
- Growth strategy and performance improvement
- Leadership alignment and organizational effectiveness

SN believes that meaningful growth does not happen in silos. It requires alignment between business strategy, people, clients, data, technology, and execution.

That same belief drives SN's commitment to advancing the AEC industry through research and thought leadership. By studying the trends shaping firms and the people who lead them, SN helps turn industry intelligence into practical insight, giving leaders a clearer view of what is changing, why it matters, and where to focus next.

Industry intelligence. Strategic perspective. Practical action.

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Letter from the SMPS Foundation President

To our colleagues across the AEC industry,

The architecture, engineering, and construction (AEC) industry is facing new expectations from clients, rapid advances in technology, evolving buyer behavior, and continued pressure to grow with greater focus and accountability. As these forces reshape the market, the work of marketing and business development (BD) is becoming more strategic, more integrated, and more essential to firm performance.

That is why the SMPS Foundation continues to invest in research that helps our industry look ahead. This report is designed to do more than identify emerging trends. It is intended to help firm leaders, marketers, business developers, and growth teams understand what those trends mean for the future of their firms and the people who help them win, retain, and grow work.

For firm leaders, the findings offer a clearer view of where investment may be needed: in talent, client relationships, technology, data, and measurement. For marketing and BD professionals, the report provides insight into how expectations are evolving and where new skills, tools, and approaches will be required. For both audiences, the message is clear: firms that respond intentionally will be better positioned to compete in a more complex market.

This research also reinforces the growing strategic value of marketing and BD in AEC firms. These functions are no longer defined only by proposals, events, communications, or relationship-building activity. Increasingly, they sit at the intersection of growth strategy, client experience (CX), market intelligence, visibility, technology adoption, and firmwide accountability. Understanding that broader role is essential for firms that want to grow smarter, deepen client relationships, and make better decisions about where to focus their resources.

The findings in this report are grounded in research, but their value depends on how they are applied. We encourage readers to treat the report as both a conversation starter and a planning tool: a way to evaluate readiness, discuss future capabilities, and consider whether current systems, talent strategies, and client-development practices are aligned with where the market is headed.

The SMPS Foundation is grateful to the professionals and firm leaders who contributed their time, perspectives, and insight to this research. Their participation helps strengthen not only this report, but also the broader body of knowledge available to the AEC marketing and BD profession.

We hope this report helps you see what is ahead, understand why it matters, and take meaningful action in your own firm.

Sarah Kinard

President, *SMPS Foundation*

Head Bird, *The Flamingo Project*

Introduction

Across the different phases of research for this report, three connected themes emerged. Each one represents a different pressure point for firms: the people who lead and support growth, the clients who create the greatest future opportunity, and the systems that make growth more intentional, measurable, and scalable.

1 The first pressure point is talent. Artificial intelligence (AI) and automation are already changing the tasks associated with marketing and BD, from research and content development to proposal support and data management. But that shift does not reduce the value of human skill. It raises the value of judgment, critical thinking, listening, communication, and the ability to apply new tools in ways that create business value.

2 The second pressure point is the existing client base. AEC firms often point to repeat work as evidence of strong relationships, but repeat work alone does not mean a firm is capturing the full range of opportunities within its current clients. Future growth will require more intentional client experience (CX), deeper relationship mapping, stronger account planning, and a clearer understanding of where existing clients need more from the firm.

3 The third pressure point is technology. Data, AI, automation, and changing buyer behavior are no longer separate from marketing and BD strategy. They are becoming part of how firms identify opportunities, position expertise, manage visibility, respond to procurement, and measure performance. For many firms, the challenge is not whether technology matters, but whether the underlying systems, data, and workflows are ready to support it.

These trends are not isolated.

Talent matters because firms need people who can think strategically, communicate clearly, interpret data, and apply new tools with judgment.

Clients matter because future growth depends on more than winning new work; it depends on deepening relationships, improving experiences for clients, and expanding the value firms provide to the clients they already serve.

Technology matters because data infrastructure, AI-enabled workflows, and changing buyer behavior are altering how firms pursue, position, and prove their value.

The ranked findings also surfaced two recurring implications for firm leaders: how firms organize growth and how they prove value. The Additional Trends section discusses the evolution of siloed marketing and business development functions into integrated Growth Departments as well as the increasing need to demonstrate return on investment (ROI) for these functions within a firm.

Together, the findings point to a broader shift in the role of marketing and BD. These functions are becoming more integrated with firm strategy, CX, technology, and leadership decision-making. The firms that respond effectively will not be the ones that simply add new tools or track more activity. They will be the firms that build the skills, systems, and client strategies needed to compete in a more complex market.

This report is intended to help both firm leaders and marketing and BD professionals evaluate where they are today and where they need to focus next. Each trend begins with a snapshot page that highlights the core idea, key findings, readiness gaps, risks, and metrics to watch. The sections that follow provide deeper discussion of the research, firm readiness, risks, and related findings shaping the future of the profession, with readiness questions and action steps designed to support planning conversations inside firms.

The findings draw on secondary research, interviews, focus groups, and survey input from AEC firm leaders and marketing and BD professionals. A full description of the research approach is included at the end of this report.

RANKED FINDINGS

Survey participants ranked the specific issues they believe will have the greatest impact on AEC marketing and business development in the coming years. The research team then grouped those findings into three broader themes: the changing talent stack, the future opportunity within current clients, and the need for a technology-first mindset. The rankings also highlighted related priorities around growth-team alignment and demonstrating marketing and business development ROI, which are woven into the trend discussions because they reflect how firms organize growth, measure value, and build the systems needed to support change.



Ranked Research Issue	Percent Ranked "Highly Impactful"	Theme
Strategic/critical thinking and communication skills	84%	Trend 01: Changing Talent Stack
Hiring/upskilling in AI, data collection, and data literacy	58%	Trend 01: Changing Talent Stack
Client experience as a competitive differentiator	74%	Trend 02: Current Clients
Growth via existing clients	65%	Trend 02: Current Clients
Improved data management and infrastructure	71%	Trend 03: Technology-First Mindset
AI-enabled workflows and automation	68%	Trend 03: Technology-First Mindset
Expertise-led visibility	56%	Trend 03: Technology-First Mindset
Changing buyer behavior/procurement	43%	Trend 03: Technology-First Mindset
Growth Departments	53%	Additional Trends
Demonstrating marketing/BD ROI	47%	

EMERGING TREND THEMES

Three themes emerged from the research, each reflecting a different pressure point shaping the future of AEC marketing and BD: people, clients, and the systems that support growth.

01

CHANGING TALENT STACK

From production support to judgment-driven growth roles.

- Strategic and critical thinking
- Advanced communication skills
- Data, technology, and AI fluency

84%

rank thinking and communication skills highly impactful

58%

rank skills in AI and data collection/data literacy highly impactful

READINESS TAKEAWAY:

Few firms feel fully ready to build the new talent stack.

02

FUTURE LIES WITH CURRENT CLIENTS

From repeat work to intentional client growth.

- Client experience as a differentiator
- Existing client development
- Account growth and cross-selling

74%

rank CX highly impactful

65%

rank existing-client growth highly impactful

READINESS TAKEAWAY:

Firms see the opportunity, but fewer feel ready to act on it.

03

TECHNOLOGY-FIRST MINDSET

From tools and platforms to growth infrastructure.

- Data management and infrastructure
- AI-enabled workflows and automation
- Changing buyer behavior

71%

rank data infrastructure highly impactful

68%

rank AI workflows highly impactful

READINESS TAKEAWAY:

Most firms are still early in making the shift.

THE CHANGING TALENT STACK

Marketing and BD roles are being reshaped by AI, automation, data, and changing expectations for strategic value. The work still depends on relationships and communication, but the role is moving beyond production support. Future success will require professionals who can think strategically and critically, communicate clearly, interpret information, and apply technology with sound judgment.

“ The pace of AI demands both power skills and technology fluency.

THE IMPACT / READINESS GAP

POWER SKILLS ARE RISING IN IMPORTANCE

84% Critical thinking and communication skills rated highly impactful VS **30%** Highly ready to provide training

TECHNOLOGY FLUENCY IS BECOMING PART OF THE ROLE

58% Hiring and/or upskilling in AI and data collection /data literacy rated highly impactful VS **15%** Highly ready to provide training

WHY IT MATTERS

AI is increasing the pace and complexity of marketing and BD work, but many firms are not yet preparing people for that reality. Teams need power skills and technology fluency to evaluate information, apply new tools effectively, and contribute more strategic value.

RISK OF INACTION

Firms may move faster than their people can adapt, widening skill gaps, confusing career paths, and increasing talent pressure.

TREND METRICS TO WATCH

- Training participation and completion
- AI and data literacy adoption
- Proposal quality and reduced rework
- Staff retention and role progression
- Time saved through automation and reinvestment

LEADERSHIP QUESTION

Are we developing the capabilities our firm will need next, or relying on roles designed for how the work used to be done?

Trend 1:

The Changing Talent Stack

The pace of AI demands both power skills and technology fluency.

There is no standard path into the career of marketing and BD professionals in the AEC industry. A licensed architect earns an accredited degree, trains in practice, and passes a licensure exam; no such track exists in the built environment for marketing professionals. As a result, practitioners arrive from myriad backgrounds, including marketing, communications, English, journalism, speech, graphics, technical fields, disciplines outside the AEC industry, and entirely unrelated industries.

“There is a gap in the marketing/BD talent pipeline between two- and ten-years’ experience. People don’t see the AEC space as a marketing career.” – Qualitative Research Participant

Through the six SMPS Domains of Practice, and publications like *BLUEPRINTS: Guides for Marketing and Business Development Departments in the A/E/C Industry*, the Society has identified the skills necessary to succeed in these roles. But these skills are rapidly changing, and marketing/BD professionals are not necessarily equipped for the changes that are already happening today and coming tomorrow.

The Role of Essential Business Skills in the Era of AI

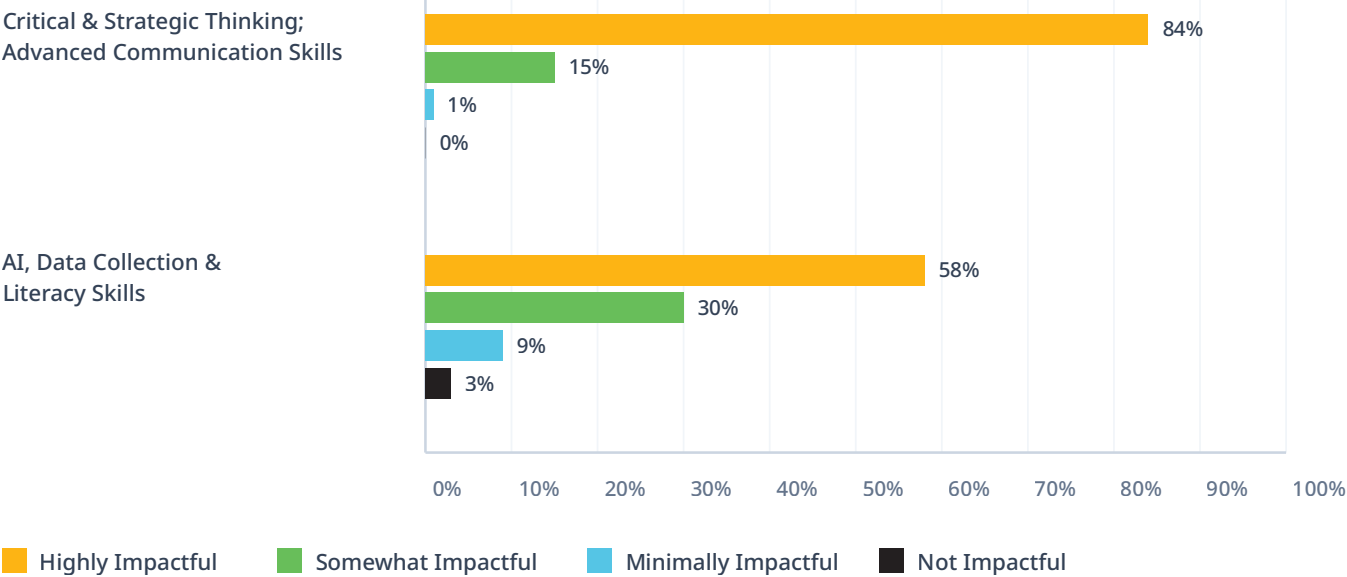
The 2026 *Emerging Trends in Marketing and Business Development*¹ report from the SMPS Foundation and FMI Consulting identified three areas where marketing and BD professionals must continue to evolve:

- Data-driven
- Tech-enabled
- Strategic

The 2027 emerging trends research builds on that finding. Strategic thinking, critical thinking, written communication, and verbal communication skills were identified as the most impactful trend in the research. Eighty-four percent of survey participants ranked these skills as highly impactful to the future of marketing and BD, while another 15 percent rated them as somewhat impactful.

These power skills are not new to the profession, but their importance is increasing. In an environment where AI and automation can support research, drafting, content development, and production, the value of judgment, communication, listening, and strategic thinking becomes more important, not less. Firms will need professionals who can question assumptions, evaluate information, communicate clearly, and translate technical detail into language that matters to clients and decision-makers.

Future Skills for Marketers & Business Developers



Earlier SMPS research provides useful historical context. In *Marketing 2022: A Survey Exploring Current and Future AEC Marketing Practices*³, verbal and written communication were identified as the top two current skills for marketing and business development professionals, followed by storytelling and critical thinking. When respondents were asked to forecast the most important skills three years into the future, verbal and written communication remained at the top.

The 2027 research does not replace that finding; it reframes it for a new environment. Communication, critical thinking, judgment, and strategic thinking remain essential, but they now must be applied in work increasingly shaped by AI, automation, data, and changing client expectations. The skillset is not shifting away from power skills. It is expanding to require those skills alongside technology fluency.

Critical thinking involves the analysis and synthesis of information to inform decisions. When we question assumptions, identify fallacies, and assess evidence, we are thinking critically. Critical thinking asks whether the information and conclusions are sound.

Strategic thinking is different, requiring understanding of the larger context of goals, trade-offs, time horizons, and competitive dynamics. When we spot patterns, anticipate consequences, and make decisions that move toward a desired outcome, we are thinking strategically. Strategic

thinking asks where are we going and how do we get there.

Across all firm sizes and types, survey participants viewed power skills as highly impactful. Although the architectural/engineering firm segment and 250–499 employee size segment of the research participants did not rank this as the most impactful trend, they still ranked it highly.

The New Skillset: AI/Technology Fluency

Beyond these power skills, a technical component is also becoming critical to future success. The research reinforces the importance of technology fluency and infrastructure: 71 percent of survey participants rated improved data management and infrastructure as highly impactful in the coming years, and 68 percent said the same of AI-enabled workflows or automation.

This creates a clear need to upskill marketing and BD staff in AI use, data collection, and data literacy. The research supports this need: 58 percent of survey participants identified hiring new staff or upskilling existing staff in AI use, data collection, and data literacy as highly impactful to future success.

This skill need is reinforced beyond the AEC industry. In *Marketing in the Age of Disruption: The Skills Marketers Need in 2025 and Beyond*⁴ from the American Marketing Association (AMA), generative AI and data and analytics were the top two skills expected to become more important over the next five years. Customer experience ranked third, further underscoring the connection between technological fluency, client understanding, and future marketing effectiveness.

Although AI use, data collection, and data literacy did not rank highly enough to stand alone as one of the three overarching trends, they are essential to the changing talent stack. The future marketing and BD professional will need to work across both power and technical skillsets, using new tools while applying the judgment, communication, and strategic thinking that technology cannot replace.

AEC Firm Readiness

AEC firms are not yet fully ready for this evolving talent stack.

When asked how prepared firms were to provide training around strategic thinking, critical thinking, and advanced communication skills, only 30 percent of firms answered they were highly ready. Another 40 percent of firms believe they are somewhat ready, indicating that some firms are beginning to plan for the necessary upskilling. However, 30 percent of surveyed firms reported that they were minimally ready or not ready at all.

Preparedness for Future Skills

AEC firms are even less prepared to deliver training in AI use, data collection, and data literacy. Only 15 percent of survey participants identified their firm as highly ready to provide training in this area, with 35 percent indicating they were somewhat ready. This suggests that half of surveyed firms may not yet have the training structures needed to prepare staff for one of the most significant changes affecting the future of marketing and BD work.

The AMA report included similar findings regarding the required future talent stack. The top ranked skills for marketing leaders, by importance today were:

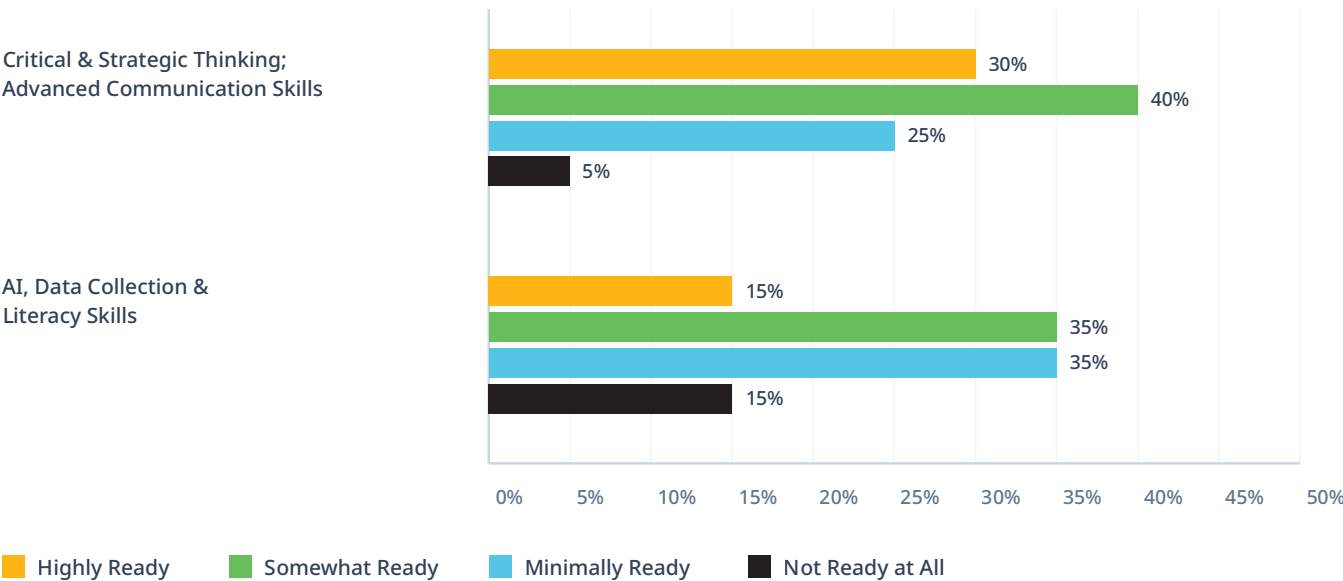
1. Communication
2. Critical Thinking
3. Adaptability

However, when looking at the competency gap, these areas rose to the top:

1. Data and Analytics
2. Digital Marketing
3. Proving ROI

The same pattern appears in the 2027 emerging trends research. Elevated strategic and critical thinking, enhanced verbal and written communication skills, and data literacy are challenges for marketing and BD professionals both inside and outside of the AEC industry.

Preparedness for Future Skills





“In the not-too-distant future, AI use in marketing, business development, and project delivery will be table stakes. Firms that fail to integrate these technologies will not remain competitive. The true differentiator will be how effectively we apply human judgment to leverage these tools—creating business value and client experiences that exceed what technology can deliver on its own.”

- Nathan Hamm, Chief Strategy Officer, SCS Engineers

The pace of AI development adds urgency to this readiness gap. In June 2025, Sam Altman, the CEO of OpenAI, developers of the ChatGPT large language model (LLM), described AI as having crossed a significant threshold⁵. Whether firms adopt that framing or not, there is no returning to a pre-AI operating environment. Industry professionals and their companies are working to keep pace with the rapid changes in AI capability.

The firms best positioned for what comes next will be those that understand the importance of power skills coupled with technology skills, and that ensure their people have the support, training and opportunities to stay at the forefront of this changing talent stack.

Risk of Inaction: Skills and Talent Pressure

When survey respondents were asked to identify the greatest risk to the future of marketing and business development, talent concerns rose near the top. Fifteen percent selected talent turnover or a reduced talent pipeline, while 14 percent selected the lack of required skills in marketing and business development staff.

These concerns align directly with the changing talent stack. As AI, automation, data, and technology fluency become more central to the work, firms cannot rely on informal learning or legacy career paths to keep teams prepared. Without intentional development, firms risk widening the gap between what the work requires and what their people are equipped to deliver. The result is not only a training issue. It can

become a retention, recruiting, performance, and competitiveness issue as expectations rise and the available talent pipeline becomes more constrained.

Is Your Firm Ready for the Changing Talent Stack?

**On a scale of 1-5, score your firm where
1=(Early Stage) and 5=(High Strength):**

1. Critical & Strategic Thinking – Staff can analyze complex problems and think beyond tactical execution (1 2 3 4 5)
2. Advanced Communication Skills – Team effectively tailors messaging across audiences, channels, formats (1 2 3 4 5)
3. Data & AI Literacy – Professionals can interpret data and apply AI and technology tools in daily work (1 2 3 4 5)
4. Learning Culture & Upskilling – Firm invests in continuous professional development and skills training for marketing/BD staff (1 2 3 4 5)
5. Talent Acquisition Strategy – Hiring practices target these evolving competencies and market demands (1 2 3 4 5)



The future AEC business developer isn't just a relationship builder; they are the translator of technical expertise into business value. Those who can connect strategy, communication, and technical depth will lead the market."

- Alison Murphy, Vice President Marketing & Business Development, OCMI



THE FUTURE LIES WITH CURRENT CLIENTS

AEC firms often point to repeat work as evidence of strong client relationships. But future growth will require more than being invited back. Firms will need to manage CX more deliberately, build relationships beyond the primary project contact, identify account growth opportunities, and make existing clients more aware of the firm's full range of services.

“ Operationalize CX to convert trusted relationships into growth.

THE IMPACT / READINESS GAP

CLIENT EXPERIENCE IS BECOMING A DIFFERENTIATOR

74% Client experience rated highly impactful VS **22%** Highly ready to leverage

EXISTING CLIENTS ARE A GROWTH OPPORTUNITY

65% Growth through existing clients rated highly impactful VS **32%** Highly ready to drive growth

WHY IT MATTERS

Firms may feel strong in repeat client revenue, but that does not always translate into account growth. While 74 percent rate themselves above average or far above average in repeat revenue, more than 45 percent rate themselves average or below in cross-selling and account growth.

RISK OF INACTION

Firms that assume current clients are already “taken care of” may leave growth untapped. Without stronger CX systems, account planning, and relationship mapping, they risk missed growth, shallow relationships, and vulnerability when key contacts change.

TREND METRICS TO WATCH

- Repeat client revenue
- Expansion revenue from existing clients
- Cross-selling and account growth
- Client satisfaction or client experience scores
- Voice-of-client participation
- Relationship depth within key accounts
- Referrals from existing clients

LEADERSHIP QUESTION

Are we managing current client relationships as future-growth assets, or assuming project delivery alone will keep those relationships strong?

Trend 2:

The Future Lies with Current Clients

Operationalize CX to convert trusted relationships into growth.

AEC firms are not starting from scratch when it comes to future growth. Many already have trusted client relationships, repeat work, and long-standing project history. The opportunity is to move beyond informal relationship management and use CX as a systematic way to understand current clients, identify unmet needs, and convert trusted relationships into intentional revenue growth.

Current Clients as a Revenue Growth Strategy

Business-to-business customer acquisition costs (CAC) have increased 60 percent over the past five years according to research from Paddle⁶, and yet Invesp, a conversion optimization agency, found that 44 percent of companies focus primarily on acquiring new clients⁷. Prior SMPS Foundation / Stambaugh Ness research, published in *AEC.BD: Building Business Development Success in a Post-Pandemic World*⁸, found that the top responsibility for dedicated business developers is setting up appointments with prospective clients. Combined, these findings point to a familiar imbalance: firms often invest heavily in finding new clients while under-systematizing growth from the clients they already have.

An oft-stated axiom is that the greatest competitor is the status quo, yet so much of the AEC marketing and BD engine is focused on unseating incumbents. Dedicated business developers are often judged on net new logos brought into the firm, and seller-doers are rarely trained or supported in the skillset required to cross-sell effectively. They may be good at bringing in more work for their practice area or geographic location, but much of the broader revenue potential within an existing client can remain untapped.

The 2027 emerging trends research reinforces this opportunity. Two of the highest ranked trends are both client-focused: 74 percent of survey participants rated CX as a competitive differentiator as highly impactful, while 65 percent said the same of future company growth through existing client development. When looking across firms by level of growth, those firms anticipating no change in year-over-year growth ranked CX as a

competitive differentiator as the most impactful trend to their firms. Together, these two trends suggest that future growth is not only about maintaining client relationships, but also about building the systems to understand, expand, and act on them.

From Repeat Work to Account Growth

The Pareto Principle, often called the 80/20 Rule, suggests that 80 percent of outcomes are driven by just 20 percent of contributing factors. Applied to firm revenue, this distribution tends to hold as a useful approximation: a significant share of firm revenue often comes from a relatively small group of current clients, while a smaller share comes from new clients. While not a precise measurement, this general pattern has been observed in the AEC industry for decades. Regardless of whether firms are focusing on existing client or new client growth, the importance of smart growth that does not impact profitability was a concern identified by several of the interviewees in the qualitative research.

This raises an important question: why does so much marketing and BD effort remain focused on bringing in new clients? Much of it lies in an assumption that existing clients are “already taken care of” by regular project interactions. The research found that 74 percent of survey respondents believe their firms are above average or far above average when it comes to repeat client revenues. Yet when asked about cross-selling and account growth, more than 45 percent believe their firms are average, below average, or far below average.

This discrepancy suggests that repeat client revenue and account growth are not the same thing. A firm may continue to win work from a client without fully understanding the client's broader needs, expanding the relationship across services or geographies, or identifying where the firm can deliver more value. For high-growth firms, this distinction appears especially important. The discrepancy also points to an opportunity for firms to use CX more intentionally to identify unmet needs, strengthen account planning, and grow existing relationships. Although growth via existing client relationships was ranked highly across all segments, high growth firms found this to be the most impactful to the future. That finding reinforces why current-client growth deserves attention in firm growth strategy.

CX as the Growth System

CX is the system that helps firms move from relationship familiarity to actionable client insight. This focus reinforces findings from the prior SMPS Foundation and FMI Consulting *Emerging Trends in Marketing and Business Development* report¹, while the 2027 research adds a more specific growth layer: CX is not only about satisfaction or retention. It is a way to understand current clients more deeply, identify unmet needs, and connect trusted relationships to revenue growth.

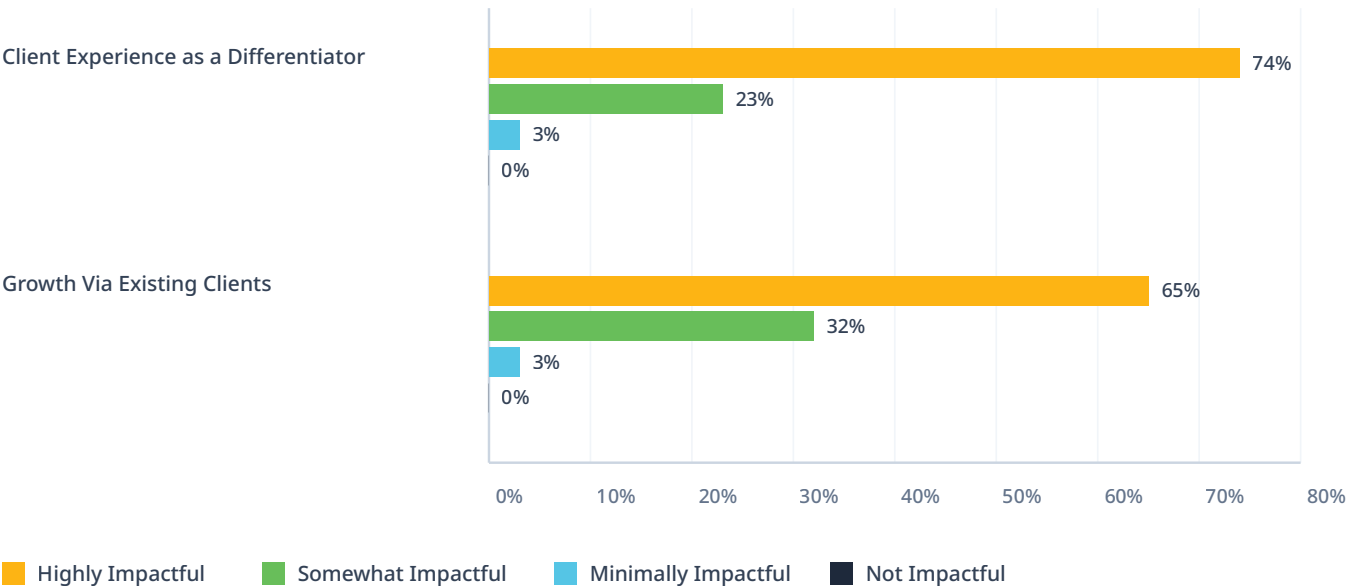
Earlier SMPS research also shows that CX is not a new concern for the AEC industry. In *Marketing 2022: A Survey Exploring Current and Future AEC Marketing Practices*³, only 18 percent of firms represented in the survey had an in-place CX strategy, yet CX was projected to become the top marketing approach by 2022.

The 2027 research builds on that earlier finding by connecting CX more directly to current client revenue growth. CX is no longer only about satisfaction, retention, or service quality. It is becoming the system firms need to capture client insight, identify unmet needs, support account growth, and turn trusted relationships into intentional revenue growth.

The SMPS Foundation and ClientSavvy report *Client Experience in the A/E/C Industry: Benchmarks, Insights, and Trends*² further reinforced the implementation gap. That research found that only 4.2 percent of AEC firms identified CX as encultured, while 19.5 percent described CX as maturing. In other words, CX has been top-of-mind for AEC firms for many years, but implementation has lagged behind interest and intent.

That implementation gap often shows up in consistency across the firm.

Focus on Existing Clients





We are trying to think like one company when it comes to client experience. The journey shouldn't be different from office to office.”

– Qualitative Research Participant

That gap is significant because CX provides a structured way to capture what clients value, where relationships are strong or weak, what needs are emerging, and where additional revenue opportunities may exist.

According to ClearlyRated, CX now outpaces price and product as the top competitive differentiator in business-to-business environments¹⁰.

Additional research from Stambaugh Ness found that although client experience ranks tenth in current strategic plan priorities for AEC firms, it is anticipated to jump to the fifth most common priority in future strategic plans¹¹. For firms focused on current-client revenue growth, CX is not only a differentiator. It is the system that makes client insight usable.

Relationship Depth and Prepositioning

Within the AEC industry, pursuing more contracts with existing public and private clients often still involves formal procurement, requests for proposals (RFPs), and shortlist interviews. However, the most successful firms are often prepositioning for the work months or even years in advance. Research completed by SMPS members W. Bruce Lea and J. Rossi⁹ and conducted three times over a 20-year period found that in 89 percent of pursuit wins, an existing long-term relationship with the client was already in place.

That finding reinforces the importance of relationship depth, but it also points to the need for structure. A long-term relationship can create an advantage, but firms need systems to make relationship knowledge visible, actionable, and connected to firmwide growth strategy. Without that structure, relationship intelligence can remain trapped with individual project managers, seller-doers, or account leads.

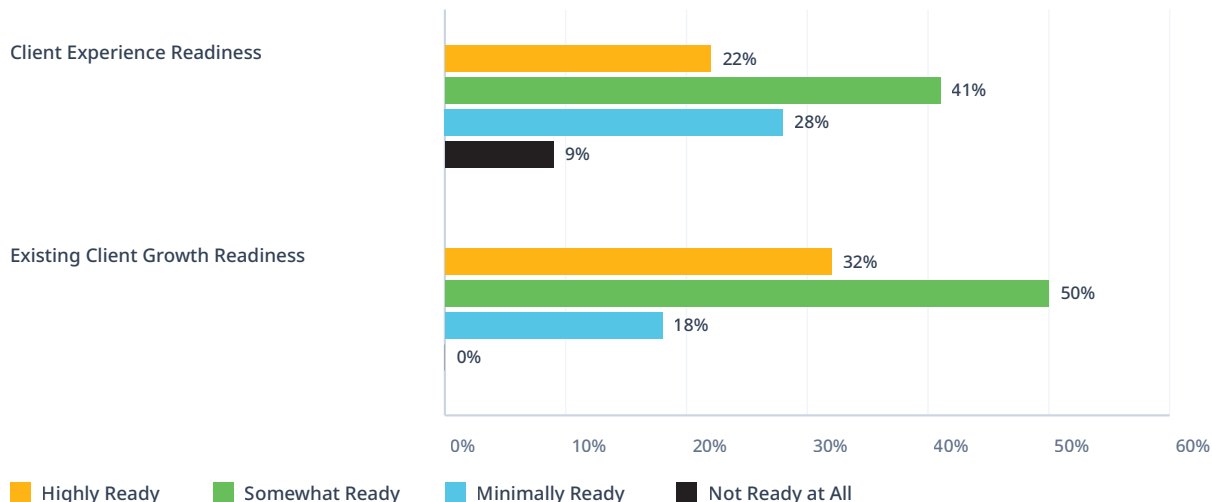
AEC Firm Readiness

Despite the impact of these client-focused trends, firm readiness remains limited. Only 22 percent of firms report being highly ready to leverage CX as a differentiator, and only 32 percent report being highly ready to drive growth through existing clients.

This readiness gap matters because current-client growth requires more than strong relationships or successful project delivery. Firms need processes for gathering client feedback, mapping relationships, identifying unmet needs, sharing client insight across the firm, and connecting that insight to account planning and revenue growth.

The findings suggest that firms recognize the importance of current-client growth, but many have not yet built the CX systems needed to make that growth intentional, measurable, and repeatable.

Preparedness for Existing Client Focus



Risk of Inaction: Complacency with Current Clients

The client-related risk is not only declining loyalty. In fact, declining client loyalty ranked low among the greatest risks, with only five percent of respondents selecting it. That may indicate that many firms believe their existing relationships are stable.

The larger risk is complacency. Firms may assume current clients are already secure because repeat work continues, while missing opportunities for cross-selling, account growth, and deeper relationship development. Without a systematic approach to CX, relationship knowledge can remain informal, client insight can stay trapped with individual project managers or seller-doers, and revenue growth from existing clients can be left to chance.

“ Client experience is becoming one of the most important ways AEC firms differentiate, but the next level of CX will come from combining human judgment with smarter technology. AI-enabled processes and tools can help our staff respond faster, uncover better client insights, and spend more time on the relationship-driven work that builds trust. The firms that use technology to make client service more personal, proactive, and consistent will have a real competitive advantage.”

- Mark Bernhardt, PE, President & CEO, Burgess & Niple, Inc.

Is Your Firm Ready to Drive Growth via Current Clients?

On a scale of 1-5, score your firm where 1=(Early Stage) and 5=(High Strength):

1. Client Relationship Depth – Firm has strong multi-level relationships beyond the primary contact
(1 2 3 4 5)
2. Account Growth Strategy – A structured approach exists for expanding scope with key accounts
(1 2 3 4 5)
3. Client Experience Management – Firm has in-place strategy to monitor and improve the client experience journey (1 2 3 4 5)
4. Voice of Client Programs – Regular feedback mechanisms are in place to inform service delivery and business development decisions (1 2 3 4 5)
5. Cross-Selling & Capability Awareness – Current clients understand the firm’s full range of services and solutions (1 2 3 4 5)

A TECHNOLOGY-FIRST MINDSET

Technology is reshaping how AEC firms manage data, automate workflows, support pursuits, measure performance, and show up in an increasingly digital buyer journey. The challenge is not simply adopting new platforms. Firms need the data infrastructure, workflows, and visibility strategies that allow technology to create business value.

“ Technology-first is not tool-first. It means data-, AI-, and buyer-ready.

THE IMPACT / READINESS GAP

DATA INFRASTRUCTURE IS A GROWTH ISSUE



AI & AUTOMATION ARE MOVING INTO THE WORK



WHY IT MATTERS

Buyers are researching, evaluating, and shortlisting firms through more digital and AI-influenced pathways. Marketing and BD teams need clean data, connected workflows, and visible expertise to use AI and automation with confidence and remain discoverable where buyers are looking.

RISK OF INACTION

Firms that adopt tools without strengthening data, workflows, and visibility risk more activity without better performance, weaker AI adoption, and lower visibility in a changing buyer journey.

TREND METRICS TO WATCH

- CRM and marketing data quality
- AI and automation adoption
- Workflow efficiency and time saved
- Search, website, and referral visibility
- Expertise content engagement
- Attribution and ROI reporting
- Proposal and pursuit conversion

LEADERSHIP QUESTION

Are our data, workflows, and visibility systems ready to support how buyers search, shortlist, and make decisions now?

Trend 3:

A Technology-First Mindset

Technology-first is not tool-first. It means data-, AI-, and buyer-ready.

Across the research, technological advancements, including AI, automation, data management, and digital infrastructure, emerged as both current and future priorities for marketing and BD professionals. Where the changing talent stack treats AI fluency as a personal skill that professionals must build, this theme concerns something broader: how technology is reshaping the way the work is done and the way buyers behave.

Emerging Workflows Are Creating New Opportunities and Challenges

*The Salesforce State of Marketing, Ninth Edition*¹² report identified five data-driven priorities for marketers, including:

1. Marketers Shore Up Their Data Foundations
2. Marketers Embrace AI With an Eye on Trust
3. Full Personalization Remains a Work in Progress
4. Marketers Seek Unified Analytics
5. Deeper Relationships Emerging with Account-Based Marketing and Loyalty Programs

These priorities mirror the direction of the AEC research: stronger data foundations, AI adoption, unified analytics, and technology-supported relationship growth are becoming central to marketing and BD performance.

As AEC firms evaluate and adopt more technology, marketing and BD teams are often among the first to test how these tools can improve productivity, content development, pursuit support, and output. Because marketing and BD functions often have greater flexibility and lower risk than project delivery, they may have opportunities to lead early experimentation for their firms.

*The 2025 OpenAsset AEC Industry Trends Report*¹³ found that 53 percent of architectural and engineering firms are using AI in BD and proposal writing.

Deltak found that usage of AI had jumped from 53 percent to 70 percent in a single year in their 2026 Clarity: Architecture & Engineering Industry Study¹⁴, with business process automation being the most common use case, at 34 percent. Overall, for firms using generative AI, the research found that 50 percent employ the technology to create proposals and other marketing content – the second most common use, behind administrative tasks like taking meeting notes, which reinforces the growing role of marketing and BD as early adopters of AI-enabled content and workflow tools.

Additionally, the Unanet *AEC Inspire Report, 2025 Edition*¹⁵ found that BD and marketing use of AI exceeded that of the operations, project management, and finance/accounting functions of AEC firms.

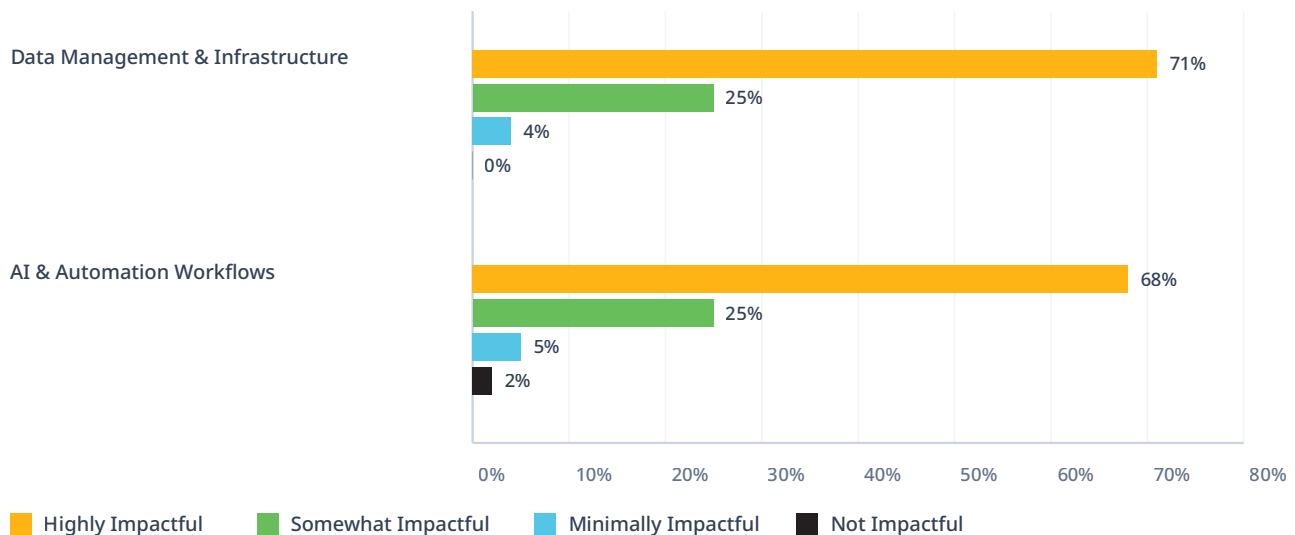
The 2027 emerging trends research reinforces the importance of that infrastructure: 71 percent of survey participants rated improved data management and infrastructure as highly impactful to future marketing and BD efforts, and 68 percent said the same of AI-enabled workflows and automation.



We are learning to leverage technology tools to do better work. It doesn't necessarily replace the work we have to do."

– Qualitative Research Participant

Technology-First Mindset



The Evolving Buyer Journey

Even as AEC firms look to incorporate newer digital technologies into their workflows, they are also facing the external impacts of technology on the buyer journey. The buying process is changing, and 43 percent of survey participants rated changing procurement processes as highly impactful, while another 43 percent rated them as somewhat impactful.

The industry is already experiencing AI-based procurement recommendations, creating concerns around intellectual property and competitive differentiation as clients feed proposals into LLMs to support decision-making. When care is not taken to protect proprietary data, there is valid concern that the approaches marketing teams use to win work could be exposed or reused in ways firms did not intend.

This evolution toward AI-based procurement is evident in the *2026 Global B2B Pulse Survey*¹⁶ from McKinsey, which found that roughly three-quarters of business-to-business buyers have high excitement around using AI in the buying process. Forrester also found that the percentage of business-to-business buyers using generative AI or conversational search has doubled over the past year, exceeding websites, subject matter experts, and business developers¹⁷ as sources of information. At the same time, third-party pre-qualification

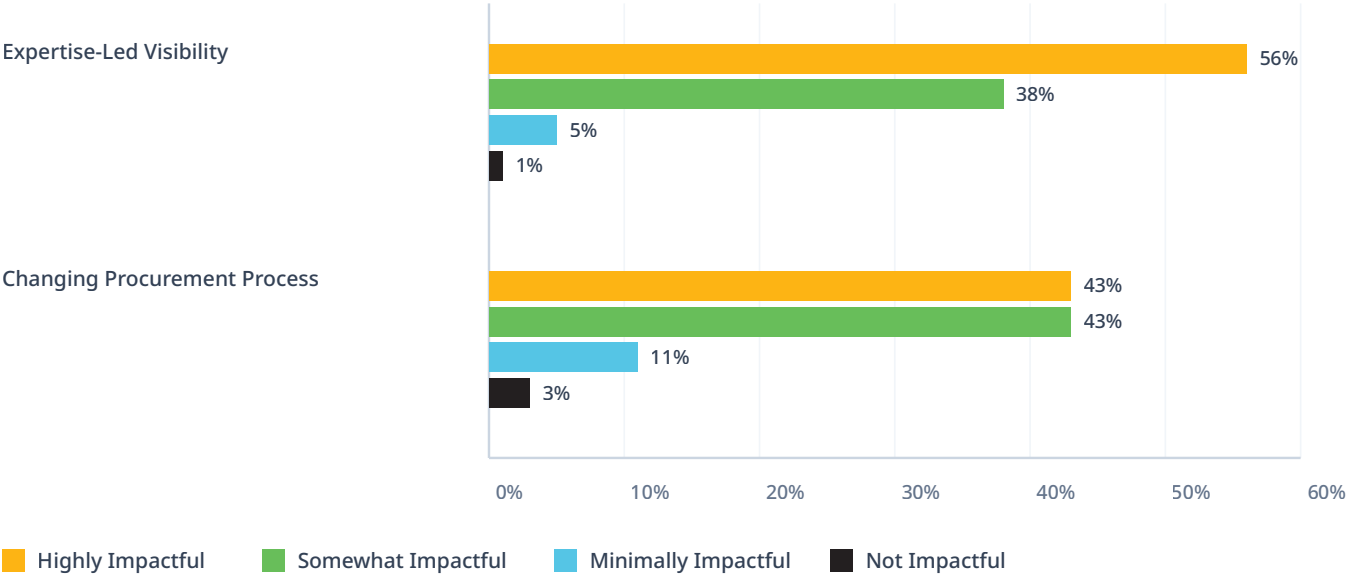
sites have grown in popularity, creating another challenge for marketers and business developers. When these sites are primarily form-based and require text responses to standard prompts, differentiation becomes harder and firms risk becoming more commoditized during the buying process.

During the qualitative stage of this research, many interviewees indicated concerns about clients relying on LLMs (such as ChatGPT and Claude) to research potential AEC firms without understanding that broader or more current information may be available through search engines, firm websites, and other channels. Search engine optimization (SEO) has expanded to include generative engine optimization (GEO), also referred to as answer engine optimization. As buyers increasingly use LLMs for self-education, AEC firms that have not invested in digital thought leadership, such as blogs, online white papers, FAQ pages, and other searchable content, may be at a disadvantage. This shift is now recognized well beyond the AEC industry. Gartner projects that traditional search engine volume will decline by roughly 25 percent by 2026 as buyers move to AI answer engines, making visibility within those engines—not just on search results pages—a new competitive requirement²³.



“Buyers are more sophisticated and informed. They are doing more research about us, especially with AI.” – Qualitative Research Participant

Client-Facing Technologies



The respondents believe expertise-led visibility (56 percent of respondents) will be highly impactful to marketing and BD in the coming years, while another 38 percent believe it will be somewhat impactful. Education-based marketing is not new, but the need to make expertise visible, searchable, and usable in AI-influenced discovery is becoming more important. The research indicates that only 19 percent of firms are highly ready for leveraging expertise-led visibility, while 38 percent are minimally ready or not ready at all.

As clients increasingly use AI to find, evaluate, and even select AEC firms, marketing functions must adapt to changing procurement processes and more AI-influenced discovery paths. This makes expertise-led visibility, digital content, and data infrastructure part of BD strategy, not just marketing communications.

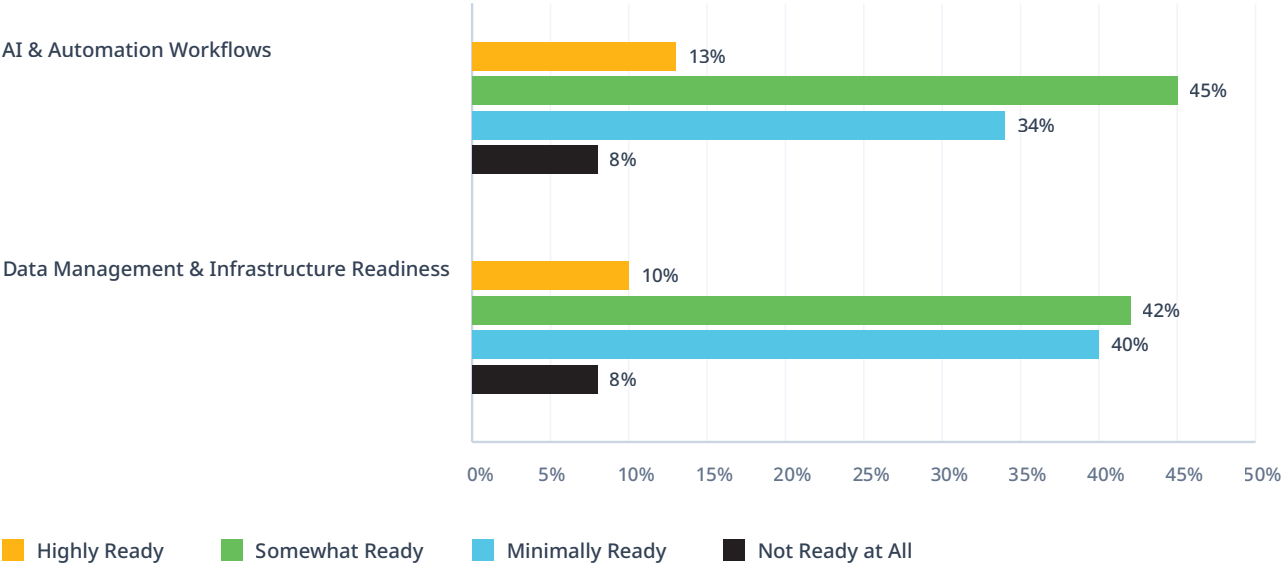
AEC Firm Readiness

However, firm readiness is lagging. Only 10 percent of survey respondents say their firm is highly ready to improve data management and infrastructure, while 42 percent say they are somewhat ready. Similarly, just 13 percent of participants rated their firms as highly ready for AI-enabled workflows

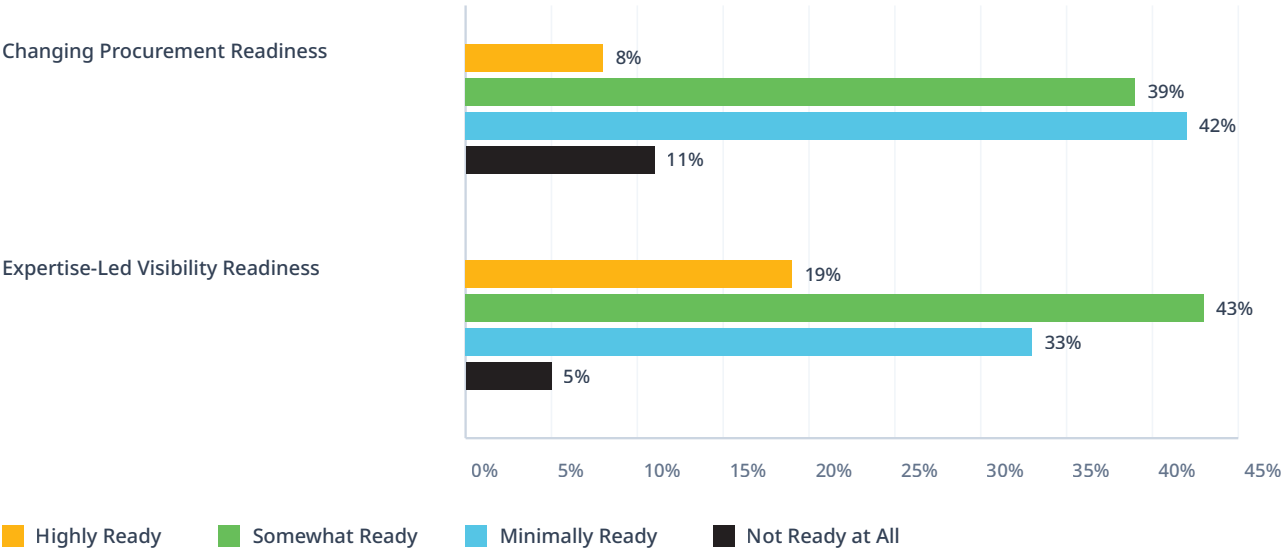
and automation, while 45 percent say they are somewhat ready. Almost half of surveyed firms report low readiness to leverage these technologies, even as they emerge as significant trends. A related observation from the qualitative phase of the research is that some firms do not yet appear to have data governance policies in place, and data governance may not yet be a formal planning priority.

Across most segments, strategic and critical thinking, along with advanced communication skills, received the highest impact ratings. Firms with 250 to 499 employees, however, showed the strongest technology-first mindset. For that segment, AI-enabled workflows and automation, along with improved data management and infrastructure, ranked as the most impactful findings. This pattern is notable because firms of this size may occupy a unique position: large enough to need better systems, stronger data infrastructure, and more scalable workflows, but still nimble enough to use technology readiness as a competitive advantage. For this segment, a technology-first mindset appears to be more than an operational improvement. It may be part of how these firms intend to compete.

Preparedness for AI & Data Management



Preparedness for Client-Facing Technologies



Risk of Inaction: Technology Pressure and Visibility

The highest-ranked risk in the research was margin compression from changing buyer expectations, selected by 18 percent of respondents. This risk connects closely to technology enablement, AI adoption, and evolving expectations for faster, cheaper, and more responsive service.

Other risk findings also connect to a technology-first mindset. Thirteen percent of respondents identified declining win rates due to poor positioning as the greatest risk, while another 7

percent specifically identified lower visibility in AI-based buyer journeys. In addition, 11 percent identified the inability to prove marketing and business development value as the greatest risk.

Together, these findings point to a broader concern: technology is changing not only how firms work, but how buyers evaluate, compare, and value them. Firms that lack clean data, strong workflows, visible expertise, and meaningful measurement may struggle to protect margins, show up in AI-influenced buyer journeys, and demonstrate the value of marketing and business development.

Use Cases for AI & Automation in AEC Marketing and Business Development

Go/No-Go Analysis:

reviewing RFPs and evaluating against past experience, performance, geography, and client type.

CRM Intelligence:

identifying stale relationships, capturing contact changes at key accounts, recommending next actions for business developers.

Account-Based Marketing:

engaging high-priority accounts and providing recommendations and content to stay in front of them.

Proposal Automation:

populating standard boilerplate, incorporating key information from the RFP, drafting new content, compliance checking.

Thought Leadership Creation:

drafting blogs, social media posts, case studies and whitepapers; repurposing existing content; conducting keyword research for content optimization.

Market Intelligence & Research:

conducting environmental scans, capturing client intelligence, creating competitive analysis, identifying industry trends.

Digital Marketing & Campaigns:

tailoring messages to segments, clients, or geographies, creating A/B testing options, scripting and editing videos, automating social posting.

Analysis & Performance Measurement:

understanding content and campaign performance, analyzing hit and conversion rates, tracking pipeline health, evaluating client retention and identified CX metrics.

“Just because we now have a proposal automation tool which allows us to quickly respond to Requests for Proposals doesn’t mean we should chase everything. We must still make valid go/no-go decisions and focus on our ideal clients.”

- Rick Ferreira, PE, President and Chief Executive Officer, Jones Edmunds

“Over my career, I’ve seen how often a firm’s best stories, strongest differentiators, and most valuable project knowledge are only as durable as the people who remember them. When project information disappears through staffing changes, retirements, or constant deadline-driven fire drills, marketing and BD teams are forced to recreate insight instead of using it. Better data management is not just an operational improvement; done well, it becomes a strategic enabler for growth, helping firms preserve knowledge, make smarter pursuit decisions, educate their teams, and turn project experience into meaningful client communication and thought leadership.”

- Russ Sanford, FSMPS, CPSM, Chief Strategy Officer, RLF

Is Your Firm Ready to Have a Technology-First Mindset?

On a scale of 1-5, score your firm's marketing and business development functions in these five areas, where 1=(Early Stage) and 5=(High Strength):

1. Data Infrastructure & Management - CRM and data systems are clean, integrated, and actively maintained (1 2 3 4 5)
2. AI & Automation Workflows - AI tools are being adopted to improve marketing and BD efficiency and quality (1 2 3 4 5)
3. Digital Client Buyer Journey - Firm understands how prospective clients research, evaluate, and select firms online (1 2 3 4 5)
4. Expertise-Led Visibility - Firm is leveraging digital-oriented tools like blogs, webinars, white papers, FAQ pages, etc. to drive GEO (1 2 3 4 5)
5. Technology Governance - Clear policies and identified champions are in place for responsible adoption (1 2 3 4 5)

ADDITIONAL TRENDS

There were two additional trends identified in the qualitative research that didn't rank as highly in the quantitative phase but are still worth recognizing. Both are more internal to companies, specifically related to marketing and business development functions.

Marketing + Business Development = Growth Department

The first is an evolution of the marketing department and business development department into a single "Growth Department." It is a trend that has been taking hold across several industries, including AEC. Fifty-three percent of survey respondents believe that this change will be highly impactful, while 37 percent feel it will be somewhat impactful.

“Fast growing firms have marketing and business development professionals in leadership roles helping the company with strategic growth.” – Qualitative Research Participant

The significance of this shift is not simply the name of the department. It is the need for better alignment across the people, systems, and activities that support growth. In many AEC firms, marketing, business development, seller-doers, CX, and technical leaders all touch the same pursuit and client relationships, but they do not always work from the same strategy, data, or accountability structure.

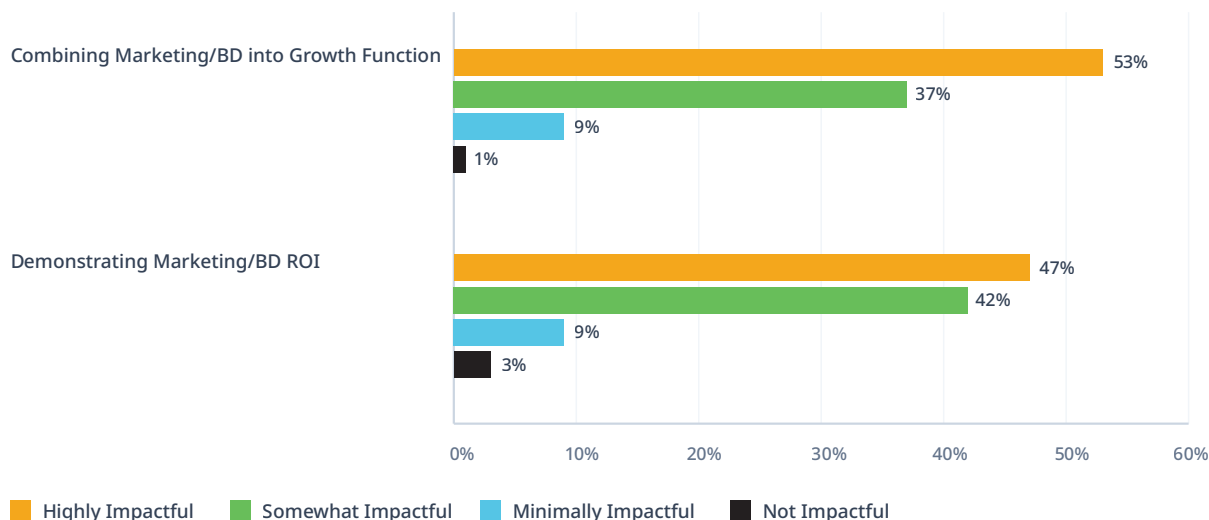
The pattern is visible beyond the AEC industry. In the broader business-to-business market, similar models often appear under the banner of revenue operations. Deloitte's 2025 research found that roughly 90 percent of companies report having some form of unified revenue function in place, yet only about 10 percent consider it fully mature²⁴. That adoption and maturity gap echoes the AEC findings in this report.

Prior SMPS Foundation and Stambaugh Ness research published in *AEC.BD: Building Business Development Success in a Post-Pandemic World*⁸ found that 89 percent of companies utilize seller-doers to some degree, while 78 percent have at least one dedicated business developer on staff. That creates a coordination challenge. Without shared systems and clear roles, firms can have many people contributing to growth while still moving in different directions.

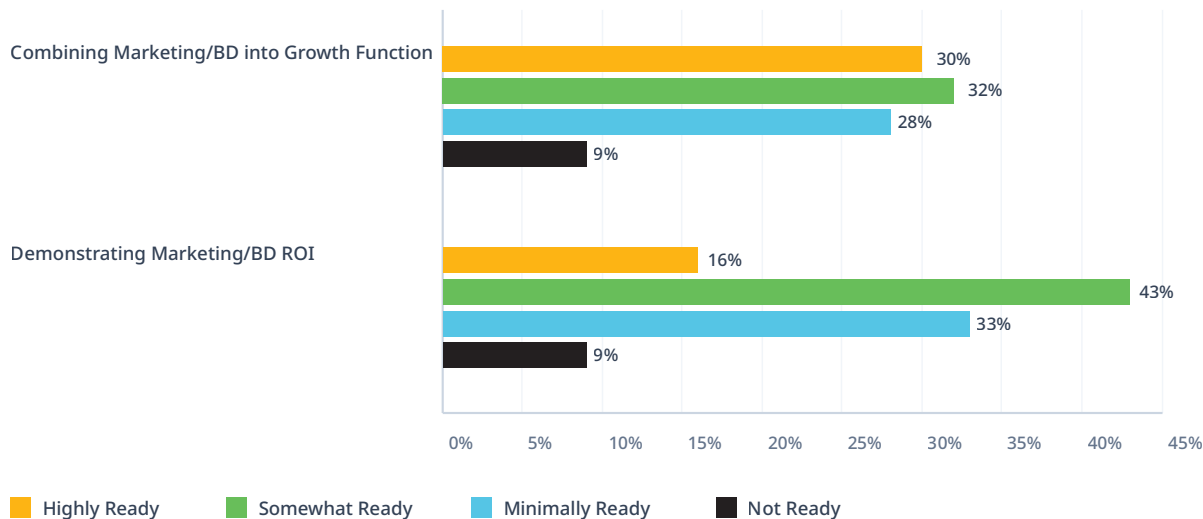
As marketing becomes more involved in lead generation, visibility, content strategy, and market intelligence, business development also increasingly uses marketing-enabled activities such as thought leadership, social media, webinars, and digital outreach. The lines between the functions are becoming less rigid. A growth team model can help firms coordinate pursuits, CX, account growth, visibility, and measurement under a more unified strategy.

Readiness remains mixed. Approximately 30 percent of survey participants say their firms are highly ready to combine these functions into a growth team, while another 32 percent say they are somewhat ready. More than one-third say their firms are minimally ready or not ready. This suggests that while the direction is visible, many firms still need to clarify structure, roles, systems, and leadership expectations before the model can be effective.

Additional Trends



Preparedness for Additional Trends



Demonstrating ROI

Another identified trend is a focus on return on investment (ROI) for marketing and business development teams. Forty-seven percent of survey participants identified demonstrating marketing and business development ROI as highly impactful in the coming years, while another 42 percent believe it will be somewhat impactful. Yet only 16 percent say their firms are highly ready to do this, and more than 40 percent say their marketing and BD teams are minimally ready or not ready at all.

For many AEC firms, marketing and business development measurement has historically focused on visible activity or familiar outcomes: proposal hit rates, website traffic, social media metrics, thought

leadership output, and net new logos. These metrics have value, but they do not always show the full cost, quality, or business impact of the work.

Demonstrating ROI requires firms to connect marketing and business development effort to revenue. That includes tracking win rate and pipeline by source, the fully loaded cost of pursuits, the opportunity cost of low-probability chases, repeat and expansion revenue from existing clients, and marketing-sourced versus marketing-influenced revenue. These measures do not always require a dedicated analytics team, but they do require reliable data, consistent definitions, and the discipline to track what matters.

PUTTING THE TRENDS TO WORK

The AEC industry is experiencing one of the highest levels of change in decades. Firms are expanding and focused on growth, yet workforce shortages already exist and are expected to worsen. Add to that the changing skillset required to succeed in marketing and business development, and the potential to fall behind becomes a serious risk.

That pressure is compounded by the rapid evolution of AI and related technologies. Firms are still determining the best uses for new tools while trying to keep pace with the changing capabilities of the tools they already have. The pace of change affects people, systems, workflows, buyer behavior, and the way firms demonstrate value.

Amid this demographic, talent, and technology change, two things remain constant. First, relationships still matter, and they work best in a human-to-human context. But those relationships now require stronger communication, sharper thinking, and better use of technology. Second, existing clients remain one of the strongest sources of future growth. But firms must become more intentional about CX, account growth, cross-selling, and making clients aware of the full breadth of services the firm can provide.

Firms that succeed in the future will not choose between human skills and technology enablement. They will understand the line between them and build the capacity to balance both.

Firm and Growth Leadership Insights

For firm leaders and growth leaders, the takeaway is that the firm's ability to win, keep, and grow work can no longer be left to run on its own. The trends in this report point to the need for deliberate investment, clearer accountability, and better alignment across talent, clients, technology, and measurement. Each trend carries a cost of inaction that may be easy to absorb in the short term, but expensive to reverse later.

Three priorities stand out for firm and growth leadership attention.

Talent. The skills that distinguish strong marketing and BD, including strategic and critical thinking, advanced communication, and data and AI fluency, are also among the skills firms are least ready to build. In a tightening labor market, firms cannot assume they can hire their way out of the gap. Structured training may be the lowest-cost, highest-leverage move available.

Existing clients. With CAC rising and significant future revenue opportunity sitting within current clients, formal CX and key-account efforts may return more than equivalent spending focused only

on net new logos. Firms need systems that help them listen to clients, identify unmet needs, expand relationships, and connect client insight to revenue growth.

Measurement. Until firms can connect marketing and BD activity to revenue, investment decisions are being made on faith. Firm and growth leaders need a clearer basis for deciding what to fund, what to improve, and what to stop doing. That requires metrics that connect growth activity to outcomes, including win rate, pursuit cost, pipeline source, repeat and expansion revenue, and marketing-sourced or marketing-influenced work.

The practical question for leadership is not whether to invest, but where to start and how to know whether the investment is working. One useful test is to ask what the firm would lose by doing nothing for the next two years, including effects on win rate, client retention, talent, visibility, and buyer discovery. Where the cost of inaction is high and current readiness is low, the case for investment becomes clearer.

Leadership Actions to Take

- **Drive critical and strategic thinking across the organization.** Develop training modules, share case studies, and create scenario-planning exercises for marketing, BD, seller-doers, and technical leaders. Make critical and strategic thinking part of the firm's growth culture, not only an individual skill.
- **Implement communication and power-skills training.** Include written and verbal communication, active listening, emotional intelligence, storytelling, adapting to different personality styles, asking better questions, and translating technical detail for clients and decision-makers. Make this training available across the firm, not only to marketing and BD staff.
- **Leverage AI and automation firmwide.** Identify areas where technology can enhance productivity, quality, and decision-making, as well as areas where more technology may not make sense. Develop use cases, create technology teams, and identify champions or power users who can support learning and adoption.
- **Invest in data infrastructure and knowledge management.** Centralize project data, resumes, graphics, case studies, and client intelligence. Establish data governance policies and AI data-readiness plans. Firms must be able to trust their data if they want to leverage AI and automation effectively. Consider digital asset management (DAM) and customer relationship management (CRM) tools as firmwide systems, not just marketing and BD tools.
- **Refocus marketing and BD toward existing clients.** Create key-account strategies for top clients. Define ideal clients, cross-selling goals, and wallet-share goals. Expand relationships beyond the project manager and one or two firm contacts. Go wide and deep with key clients by service line, geography, market, and relationship level. Include marketing and BD staff in that effort and incentivize the behaviors that support it.
- **Deploy a formal CX program if one does not exist.** Map client journeys across service lines, offices, or market sectors. Implement feedback loops through interviews, surveys, and regular client conversations. Use technology to support human interaction, not replace it. Embed marketing and BD staff into CX delivery so client insight can become actionable.
- **Elevate firm visibility.** Prepare for changing buyer behaviors by investing in content marketing, thought leadership, and GEO. Address specific client questions at different steps of the buyer journey. Determine where the firm has authority and demonstrate that expertise online and offline.
- **Prove marketing and BD value.** Move beyond tracking only revenue, bookings, and hit rates. Tie project wins, repeat work, new work, and client growth to specific marketing and BD activities, campaigns, relationships, and pursuits. Define the metrics that matter most to the firm and ensure that the systems and processes to track those metrics are in place.
- **Pilot a growth team.** Integrate marketing, BD, and CX functions for a pilot project, office, market sector, or client segment. Use the pilot to reduce silos, improve accountability, and define key performance indicators (KPIs) for growth team success. Expand the model as results become visible.

Marketing, Business Development, and Growth Teams Insights

For marketing, business development, and growth teams, the takeaway is more immediate: focus day to day on the capabilities and activities that will matter most as the work becomes more strategic, more technology-enabled, and more measurable.

Two things are true across marketing and BD roles. Power skills, especially strategic thinking, critical thinking, and advanced communication, matter more than ever. At the same time, practical fluency with AI, data, automation, CRM, analytics, and digital visibility tools is becoming baseline expectation. The strongest professionals will build both.

For marketers, the leverage is visibility and proof. As buyers begin more of their research through AI tools, conversational search, and digital self-education, the content a firm publishes and the expertise it makes discoverable increasingly determine whether the firm is considered at all. Marketers should invest in thought leadership, education-based content, and GEO rather than activity for its own sake. At the same time, marketers need to become better at connecting their work to revenue through metrics such as win rate and pipeline by source, marketing-sourced work, marketing-influenced work, and other measures that demonstrate value.

For business developers, the leverage is relationships and existing clients. Much of a firm's future revenue may sit with the clients it already serves, while much BD energy still goes toward new logos. Business developers should redirect time toward CX, account growth, cross-selling, and relationship depth with current clients. That means building relationships beyond the project manager, understanding where additional services may be relevant, and positioning early for the work that matters most. The strongest pursuits are often shaped months or years before the RFP is released.

For both roles, the throughline is the same: pair human judgment with fluency in new tools, deepen the relationships and visibility only people can build, and learn to show value in numbers. Progress does not require waiting for perfect firmwide systems. Teams can start where the firm is least ready and where the opportunity for improvement is highest.

Marketing, Business Development, and Growth Team Actions to Take

- **Build AI fluency now.** Do not wait for a firmwide program to begin. Choose one or two tools, such as a general assistant and another tool that fits your daily workflow, and use them on real work: proposal drafts, research, content, qualifications, client planning, and internal analysis. Track what works and bring that learning back to the team.
- **Sharpen strategic and critical thinking.** Treat every pursuit as a thinking exercise, not just a production task. Ask why the client is really buying, what they value most, where the firm genuinely wins, and what would make the pursuit more competitive. Bring that perspective into go/no-go, positioning, and win-strategy conversations.
- **Strengthen communication and power skills.** Invest in active listening, storytelling, emotional intelligence, question development, and communication across personality styles. Translate technical detail into language clients, selection committees, and pursuit teams can understand and use.
- **Marketers: make the firm discoverable to AI.** Publish education-based thought leadership that answers the questions clients actually ask. Structure content for GEO so AI tools and conversational search are more likely to surface the firm's expertise. Prioritize content that demonstrates authority over activity that simply fills channels.
- **Marketers: connect work to revenue.** Begin tracking win rate and pipeline by source, marketing-sourced work, and marketing-influenced work. Bring numbers into leadership conversations rather than only activity counts. Become the person who can show marketing's contribution to growth, not just describe it.
- **Business developers: go deep with existing clients.** Audit where your time actually goes, then redirect more energy toward account growth, cross-selling, and CX with the clients the firm already serves. Map relationships inside key accounts and widen them beyond the project manager.
- **Business developers: position early, before the RFP.** Identify important pursuits 6 to 18 months out and begin building relationships now. The most winnable work is often shaped long before the RFP is released. Invest in being known, trusted, and relevant before the formal need appears.

- **Growth teams: align the system around shared priorities.** Work across marketing, BD, seller-doers, CX, and technical leadership to define where growth should come from, how it will be measured, and what information needs to be shared. Use client insight, data, visibility, and pursuit intelligence together rather than treating them as separate workstreams.

PROJECTED YEAR-END 2026 PERFORMANCE

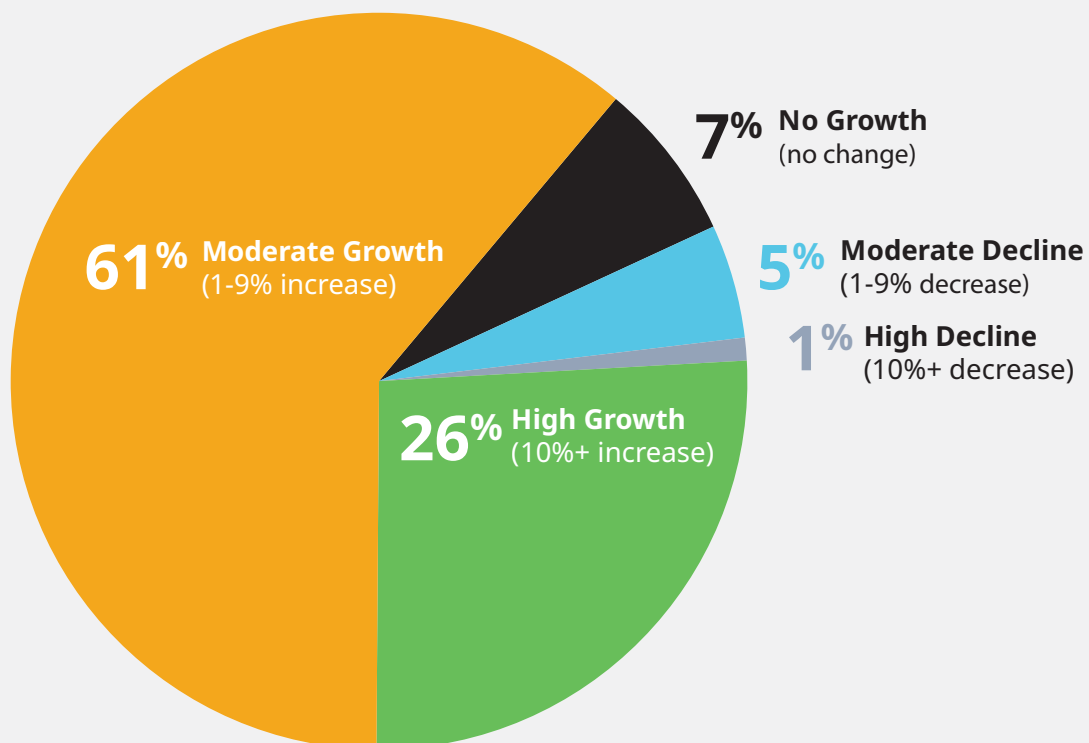
Although the primary focus of this research initiative was to understand the emerging trends in marketing and BD, there is also value in reviewing firms' annual performance and forecasted profits for 2026.

The responses depict a continued positive trend for the AEC industry. Sixty-one percent of firms anticipate moderate year-over-year profit growth of one percent to nine percent when compared with 2025, which was the largest response category by far. Another 26 percent of firms expect even stronger performance, with anticipated year-over-year profit growth of 10 percent or more.

This leaves roughly 13 percent of firms anticipating no growth or some level of decline in profits compared with the prior year.

This optimism is worth weighing against the broader construction outlook (as of June 2026 when this report was written). The American Institute of Architects (AIA) Consensus Construction Forecast, published in January 2026, projects only a 1.0 percent increase in overall nonresidential building spending for 2026, rising to 2.2 percent in 2027, a more cautious picture than respondents' own expectations. Other forecasting sources have more favorable outlooks but all forecasting a slower market. Regardless, the gap is instructive: marketing and BD leaders are planning for growth even as broader construction forecasts point to slower growth, which raises the stakes for the efficiency, client-retention, and positioning strategies discussed throughout this report.

Projected 2026 Profit Change vs. 2025



METRICS THAT MATTER

The final survey question asked which metrics firms use to gauge marketing and BD success and how respondents believe their firms perform compared with their peers.

The most commonly tracked metrics are repeat client revenues, proposal hit rate (number of proposal wins compared with the number of proposals submitted), website and social media traffic, thought leadership output, and attraction of new ideal clients (net new logos).

Tracking these metrics is only the first step. The more important question is whether firms are using them to understand performance, compare against peers, and make better decisions.

Self-Assessment of Performance

Metric	Far Below Average	Below Average	Average	Above Average	Far Above Average
Repeat Client Revenues	0.95%	0.95%	23.81%	48.56%	25.71%
Proposal Hit Rate (# won vs. # submitted)	0.00%	15.89%	32.71%	34.58%	8.41%
Website & Social Media Traffic	1.89%	16.04%	39.62%	24.53%	6.60%
Thought Leadership Output	4.72%	24.53%	28.30%	19.81%	6.60%
Ability to Attract New, Ideal Clients	0.95%	14.29%	40.00%	22.86%	5.71%
Proposals Submitted	5.83%	7.77%	33.98%	29.13%	6.80%
Revenue Growth	0.00%	7.62%	28.57%	33.33%	12.38%
Pipeline Value	0.95%	9.52%	35.24%	23.81%	12.38%
Profitability	0.00%	6.67%	32.38%	29.52%	12.38%
Proposal Conversion Rate (\$ won vs. \$ submitted)	2.83%	14.15%	32.08%	24.53%	5.66%
Client/Prospect Meetings & Touchpoints	3.85%	15.38%	32.69%	17.31%	7.69%
Weighted Pipeline Value	0.95%	10.48%	37.14%	22.86%	4.76%
Referrals Received	0.95%	9.52%	25.71%	26.67%	12.38%
Cross-Selling / Account Growth	1.94%	17.48%	27.18%	18.45%	5.83%
Client Satisfaction Score	1.92%	4.81%	13.46%	31.73%	15.38%
Net Promoter Score	1.96%	4.90%	14.71%	20.59%	8.82%

Survey participants tended to rate their own firms as average and above average across the identified metric categories. Across the sixteen defined categories, the most common self-assessment was average for ten categories, while above average was the most common response for the remaining six. Most survey participants declined to rate their firms as far below average in most metrics.

A few metrics stood out. For repeat client revenues, almost 26 percent of firms rated themselves as far above average. Conversely, for thought leadership output, even though it was the fourth most commonly tracked metric, just under a quarter of respondents rated their firms below average. For client satisfaction score, more than 15 percent of participants assessed their firms as far above average.

Segment-level KPI patterns should be read as directional rather than definitive, but they add useful context. Across several segments, firms tended to rate themselves strongest in repeat client revenues, revenue growth, profitability, referrals, or client satisfaction. Areas rated below average varied by segment,

but commonly included thought leadership output, proposal performance, client/prospect meetings and touchpoints, website and social media performance, and cross-selling or account growth. These patterns reinforce the broader finding that many firms feel confident in relationship-based outcomes, while opportunities remain in visibility, measurement, pursuit performance, and intentional account growth.

Self-assessment has limits. Few firms place themselves below average, so these ratings reveal perception more than proven performance. Pairing self-assessment with external benchmarks sharpens the picture. The *2026 Deltek Clarity Architecture & Engineering Industry Study*¹⁴, for example, puts the industry median competitive win rate at 49 percent, down one point from 2025, and reports that operating profit on net revenue recently moderated to the mid-teens after reaching a ten-year high.

Read together, the two views allow a firm to test self-perception against industry reality. A team that rates its proposal hit rate as above average can ask whether it is genuinely clearing the 49 percent benchmark, or only feels that it is. The value of metrics is not in tracking more activity. It is in using the right measures to understand performance, demonstrate value, and decide where to focus next.

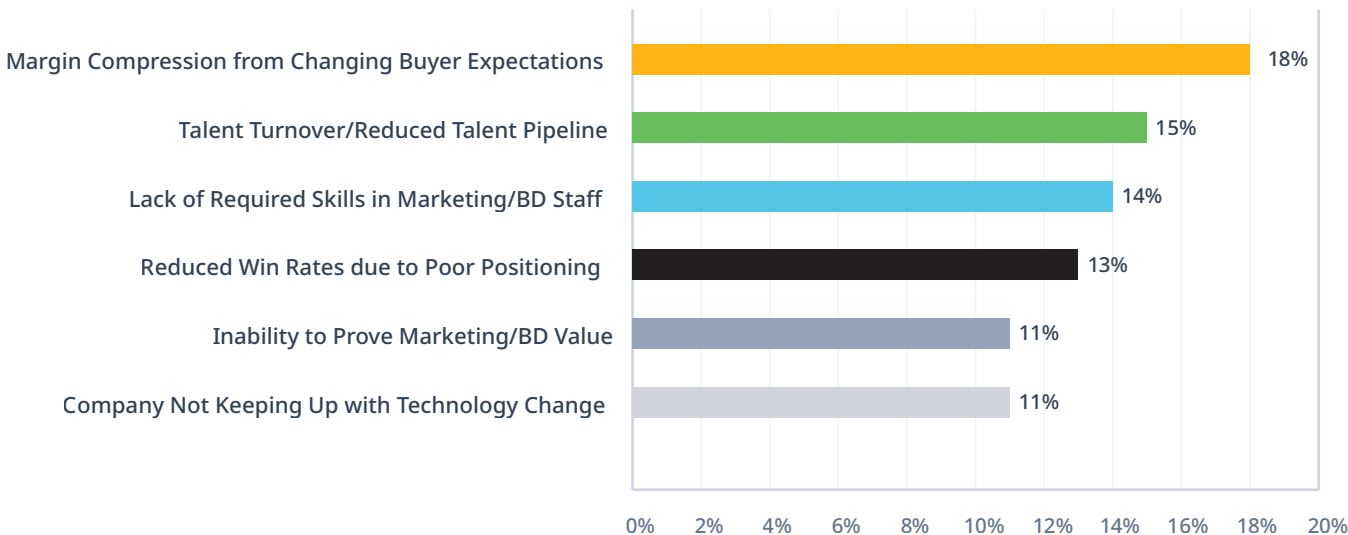


MARKETING AND BUSINESS DEVELOPMENT RISKS

In addition to understanding the emerging trends, we also sought to get a feel for the greatest risks to the marketing and business development functions in AEC firms.

Survey participants were asked to select the single greatest risk to the future of marketing/BD, with an option to identify a risk not listed.

Greatest Risks to Marketing & Business Development



Margin compression from changing buyer expectations (technology enablement) was the top identified risk, with 18 percent of respondents selecting this option. Technology is not only disrupting the way AEC firms go to market, but also the anticipated experience that clients are having with our firms.

Media has continually perpetuated the story that with artificial intelligence, everything will be faster, cheaper, and better. There is a concern, and anecdotal evidence, that some buyers of AEC services believe the hype and already expect these outcomes with a corresponding fee or cost reduction from AEC firms. Outside of marketing teams, AI is still in its infancy in adoption, and almost one-third of companies in the industry have yet to utilize artificial intelligence in any meaningful way. Furthermore, the discussion of value pricing over the traditional hourly-based pricing model is taking root. How can companies leverage new AI and automation tools but not just return every bit of savings to the client?

Talent turnover or reduced talent pipeline was the second-highest risk identified by the research, with 15% of survey respondents selecting this option. This parallels the broader AEC industry, where a lack of available talent regularly scores highly in industry research, including the 2026 Annual AEC Industry Outlook¹⁸ conducted by Stambaugh Ness. When considering the long-term trend of declining birth rates in the western world, which has now created an enrollment cliff for colleges and universities, the concerns of a dwindling talent pipeline are well-founded. Current forecasts indicate that the number of high school graduates will decline by 13% by the year 2041¹⁹, so this downward trend will not turn around anytime in the near future.

Echoing the emerging trend findings, 14 percent of participants believe that the lack of required skills in marketing and business development staff will be the greatest risk in the coming years. Newer technologies require new skillsets, which many professionals don't currently possess. Furthermore, as evidenced in our top trend, the

need for strategic and critical thinking skills as well as advanced communication skills will be critical to future success. Recent and future additions to the AEC workforce are digital natives and often don't come equipped with these skills. Firms not providing training to elevate these skills will fall further behind the competition.

Declining win rates due to poor positioning was ranked the fourth greatest risk by survey participants, at 13 percent. As the buyer journey continues to evolve and increasingly relies on third-party prequalification as well as use of artificial intelligence and large language models to identify potential AEC partners, firms that are not leveraging thought leadership and providing education-based content will fall further behind. As Search Engine Optimization (SEO) evolves to Generative Engine Optimization (GEO), AEC firms must adapt their marketing efforts to be AI-friendly. This requires that companies become authorities in highly focused areas, conducting research, publishing content, and answering the most common questions. Unfortunately, only 19 percent of firms are highly ready to do this. An additional 7 percent of participants specifically identified lower visibility in AI-based buyer journeys as the greatest risk.

Corresponding with one of the emerging trends around ROI, 11 percent of participants feel that the inability to prove marketing/business development value will be the greatest risk. This will become particularly relevant as AEC firms reach the point where they consider whether some of their marketing and business development functions can just be replaced by artificial intelligence. This idea isn't far-fetched. As reported by the *Wall Street Journal* in August 2025²⁰, business consulting firm McKinsey "rolled out roughly 12,000 AI agents" to do the work previously performed by junior consultants. At the same time, they've reduced their headcount by about 5,000 people. As the CMO for an engineering firm shared, "I have 12 proposal coordinators that will be AI'd out of a job within three years, and they don't even realize it's coming." Marketing and business development functions must think in terms of Return on Investment and continually prove their value to firm leadership –

which also requires defined processes, effective tools, and a knowledge of relevant metrics and key performance indicators.

Trying to keep up with technological changes tied with the inability to prove marketing and business development value, with 11% of survey respondents selecting this option. This is a continual struggle across the AEC market space. As technology advances at a rapid pace, new tools seem to become available daily. For years, companies and professionals have been challenged to even fully utilize the technology tools they already have in place. For instance, before all the talk of AI, generative design first became available in Revit 2020, yet few firms are currently employing it – even as newer generative design tools have come online. Within marketing and business development, a host of new AEC-focused software tools have come to market, with myriad industry-agnostic tools also being released.

Declining client loyalty ranked at the bottom of the greatest risks question, with only 5 percent of participants identifying this as the greatest risk. The "other" risk category accounted for 7 percent of responses and included such items as the lack of a long-term mindset to build relationships, AI slop becoming the norm, AI taking jobs from humans, and the inability to integrate marketing and BD functions, resulting in old-school thinking.

SEGMENT LENS: PATTERNS WORTH WATCHING

The overall findings were consistent across many firm types, sizes, and growth categories. Strategic and critical thinking, along with advanced communication skills, rose to the top across many segments, reinforcing the importance of the changing talent stack.

A few segment-level differences are worth noting.

Architecture-engineering firms placed expertise-led visibility highest, while firms with 250 to 499 employees elevated AI-enabled workflows and improved data management and infrastructure. High-growth firms tied growth through existing clients with strategic and critical thinking and communication skills, reinforcing the connection between talent, client development, and growth strategy.

Segment-level findings should be interpreted directionally. Some categories had smaller sample sizes, and most respondents represented firms projecting moderate or high growth. Even so, the segment patterns point to a consistent message: firms may experience the trends differently, but the same core pressures around talent, clients, technology, risk, and measurement show up across the market.

SEGMENT-SPECIFIC INFORMATION

Type of Firm

Architecture-Engineering Firms

Most Impactful = Expertise-Led Visibility

Greatest Risk = (TIE) Lack of Required Marketing/BD Skills & Company Not Keeping Up with Technology Change

Projected Profits = High Growth

KPI Far Above Average = Revenue Growth

KPI Below Average = Client/Prospect Meetings & Touchpoints

Architecture Firms

Most Impactful = Critical & Strategic Thinking; Communication Skills

Greatest Risk = (TIE) Reduced Win Rates due to Poor Positioning & Lack of Required Skills in Marketing & BD

Projected Profits = Moderate Growth (BUT 33% anticipating decline)

KPI Far Above Average = Client Satisfaction Score

KPI Below Average = Proposal Hit Rate

Construction Firms

Most Impactful = Critical & Strategic Thinking; Communication Skills

Greatest Risk = Company Not Keeping up with Tech Change

Projected Profits = Moderate Growth

KPI Far Above Average = Repeat Client Revenues

KPI Below Average = Cross-Selling / Account Growth

Engineering-Environmental Firms

Most Impactful = Critical & Strategic Thinking; Communication Skills

Greatest Risk = (TIE) Margin Compression due to Changing Buyer Expectations; Talent Turnover/ Reduced Talent Pipeline

Projected Profits = Moderate Growth

KPI Far Above Average = Repeat Client Revenues

KPI Below Average = Thought Leadership Output

Specialty Consultants / Other Firms

Most Impactful = Critical & Strategic Thinking; Communication Skills

Greatest Risk = Inability to Prove Marketing/BD Value

Projected Profits = Moderate Growth

KPI Far Above Average = Referrals Received

KPI Below Average = Website & Social Media

Firm Size

1-19 Employees

Most Impactful = Critical & Strategic Thinking; Communication Skills

Greatest Risk = Reduced Win Rates due to Poor Positioning

Projected Profits = Moderate Growth

KPI Far Above Average = Client Satisfaction Score

KPI Below Average = (TIE) Thought Leadership Output / Website & Social Media

20-49 Employees

Most Impactful = Critical & Strategic Thinking; Communication Skills

Greatest Risk = Talent Turnover or Reduced Talent Pipeline

Projected Profits = Moderate Growth

KPI Far Above Average = Repeat Client Revenues

KPI Below Average = Thought Leadership Output

50-99 Employees

Most Impactful = Critical & Strategic Thinking; Communication Skills

Greatest Risk = (TIE) Lack of Required Skills in Marketing/BD Staff & Margin Compression due to Changing Buyer Expectations

Projected Profits = Moderate Growth (BUT 25% expect decline)

KPI Far Above Average = Repeat Client Revenues

KPI Below Average = Thought Leadership Output

100-249 Employees

Most Impactful = Critical & Strategic Thinking; Communication Skills

Greatest Risk = (TIE) Margin Compression due to Changing Buyer Expectations & Company Not Keeping Up with Tech

Projected Profits = Moderate Growth (BUT 23% expect decline)

KPI Far Above Average = Repeat Client Revenues;

KPI Below Average = Proposal Conversion Rate (\$)

250-499 Employees

Most Impactful = (TIE) AI-Enabled Workflows/ Automation & Improved Data Management and Infrastructure

Greatest Risk = Margin Compression due to Changing Buyer Expectations

Projected Profits = Moderate Growth

KPI Far Above Average = Repeat Client Revenues

KPI Below Average = Client/Prospect Meetings/ Touchpoints

500+ Employees

Most Impactful = Critical & Strategic Thinking;
Communication Skills

Greatest Risk = Lack of Required Skills in Marketing/BD
Staff

Projected Profits = Moderate Growth (BUT 43% High
Growth)

KPI Far Above Average = (TIE) Revenue Growth &
Profitability & Repeat Client Revenues

KPI Below Average = Thought Leadership Output

Performance-based Segments

High Decline Firms

Sample Size too Small

Moderate Decline Firms

Sample Size too Small

No Growth Firms (Small Sample Size)

Most Impactful = Client Experience as Differentiator

Greatest Risk = Talent Turnover/Reduced Talent
Pipeline

Projected Profits = No Change

KPI Far Above Average = Client/Prospect Meetings/
Touchpoints

KPI Below Average = Tie among many

Moderate Growth Firms (Largest Sample Size)

Most Impactful = Critical & Strategic Thinking
Communication Skills

Greatest Risk = Margin Compression due to Changing
Buyer Expectations

Projected Profits = Moderate Growth

KPI Far Above Average = TIE Revenue Growth &
Profitability

KPI Below Average = Thought Leadership Output

High Growth Firms

Most Impactful = (TIE) Growth via Existing Clients &
Strategic and Critical Thinking; Communication Skills

Greatest Risk = (TIE) Lack of Required Marketing/
BD Skills & Talent Turnover/Reduced Talent Pipeline

Projected Profits = High Growth

KPI Far Above Average = (TIE) Revenue Growth & Profits

KPI Below Average = Thought Leadership Output

TERMS DICTIONARY

The following terms are used throughout this report. Definitions are provided to support a shared understanding among firm leaders, marketing and business development professionals, and growth teams.

Account growth

Increasing revenue, services, geographies, or relationship depth within an existing client account.

Account-based marketing

A focused marketing and business development approach that targets specific high-value clients or prospects with tailored outreach, content, and relationship-building activities.

Power skills

Skills that help professionals think, communicate, and respond effectively in changing conditions. In this report, power skills include strategic thinking, critical thinking, listening, written communication, verbal communication, judgment, and the ability to apply tools thoughtfully.

Artificial intelligence (AI)

Technology that can perform tasks that typically require human intelligence, such as summarizing information, drafting content, identifying patterns, analyzing data, or supporting decision-making.

AI-enabled workflows

Work processes that use AI to improve efficiency, quality, insight, or consistency. Examples may include proposal support, research, content development, CRM updates, knowledge management, and performance analysis.

AI fluency

The ability to use AI tools effectively, evaluate AI-generated output, understand appropriate use cases, and apply human judgment to AI-supported work.

Automation

The use of technology to complete repetitive or rules-based tasks with less manual effort. In marketing and business development, automation may support email campaigns, CRM updates, reporting, proposal content, or workflow steps.

Buyer journey

The process a client or prospective client follows as they identify needs, research options, evaluate firms, shortlist providers, and make selection decisions.

Client experience (CX)

The overall experience a client has with a firm across the relationship, from early awareness and pursuit activity through project delivery, feedback, and future work. In this report, CX is treated as a system for understanding client needs, strengthening relationships, and supporting growth.

Client relationship depth

The strength and breadth of a firm's relationships within a client organization. Deeper relationships often include multiple contacts, multiple levels of connection, and relationships beyond a single project manager or decision-maker.

Cross-selling

Introducing an existing client to additional services, practice areas, geographies, or capabilities that may meet their needs.

Customer acquisition cost (CAC)

The cost of winning a new client. This may include marketing, business development, pursuit, proposal, and related staff time or expenses.

Customer relationship management (CRM)

A system or process for managing information about clients, prospects, relationships, opportunities, and business development activity.

Data governance

The policies, standards, and practices that determine how data is collected, maintained, protected, shared, and used.

Data infrastructure

The systems, tools, workflows, and practices that allow a firm to collect, organize, access, manage, and use data effectively.

Data literacy

The ability to understand, interpret, question, and use data to support decisions.

Digital asset management (DAM)

A system for storing, organizing, finding, and managing digital assets such as project photos, resumes, case studies, graphics, logos, and other marketing materials.

Expansion revenue

Revenue growth from existing clients, including additional projects, expanded scopes, new services, new geographies, or increased account penetration.

Expertise-led visibility

Visibility created by demonstrating knowledge, insight, and authority. Examples include thought leadership, articles, blogs, webinars, research, speaking, educational content, and searchable digital resources.

Generative Engine Optimization (GEO)

The practice of structuring and publishing content so that AI-powered search tools and answer engines are more likely to find, understand, and surface a firm's expertise.

Go/no-go decision

A decision-making process used to determine whether a firm should pursue a specific opportunity.

Growth department

A more integrated structure that brings marketing, business development, and sometimes CX or related growth functions into closer alignment.

Growth team

The group of people responsible for supporting firm growth. Depending on the firm, this may include marketing, business development, seller-doers, CX leaders, technical leaders, and operations or technology support.

Key account

A client account that is especially important to the firm because of revenue, strategic fit, growth potential, relationship strength, market influence, or long-term opportunity.

Large language model (LLM)

An AI model trained on large amounts of text that can generate, summarize, interpret, and respond to written language. Examples include tools used for conversational search, content drafting, and research support.

Marketing-influenced revenue

Revenue connected to opportunities where marketing activities helped support awareness, positioning, relationship development, pursuit strategy, or client decision-making, even if marketing was not the original source of the opportunity.

Marketing-sourced revenue

Revenue connected to opportunities that originated from a marketing activity, campaign, content effort, event, referral pathway, website inquiry, or other marketing-led source.

Net new logos

New client accounts that have not previously worked with the firm. This term is often used to describe growth through new client acquisition.

Pipeline by source

A way of tracking opportunities based on how they entered the firm's pipeline, such as referral, existing client, marketing campaign, business development outreach, website inquiry, or repeat work.

Positioning

The process of shaping how a client or prospect understands a firm's value, expertise, differentiation, and fit for a specific opportunity or market.

Prepositioning

Relationship-building, intelligence-gathering, and strategic communication that happen before a formal procurement or RFP is released.

Proposal hit rate

The number of wins compared with the number of proposals submitted.

Readiness gap

The difference between how important a trend or capability is expected to be and how prepared firms believe they are to respond.

Repeat client revenue

Revenue from clients that have previously worked with the firm.

Return on investment (ROI)

A way of evaluating whether the value created by an activity, function, campaign, pursuit, or investment is greater than the cost required to produce it.

Seller-doer

A technical professional who both delivers project work and participates in business development, client relationship-building, or pursuit activity.

Strategic thinking

The ability to understand the broader context, identify patterns, anticipate consequences, weigh trade-offs, and make decisions that support long-term goals.

Critical thinking

The ability to question assumptions, evaluate evidence, identify gaps or risks, and determine whether information and conclusions are sound.

Technology fluency

The ability to understand and use technology tools in ways that improve work, support better decisions, and create business value. In this report, technology fluency includes AI, data, automation, CRM, analytics, digital visibility, and related systems.

Thought leadership

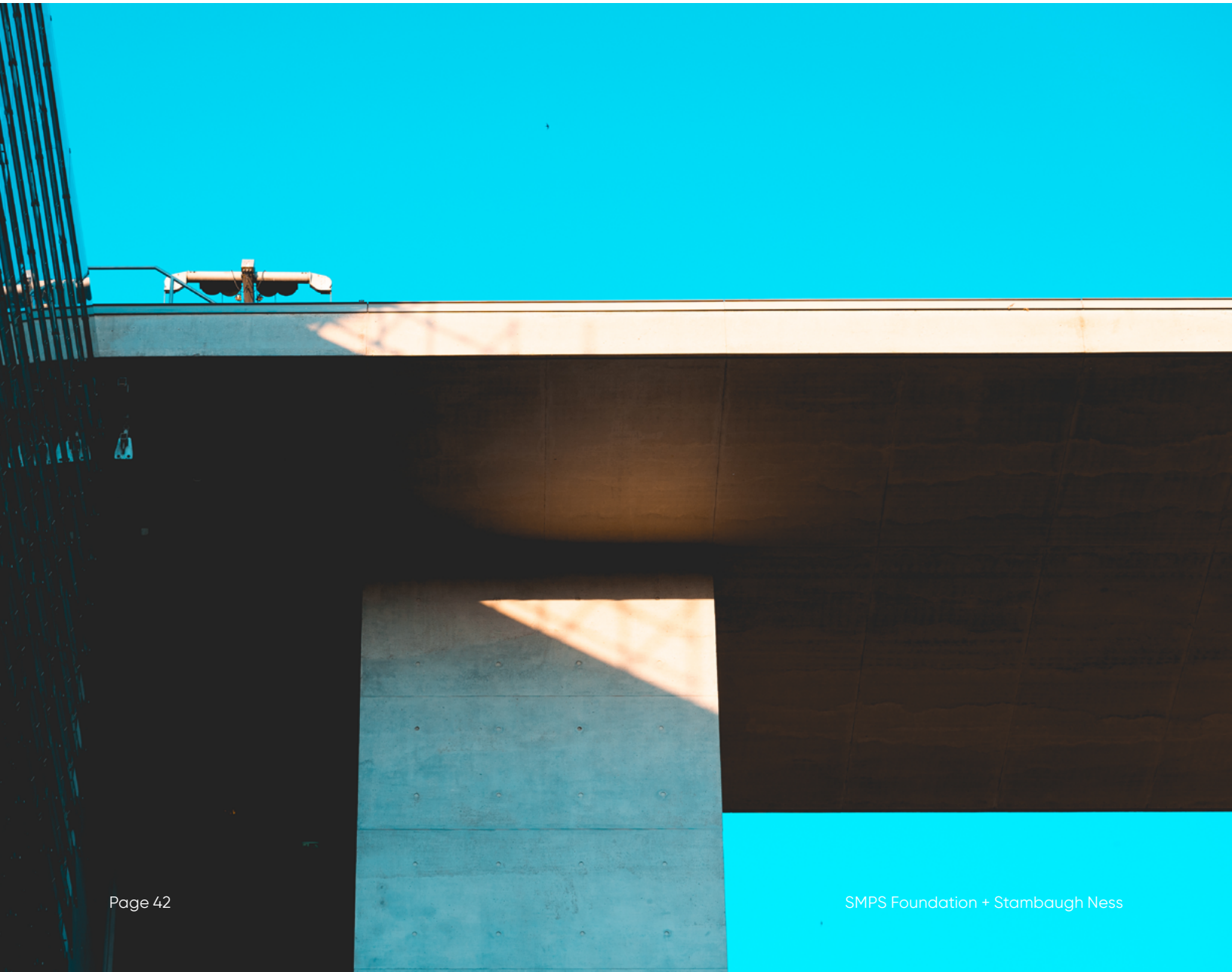
Content or communication that demonstrates a firm's expertise, point of view, and understanding of client challenges. Examples include articles, blogs, white papers, webinars, research, presentations, and educational resources.

Voice of client

A structured approach to gathering client feedback through interviews, surveys, conversations, or other listening methods.

Wallet share

The portion of a client's total spending in a service area, market, or geography that is captured by a firm.



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About the Research

The SMPS Foundation's *2027 Emerging Trends in AEC Marketing and Business Development* research is designed to help firm leaders, marketers, business developers, and growth teams understand the issues most likely to shape the future of the profession. The annual research effort provides a forward-looking view of market forces, client expectations, talent needs, technology shifts, and firm readiness.

Purpose and History

In 2025, the SMPS Foundation, in collaboration with FMI Consulting, set out to better understand the emerging trends shaping marketing and BD in the built environment. The resulting report, *2026 Emerging Trends in A/E/C Marketing and Business Development*¹, identified three overarching trends:

- Collaboration is the New Currency: Why Clients Expect More Than Services
- The Momentum of Client Experience (CX): A Strategic Imperative for AEC Firms
- The Maturation of Marketing and Business Development in AEC

Concurrently, the SMPS Foundation collaborated with ClientSavvy, a ClearlyRated Company, to produce a separate research-driven report, *Client Experience in the A/E/C Industry: Benchmarks, Insights, and Trends*².

Together, these reports helped set the foundation for the 2027 emerging trends research. Several themes from the prior research carried forward, including CX, collaboration, and the maturation of marketing and business development. The 2027 research reinforced those findings while adding greater emphasis on talent, technology, data, AI, current-client revenue growth, visibility, and measurement.

About the 2027 Research

Research for this report began in early 2026 with a comprehensive review of secondary sources. The team examined research reports, industry publications, and thought leadership from architecture, engineering, and construction organizations, consultants, professional services firms, and marketing and business development experts across multiple industries. The overall research period spanned January through May 2026.

The secondary research created a high-level understanding of the major trends affecting the marketing and BD functions. Those findings were

then used to focus the primary qualitative research phase. More than 65 AEC firm leaders participated in trend discussions through one-on-one interviews or small focus groups. A subsegment of this group included leaders from other professional services organizations, specifically the Legal Marketing Association and Association for Accounting Marketing, to understand the marketing and BD trends impacting adjacent industries.

Based upon the findings from the secondary and qualitative research phases, an online survey was conducted to help prioritize the emerging trends likely to be most impactful. The survey was fielded in April and May 2026. Readiness and performance figures throughout this report are self-reported and should be interpreted as respondent perceptions, not independently verified performance measures.

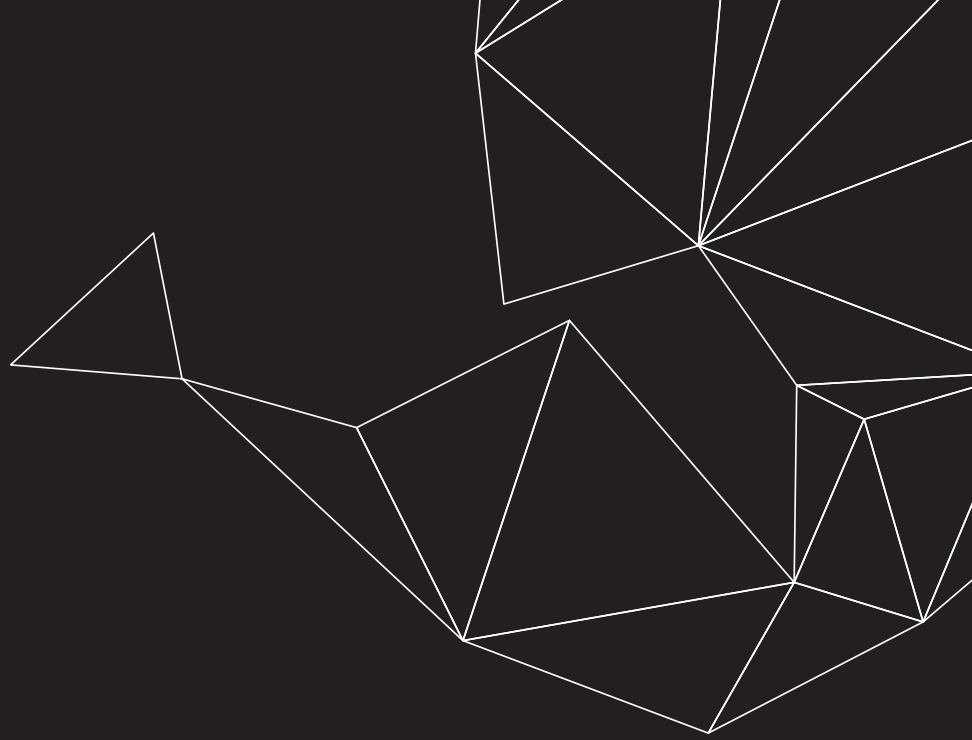
Use of AI in This Report

This report was researched, written, reviewed, and edited by human contributors. AI was used in limited supporting roles during the research and editorial process.

During the research phase, the research team used AI to help identify possible secondary research sources and to assist in identifying themes from interview and focus group notes. In both cases, AI outputs were reviewed and verified by people before being used to inform the research direction.

After the drafting of the report, the SMPS Foundation and editorial contributors used AI-assisted tools to support refinement, including organizing feedback, considering alternative wording, improving clarity, and strengthening consistency.

AI was not used as a replacement for human authorship, source review, interpretation, or final editorial decision-making. The SMPS Foundation retains responsibility for the content, structure, conclusions, and final language of the report.



EMERGING TRENDS

in AEC Marketing and Business Development

2027

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