



Win Projects

# CRM and the Business of **Winning Work**

How A/E Firms Build a System for Predictable  
Growth and Profitability

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# Introduction: The Gap Between Relationships & Revenue

Growth in architecture and engineering has always been grounded in relationships. Work begins with trust, and trust is built slowly through conversations, shared experience, and consistent delivery. For decades, this model has served firms well. Strong relationships create a steady flow of opportunities, and those opportunities translate into revenue through the efforts of experienced principals, project managers, and technical leaders.

That foundation still matters. What has changed is everything surrounding it.

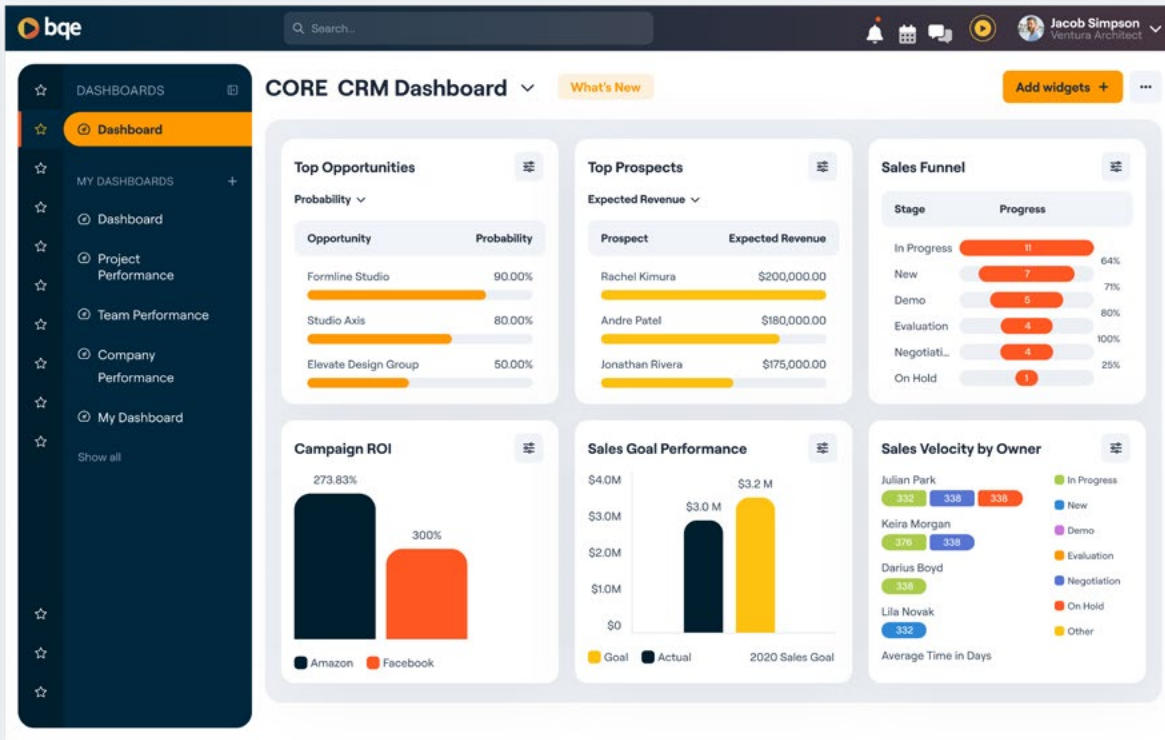
Firms today operate in an environment defined by tighter margins, rising client expectations, and an increasing volume of pursuits. The effort required to win work has expanded. Proposals are more complex. Timelines are shorter. Internal teams are balancing delivery responsibilities with business development in ways that stretch both time and attention. The pressure is not coming from a lack of opportunity, but from the growing difficulty of navigating it effectively.

This is where many firms begin to feel a disconnect. Activity remains high, and relationships continue to generate opportunities. Yet growth can feel uneven, difficult to forecast, and at times unpredictable. Wins come in clusters. Pipeline visibility is hazy. Staffing decisions are often made in response to what just happened rather than what is coming next. And worse, as firms scale, relationships aren't easily passed to new people in BD roles.

The underlying issue is subtle but persistent. Relationships generate opportunity, but the path from opportunity to revenue is often fragmented. And often the relationships are tied to specific people.

**Relationships are what create opportunity in this industry, but without structure, those opportunities are difficult to scale. When firms rely on individual memory or disconnected tools, visibility breaks down and performance becomes inconsistent. The firms that grow with intention build systems that make relationships actionable across the entire organization.**

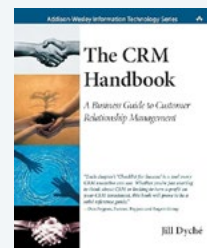
— Dan McCormick, CRO at BQE Software



Industry data makes this visible. In a recent A/E benchmarking study, the median competitive win rate sits at around 50 percent, while top-performing firms achieve 65.5 percent and lower-performing firms fall to 34.4 percent. Capture rates show a similar spread. These are meaningful gaps as pursuing work is a significant investment. They reflect differences in how firms evaluate opportunities, coordinate pursuits, and follow through on the work required to win.

Inside many firms, the mechanics behind those outcomes are distributed across people and tools rather than connected through a shared system. Client knowledge lives in individual inboxes and personal networks. Opportunities are tracked in spreadsheets that require constant manual maintenance. Proposal efforts rely on coordination across teams that may not share the same visibility into priorities, fee structures, or timelines. Follow-ups depend on individual memory and discipline, which varies across roles and workloads.

Over time, these conditions introduce friction. Opportunities can stall without clear ownership. Effort is duplicated when information is not centralized. Decisions are made with partial context. Leadership sees pieces of the pipeline, but not always the full picture.



**The CRM Handbook**  
by Mary O'Brien and Jill Dyché

A framework for translating strategy into measurable execution through disciplined systems and aligned goals.

# Why Growth Feels Unpredictable

A lack of demand is not the cause of unpredictability. Backlogs can be strong. Opportunities continue to surface. Relationships remain active. On the surface, the business appears healthy. Yet beneath that activity, there is often a persistent sense that growth is harder to control than it should be.

Leadership teams feel it in subtle ways. Proposals sit open for longer than anticipated. It's tough to predict when projects will start. Forecasts require frequent revision. Staffing decisions are made with limited visibility into what is actually going to convert. You feel the peaks and valleys of being too busy or not busy enough. The swings are rarely extreme, but they are consistent enough to erode confidence in the system.

This pattern is the result of how work moves through the firm.

In architecture and engineering, growth depends on a sequence of decisions and handoffs that span multiple roles. Marketing identifies opportunities and shapes positioning. Principals and technical leaders build relationships and influence pursuit strategy. Project managers evaluate scope and risk. Finance considers pricing, contract terms, and overall viability. Each step carries weight, and each step relies on information that is often incomplete or fragmented.

When these handoffs are not aligned, variability begins to enter the system.

One of the clearest signals appears in the volume and flow of proposals. In one A/E marketing benchmark, the average large firm submitted 332 proposals in a year, was shortlisted for 22 percent of those opportunities, and ultimately won 41 percent of the shortlisted pursuits. These numbers highlight the scale of effort required to compete. They also point to how much depends on consistent execution across qualification, positioning, and follow-through. The goal should be to submit fewer proposals to the opportunities you have a higher likelihood of winning. You need tracking data to make this happen.

**Unpredictable growth comes from from gaps in how information is shared, how decisions are made, and how teams coordinate across the pursuit process. When visibility improves and next steps are clearly defined, momentum becomes easier to manage and outcomes become more consistent.**

— Austin Miller, CMO at BQE Software

Even small inconsistencies at the front end can ripple through the entire pipeline.

A pursuit that is accepted without clear qualification can consume time and resources without a realistic path to success. A strong opportunity that lacks coordinated follow-up can stall at a critical moment. A proposal that is assembled under pressure, without access to the right information, can fall short despite the firm's capabilities. Each instance feels isolated, but collectively they shape overall performance.

The structure of most firms makes this challenge more complex. Business development responsibilities are distributed across seller-doers who are already managing project delivery. Their focus shifts throughout the week, moving between client work, internal coordination, and pursuit activity. Important details are often captured informally, if they are captured at all. Follow-ups depend on memory and availability. Information is shared in conversations, emails, or meetings, but not always recorded in a way that others can act on.

Over time, this creates a form of operational friction that is difficult to see directly.

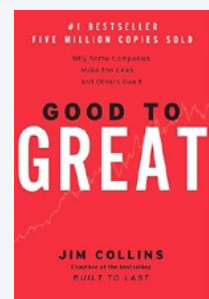
Opportunities remain active, but their status is not always clear. Teams continue to pursue work, but priorities can shift without a shared understanding of why. Leadership reviews the pipeline, but much of the context lives outside the data being presented. The result is a system that is active, but not fully connected. This lack of connection extends into forecasting.

Pipeline visibility depends on consistent definitions and disciplined updates. Without them, forecasts become interpretations rather than reliable indicators. One principal may view an opportunity as highly likely to close based on relationship strength, while another may assess risk differently based on scope or competition. Without a shared framework, these perspectives do not easily translate into a clear picture of future revenue.

This is where unpredictability begins to take hold.

It is not driven by external forces alone. It is reinforced by internal processes that allow variability to accumulate at each stage of the pursuit lifecycle. Qualification varies. Follow-up varies. Proposal execution varies. The combined effect is a pipeline that moves forward, but with uneven momentum.

At the same time, there is a second layer of complexity that compounds the issue. The connection between business development and project delivery is often indirect. Work is pursued based on opportunity and relationship strength, but the implications for staffing, scheduling, and profitability are not always fully visible at the time decisions are made. By the time a project is won, the firm must adjust quickly to align resources and expectations.



**Good to Great,**  
by Jim Collins

Explores how disciplined people, thought, and action create consistent, long-term performance in complex organizations.

This creates pressure on both sides of the business. Delivery teams inherit work that may not have been fully scoped or aligned with available capacity. Business development teams continue to pursue new opportunities without a complete view of how current commitments are unfolding. The two functions are deeply connected in practice, yet often operate with limited shared visibility.

When viewed together, these dynamics explain why growth can feel unpredictable even in strong markets. Most firms operate with the absence of a system that connects each step of the process with clarity and consistency. Without that connection, variability accumulates in ways that are difficult to manage and even harder to anticipate.

Firms that address this challenge begin by making the process more visible. They define how opportunities move from initial contact to qualified pursuit. They establish shared criteria for evaluating which work to pursue. They create clear expectations around follow-up and next steps. Most importantly, they ensure that information is captured in a way that can be used by others across the firm.

As visibility improves, so does alignment. Teams begin to operate with a shared understanding of priorities. Leadership gains a clearer view of what is likely to convert and when. Staffing decisions can be made earlier, with greater confidence. Over time, the system becomes more stable, and growth becomes easier to manage.

The goal is not to remove the human element from business development. Relationships will always remain central. The goal is to support those relationships with a structure that allows the firm to act on them more effectively.

**Build a pipeline  
that wins the right  
clients.**



[Read the eBook →](#)

# The Metrics That Separate High-Performing Firms

At a certain level of maturity, growth becomes less about effort and more about clarity. Two firms can pursue a similar volume of work, invest comparable time in proposals, and maintain equally strong relationships, yet arrive at very different results. The difference emerges in how each firm understands and manages performance.

Metrics provide that visibility. A small group of indicators consistently reveals how effectively a firm is converting opportunity into revenue. Among the most important are win rate, capture rate, and the broader dynamics that shape pipeline efficiency. These metrics do more than describe performance. They expose the quality of decisions made throughout the pursuit lifecycle.

Win rate reflects how often pursued opportunities convert into awarded work. Capture rate extends that perspective by measuring the value of work won relative to the value pursued. Together, they form a practical lens into how well a firm selects, positions, and executes its pursuits.

**Win rate and capture rate tell a deeper story than performance alone. They reflect how well a firm selects opportunities, how early it builds positioning, and how effectively it follows through on each pursuit. When these metrics are reviewed consistently, they shift the conversation from activity to decision quality, which is where meaningful improvement begins.**

— Lucas Gray, Director of Content at BQE Software

## Win Rate (Count-Based)

Win rate measures how often you win the opportunities you pursue.

- $\text{Win Rate} = \text{Number of Proposal Wins} / \text{Number of Proposals Sent}$

### **Example:**

If you submit 100 proposals and win 50 → Win Rate = 50%

### **Important nuance (A/E context):**

Typically excludes sole-source / negotiated work

Focuses on competitive pursuits to ensure apples-to-apples comparison

# Capture Rate (Value-Based)

Capture rate measures how much of the total available revenue you actually win.

- $\text{Capture Rate} = \text{Total Value of Proposals Won} / \text{Total Value of Proposals Sent}$

## **Example:**

If you pursue \$10M in opportunities and win \$4M → Capture Rate = 40%

# Why Both Matter Together

## **These two metrics answer different questions:**

- Win Rate → “How often do we win?”
- Capture Rate → “Are we winning the right work?”

## **A firm can have:**

- A high win rate but low capture rate → winning smaller, lower-value projects
- A moderate win rate but high capture rate → winning fewer, but more strategic opportunities
- This is why capture rate is often more aligned with strategy and growth quality, not just activity.

The variation across the industry is significant. Median win rates sit near 50 percent, while top-performing firms reach into the mid-60 percent range, and lower-performing firms fall into the mid-30s. Capture rates follow a similar pattern, reinforcing that performance differences are rooted in how opportunities are evaluated and pursued long before a proposal is submitted.

Decisions around which opportunities to pursue carry more weight than the proposal itself. Early positioning, relationship depth, clarity of scope, and alignment with internal strengths all influence the likelihood of success. When these factors are considered deliberately, pursuit efforts become more focused and conversion rates improve. When they are handled inconsistently, the pipeline fills with work that consumes effort without a clear path to a successful outcome and firm profitability.

Over time, this distinction shapes how resources are used. A firm that pursues broadly often experiences higher variability, with effort spread across opportunities of uneven quality. A firm with a specific niche, that operates with stronger qualification discipline directs time and attention toward pursuits where it holds a meaningful advantage. Fewer pursuits are required to generate the same or greater results, and the work that is won aligns more closely with the firm’s capabilities. This should be your goal.

Capture rate adds another dimension by introducing a value-based perspective. It highlights whether the firm is securing the right work, not simply securing work. A stable win rate can coexist with underperformance if higher-value opportunities are consistently lost or if awarded projects carry lower fees or greater risk. Over time, this dynamic affects both revenue growth and profitability.

When these metrics are tracked with consistency, patterns begin to surface. Certain markets may show stronger alignment with the firm's expertise. Specific client types may lead to more predictable outcomes. Certain project profiles may repeatedly introduce risk or inefficiency. These insights allow leadership to refine strategy in a way that is grounded in observable trends rather than isolated experiences.

Beyond individual metrics, pipeline efficiency introduces a broader view of how work moves through the firm. One useful way to understand this is through pipeline velocity, which reflects the relationship between the number of qualified opportunities, the average project value, the likelihood of winning, and the time required to close.

Each component influences the others.

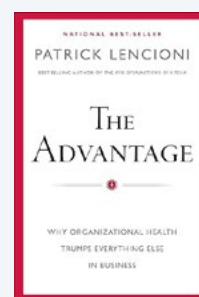
Stronger qualification improves the overall quality of opportunities entering the pipeline. Clear positioning and relationship development increase the probability of success. Streamlined proposal processes shorten cycle time. Higher-value projects amplify the impact of each win. When these elements are aligned, the pipeline begins to move with greater consistency and purpose.

This is where small adjustments create meaningful impact.

A modest increase in win rate, applied across a full pipeline, can translate into substantial revenue growth. When that improvement is paired with shorter pursuit cycles or better alignment with higher-value work, the effect compounds. The system becomes more efficient, not because of a single change, but because multiple elements begin to reinforce one another.

Without consistent measurement, these dynamics remain difficult to see. Wins and losses are experienced as discrete events. Lessons are discussed, but often remain informal. Over time, similar patterns repeat, shaped by individual interpretation rather than shared understanding. This is one of the reasons a CRM system leads to better firm performance.

With consistent measurement, the conversation changes. Pipeline reviews become an opportunity to evaluate decision quality. Discussions focus on why certain pursuits progress while others stall. Outcomes feed back into how future opportunities are assessed. The firm begins to build a shared understanding of what drives success within its specific context.

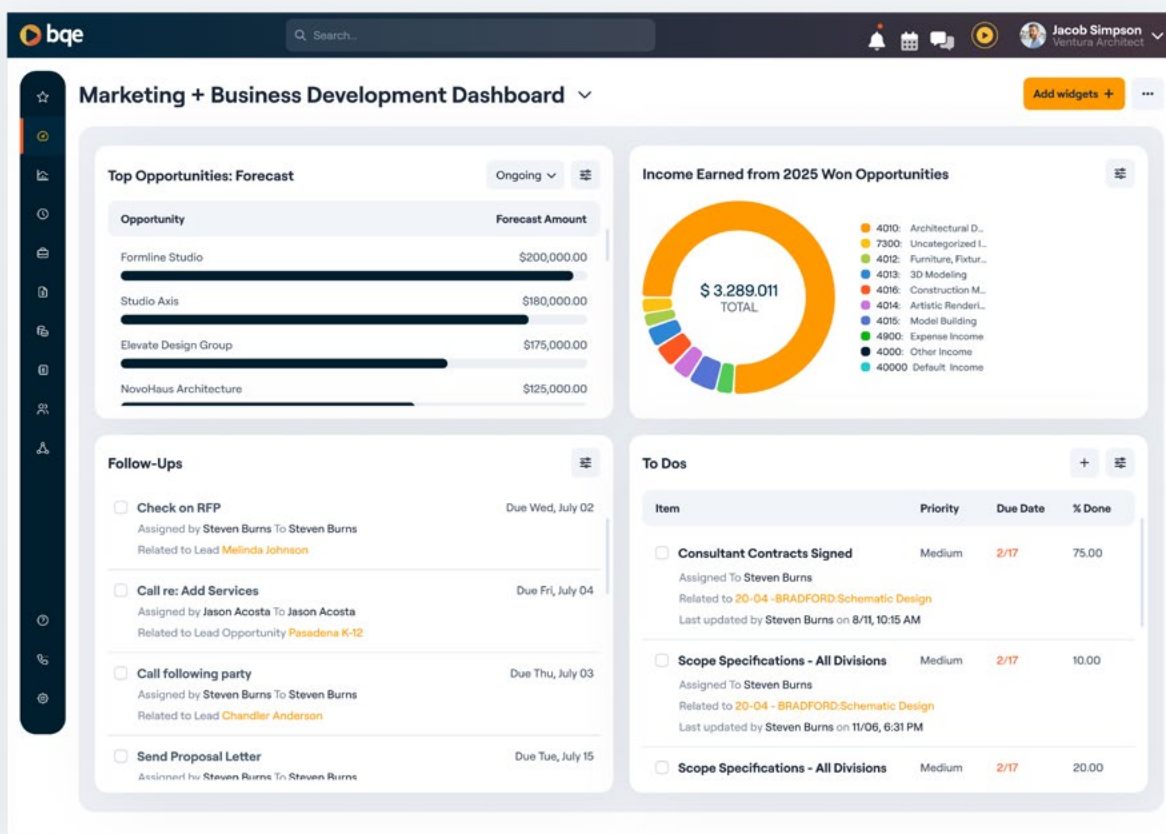


**The Advantage,**  
by Patrick Lencioni

A deeper look at how organizational clarity and disciplined management practices create sustained performance.

That shared understanding becomes a competitive advantage, allowing leadership to allocate resources with greater precision. It supports more confident forecasting. It aligns business development activity with delivery capacity and financial performance. Over time, growth becomes less dependent on isolated efforts and more reflective of a system that is continuously learning and improving.

The metrics themselves are straightforward. The discipline required to apply them consistently is where performance is shaped.



# CRM as a Growth Operating System

By the time a firm begins to measure win rate, capture rate, and pipeline performance with consistency, a new challenge tends to emerge.

Metrics create visibility, but visibility alone does not create alignment. The numbers begin to reveal patterns, yet those patterns are only useful if the firm has a way to act on them in a coordinated and repeatable manner. Without that structure, insights remain disconnected from day-to-day decisions.

This is where many firms reach a natural inflection point. Information exists, but it is distributed. Relationships are known, but not shared. Opportunities are active, but not always visible in a consistent format. Pipeline reviews rely on a mix of reports, conversations, and individual interpretation. Each component provides part of the picture, yet no single system brings them together in a way that supports confident decision-making.

At this stage, a CRM often enters the conversation.

It is frequently introduced as a tool for organizing contacts or tracking opportunities. That framing understates its potential. In architecture and engineering, a CRM becomes far more valuable when it is understood as an operating layer that connects how work is identified, pursued, and ultimately delivered.

The distinction is important. A contact database stores information. A growth operating system structures how that information is used.

When a CRM functions at this level, it establishes a shared framework for how opportunities move through the firm. Leads are identified and qualified using consistent criteria. Prospects are developed with clear ownership and documented interactions. Opportunities are defined with shared visibility into scope, value, and

**A CRM system becomes truly valuable when it reflects how the firm operates day to day. When opportunity data is structured, next steps are visible, and information flows into project and financial workflows, teams gain a shared understanding of what is happening and what needs attention. That visibility supports better decisions and stronger alignment across the business..**

— Matt Cooper, CEO at BQE Software

likelihood. Each stage reflects a meaningful step in the pursuit process, supported by information that others can access and act on.

This creates continuity across roles.

Marketing gains clarity into which opportunities are advancing and where support is needed. Principals and seller-doers can see the full context of client relationships rather than relying solely on personal knowledge. Project leaders gain earlier visibility into potential work, allowing them to anticipate staffing and delivery implications. Finance gains a clearer view of projected revenue and associated risk.

The system becomes a point of alignment rather than a reporting requirement.

This alignment is particularly important in a seller-doer environment, where business development and delivery are closely intertwined. A/E firms rely on technical leaders to build relationships, influence pursuits, and contribute to proposals while also managing active projects. Without a shared system, information tends to remain fragmented across individuals. When a CRM is embedded into how work is managed, it reduces that fragmentation and allows the firm to operate with greater cohesion.

Research reinforces how widespread this dynamic is. In one industry study, a majority of technical staff in A/E firms are involved in business development activities to some extent, alongside their primary project responsibilities. This structure places a premium on systems that minimize friction and make information accessible without adding administrative burden.

Beyond coordination, a CRM also introduces consistency into how decisions are made.

Qualification becomes more deliberate when opportunities are evaluated against shared criteria. Follow-up becomes more reliable when next steps are visible and tracked. Proposal efforts become more efficient when information is centralized and reusable. Over time, these small improvements reduce variability across the pursuit process while saving significant time.

The benefits compound. Opportunities move through the pipeline with greater clarity. Teams spend less time reconstructing context and more time advancing work. Leadership gains a more accurate view of what is likely to convert and when. Decisions that once depended heavily on individual interpretation begin to reflect a shared understanding of the business.

This is where CRM begins to shift from a tool to an operating system. Its value is its ability to connect the firm's activities into a cohesive flow. Relationships inform opportunities. Opportunities inform staffing and financial planning. Delivery



**Playing to Win,**  
by A.G. Lafley and  
Roger L. Martin

A strategic framework for making clear, intentional choices about where to compete and how to win.

outcomes feed back into future pursuits. Each part of the business becomes more aware of the others.

Integration plays a critical role in this transition. When a CRM operates in isolation, its impact is limited by the need to reconcile information across multiple systems. When it is connected to project management, financial data, billing and reporting, it becomes part of a continuous lifecycle. Work that is won transitions seamlessly into projects. Financial performance can be evaluated against the original pursuit assumptions. Lessons learned can be captured and applied to future opportunities.

This continuity is what allows firms to move from reactive growth to managed growth.

The objective is not to formalize every aspect of business development. Relationships remain central, and judgment remains essential. The objective is to create enough structure that the firm can operate with clarity, consistency, and shared visibility.

When that structure is in place, the impact extends beyond business development. Forecasting becomes more reliable. Resource planning becomes more proactive. Financial performance becomes easier to understand in the context of how work was pursued.

Growth begins to feel less like a series of outcomes and more like the result of a system that is working as intended.

The screenshot shows a CRM interface with a table of prospects. A 'Note History' popup is visible over the table, showing two notes for a prospect named James.

Prospect	Company	Phone	Email	Prospect Score	Referred By	Assigned To	Status	Notes
Jenny Wilson	Greenwood Solutions	562-458-2522	alex.johnson@fakemail.c...	75	Robert Stark	Darlene Robertson	Active	Notes <sup>2</sup>
Theresa Webb	Silver Oak Enterprises	576-647-1111	sarah.connor@fakemail...	75		Annette Black	Active	Notes
Darrell Steward	Blue Sky Innovations	119-987-7876	mike.wilson@fakemail.co...	100				Notes
Dianne Russell	Redwood Technologies	333-444-5555	linda.brown@fakemail.c...	100				Notes <sup>3</sup>
Jerome Bell	Maple Leaf Consulting	102-938-4756	james.smith@fakemail.c...	75				Notes <sup>2</sup>
Marvin McKinney	Cypress Creek Holdings	999-222-6666	emily.jones@fakemail.co...	75				Notes
Floyd Miles	Pine Valley Partners	454-654-7654	david.miller@fakemail.co...	80				Notes
Leslie Alexander	Crystal Lake Services	765-987-6543	jessica.davis@fakemail.c...	70		Jenny Wilson	Active	Notes <sup>1</sup>
Albert Flores	Sunset Ridge Group	786-111-0098	robert.thompson@fak...	75	Devon Lane	Eleanor Pena	Active	Notes
Cody Fisher	Mountain Peak Industries	310-353-2222	karen.white@fakemail.co...	50	Ronald Rich...	Robert Fox	Active	Notes <sup>4</sup>

**Note History**

- 6/23 at 3:00 AM  
James called about a new vacation home. He was given our name from Robert Fox.
- 7/02 at 12:28 AM  
I spoke with James about his new vacation home. They are in the process of closing on the purchase of 7 acres in Topanga. Hw wants to see some of the homes we've done on sloped sites. The budget is about \$2.5M

# Designing a Repeatable Pursuit Engine

Every project begins long before a proposal is submitted. It starts with a conversation, a relationship, or a signal in the market that an opportunity may emerge. From that point forward, a series of decisions determines whether that opportunity turns into meaningful work.

In many firms, those decisions happen organically. A principal hears about a potential project and begins informal discussions. Marketing becomes involved once an RFP is released. A team assembles quickly, often under tight timelines, to prepare a proposal. The process works, but it varies each time. The outcome depends heavily on who is involved, how early the firm was engaged, and how effectively information is shared along the way.

Over time, this variability introduces inefficiency and inconsistency.

A repeatable pursuit engine brings structure to this process without removing the flexibility that relationships require. It creates a shared understanding of how opportunities progress, what information is needed at each stage, and how teams coordinate their efforts. The point isn't to standardize creativity, but to ensure that the foundation supporting each pursuit is consistent.

The pursuit lifecycle can be understood as a sequence of stages, each with its own purpose and set of decisions.

## Stage 1

The first stage centers on identification and early qualification. Think of this as your go/no-go phase. Opportunities enter the pipeline through a range of sources, including existing client relationships, referrals, market visibility, and proactive

**A repeatable pursuit process creates consistency without limiting how teams engage with clients. When qualification is clear, ownership is defined, and next steps are visible, pursuits move forward with greater focus and less friction. Over time, that consistency improves both the quality of opportunities pursued and the outcomes that follow.**

— Austin Miller, CMO at BQE Software

outreach. At this point, the emphasis is on clarity. Does the opportunity align with the firm's expertise, strategic priorities, and capacity? Is there an existing relationship or a path to building one? Are the conditions favorable for a competitive pursuit?

Clear qualification at this stage has an outsized impact on overall performance. When opportunities are evaluated thoughtfully, the pipeline becomes more focused. Time and resources are directed toward work with a higher likelihood of success. When qualification is inconsistent, the pipeline fills with pursuits that compete for attention without contributing meaningfully to outcomes.

## Stage 2

The next stage involves developing the opportunity into a defined pursuit. Relationships deepen. Stakeholders are identified. The scope becomes clearer. Internal alignment begins to form around how the firm will position itself. At this stage, ownership becomes critical. A clear pursuit lead ensures that communication remains consistent and that progress is maintained.

Momentum during this phase often determines how the firm is perceived before a formal proposal even begins.

In many cases, decisions are shaped well in advance of an RFP. Clients form impressions based on early interactions, responsiveness, and the firm's understanding of their needs. A structured approach to tracking interactions, commitments, and next steps helps ensure that these early impressions are intentional rather than incidental.

## Stage 3

The proposal stage is where the effort becomes most visible, but it is not where success is determined. By the time a proposal is assembled, many of the critical factors influencing the outcome have already been established. The strength of the relationship, the clarity of positioning, and the alignment of the team all play a significant role.

A repeatable pursuit engine ensures that proposal development builds on a strong foundation rather than compensating for gaps.

Centralized access to past proposals, project experience, and firm qualifications reduces the time required to assemble materials. Defined workflows help coordinate contributions across technical staff, marketing, and leadership. Clear timelines and responsibilities reduce last-minute pressure and improve overall quality.



**Playing to Win,**  
by A.G. Lafley and  
Roger L. Martin

A strategic framework for making clear, intentional choices about where to compete and how to win.

## Stage 4

Following submission, the process continues. Outcomes are evaluated. Wins transition into projects. Losses provide insight into how future pursuits can improve. This stage is often overlooked, yet it is where long-term improvement takes shape.

Without a structured approach to capturing and reviewing outcomes, valuable information is lost.

Win and loss analysis provides a feedback loop that strengthens the entire system. Patterns emerge around which types of work are most successful, where positioning resonates, and where gaps exist. These insights inform future qualification decisions, proposal strategies, and relationship development efforts.

Over time, the pursuit engine becomes more refined.

Each stage builds on the previous one. Information flows forward, and lessons flow back. The firm develops a clearer understanding of what drives success within its specific markets and client base. Effort becomes more focused. Outcomes become more consistent.

Technology plays an enabling role in this process, but it is the structure that creates value. When stages are clearly defined, ownership is established, and information is captured consistently, the system becomes easier to manage and scale.

This is particularly important as firms grow.

What works for a small team, where knowledge is shared informally, becomes more difficult to sustain across multiple offices, disciplines, and leaders. A repeatable pursuit engine allows the firm to maintain consistency without relying on individual memory or ad hoc coordination.

The result is a more deliberate approach to growth. Opportunities are pursued with greater clarity. Teams operate with shared context. Leadership gains visibility into both current activity and future potential. Over time, the firm builds a system that supports both performance and scalability.

# Connecting Winning Work to Profitability

Winning work is only part of the equation. The more consequential question is what happens next.

A project that begins with strong positioning and a clear understanding of scope has a very different trajectory than one that enters the firm with uncertainty. The way work is pursued shapes how it is delivered. Decisions made during business development carry forward into staffing, execution, client experience, and ultimately financial performance.

Pursuits are evaluated based on the likelihood of winning. Delivery is evaluated based on project performance. Financial results are reviewed after the fact. Each stage is managed with care, yet the relationships between them are not always fully visible. Over time, this separation creates gaps in understanding. A project may be won successfully, but still struggle to meet expectations once delivery begins. Another may perform well operationally but was priced or scoped in a way that limits its overall contribution to the firm.

When the transition from pursuit to project lacks structure, information is lost. Assumptions made during business development may not fully carry through to the delivery team. Context around client expectations, risk factors, or scope nuances may not be communicated. By the time the project is underway, teams are working to reconcile what was promised with what is actually required.

This is where profitability is shaped, often in ways that are difficult to recover from.

Realization provides one of the clearest indicators of this dynamic. It reflects how effectively the firm converts planned revenue into actual revenue, taking into account write-downs, scope adjustments, and pricing discipline. A project that begins with strong alignment between pursuit assumptions and delivery execution

**Profitability is shaped early in the pursuit process, long before a project begins. When scope, pricing, and expectations are clearly defined and carried through to delivery, teams can execute with confidence and maintain strong realization. When that alignment is missing, even well-run projects can struggle to meet financial expectations.**

— Dan McCormick, CRO at BQE Software

is far more likely to maintain high realization. A project that begins with gaps in that alignment tends to introduce friction as it progresses.

Qualification influences whether the firm pursues work that aligns with its strengths. Positioning influences how clearly scope and expectations are defined. Proposal development influences how accurately fees reflect the work required. Each of these elements contributes to the conditions under which the project will be delivered.

When they are handled deliberately, the transition into delivery is smoother. When they are inconsistent, delivery teams are left to navigate uncertainty that originated earlier in the process.

An example helps illustrate this dynamic.

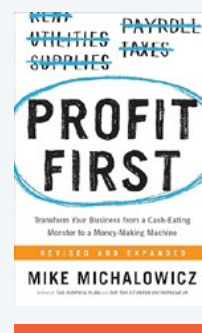
Consider a mid-sized engineering firm pursuing two projects of similar size and fee. Both opportunities come from established relationships. Both are viewed as strong fits. Both are ultimately won.

In the first case, the pursuit is approached with clear structure. The opportunity is qualified early, with attention to scope, timeline, and client expectations. Internal discussions align business development and project leadership before the proposal is finalized. Assumptions around staffing, effort, and risk are documented and shared. The fee is developed alongside the project managers using historic data from similar project types. When the project is won, the delivery team begins with a clear understanding of how the work was scoped and priced.

As the project progresses, decisions remain consistent with those initial assumptions. Adjustments are made with awareness of their impact on both client expectations and financial outcomes. The project maintains strong realization, and the team has visibility into performance throughout.

In the second case, the pursuit unfolds differently. The relationship is strong, and confidence in winning is high, but qualification is less structured. Scope evolves through conversations that are not fully documented. Internal alignment happens late in the process. The proposal is completed under time pressure, with limited opportunity to reconcile assumptions across the team. The fee is a rough guess based on how long a principal thinks it will take to complete the work.

When the project begins, the delivery team inherits a set of expectations that are not fully aligned with the original plan. Additional effort is required to clarify scope. Adjustments are made along the way, often in response to immediate needs rather than a shared understanding of the project's financial framework. Realization begins to erode, not because of a lack of capability, but because of misalignment that originated earlier. The fee didn't cover the actual effort to deliver.



**Profit First,**  
by Mike  
Michalowicz

A perspective on how intentional financial structure and discipline shape sustainable business performance.

Both projects were won successfully. Their outcomes diverge based on how they were pursued.

This pattern appears frequently across firms of all sizes. It reinforces the idea that business development and delivery are not separate functions. They are part of a continuous system where early decisions shape later outcomes.

When this system is connected, performance becomes easier to manage. Opportunities are evaluated with an understanding of delivery implications and proposals reflect realistic assumptions about effort and risk. Project teams begin with full visibility into how the work was positioned and priced. Financial performance can be assessed in the context of those original assumptions, creating a clear feedback loop. This feedback loop is where long-term improvement takes hold.

Insights from project performance inform how future opportunities are qualified. Patterns in realization highlight where pricing or scope definition can be strengthened. Over time, the firm develops a more integrated understanding of how decisions at each stage contribute to overall performance.

Technology supports this connection when it allows information to flow seamlessly from pursuit to project and into financial reporting. When opportunity data, project setup, and performance metrics exist within a shared environment, the firm gains a more complete view of how work moves through the business.

This visibility supports better decisions when leadership can evaluate pipeline not only in terms of potential revenue, but in terms of alignment with capacity and profitability goals. Project teams can operate with a clearer understanding of expectations and finance can assess performance with context, rather than relying solely on outcomes.

The result is a more deliberate approach to growth.

Winning work remains important. The emphasis shifts toward winning work that can be delivered successfully, profitably, and consistently. Each stage of the process reinforces the next, creating a system where growth and performance are closely aligned.

# Conclusion: Building a Firm That Learns and Scales

Growth in architecture and engineering is shaped by a sequence of decisions. Which opportunities to pursue. How those opportunities are positioned. How work is delivered. How outcomes are evaluated and applied moving forward.

When those decisions are disconnected, performance becomes difficult to manage. Wins arrive, but without consistency. Forecasts shift as new information surfaces. Teams spend time reconciling context instead of advancing work. The firm continues to move forward, but without a clear sense of control.

A different pattern emerges when those decisions are connected.

Opportunities are evaluated with an understanding of how they will be delivered. Pursuits are coordinated with shared visibility into priorities and next steps. Project teams begin with clarity around scope, expectations, and financial assumptions. Outcomes are reviewed in a way that informs future decisions rather than remaining isolated experiences.

Each pursuit contributes to a growing body of knowledge about what drives success within the firm. Over time, that knowledge becomes embedded in how opportunities are selected, how teams are aligned, and how performance is measured. The firm develops a clearer sense of direction, supported by a system that reinforces consistency without limiting flexibility.

This is what allows a firm to scale.

As organizations grow, informal communication becomes harder to sustain. Relationships expand across people, offices, and disciplines. Complexity increases and without a shared structure, alignment becomes more difficult to maintain and performance begins to fragment.

A well-designed operating model provides continuity through that growth. It connects relationships, pursuits, projects, and financial outcomes into a single, coherent system. It ensures that information is visible, decisions are aligned, and teams are working from a shared understanding of how the business operates.

CRM systems play a central role in enabling this model when it is implemented as part of how the firm works, rather than as a standalone tool. It becomes the system that supports visibility, reinforces process, and connects each stage of the business.

The result is a firm that operates with greater clarity and intent.

Growth becomes more predictable. Decisions become more informed. Teams operate with stronger alignment. Over time, performance improves because the system behind it continues to evolve.

The firms that build this capability position themselves to navigate complexity with confidence. They are able to learn from experience, apply that learning consistently, and create a foundation for sustained, long-term growth.

# CRM Adoption Checklist

- ✓ — How to implement a CRM system that connects business development, project delivery, and financial performance
- ✓ —
- —

## Foundation & Alignment

- Define your business development stages (Lead → Qualified → Pursuit → Proposal → Win/Loss)
- Align leadership on clear criteria for which opportunities to pursue
- Establish a consistent definition of win rate and capture rate across the firm

## Data & Structure

- Standardize required fields for every opportunity (client, project type, estimated fee, stage, next step, owner)
- Create consistent lists for markets, industries, and lead sources
- Eliminate duplicate tracking across spreadsheets, emails, and disconnected tools

## Ownership & Accountability

- Assign a single owner to every opportunity
- Require a defined next step and date for all active pursuits
- Set expectations for regular updates so pipeline data remains current and reliable

## Pipeline Visibility & Decision-Making

- Establish a weekly pipeline review focused on priorities, risks, and next steps
- Use pipeline data to inform staffing and resource planning discussions
- Track opportunity value and probability to improve forecast accuracy

## Integration with Delivery & Finance

- Ensure opportunities can convert directly into projects without re-entering data
- Align pursuit assumptions (scope, fee, timeline) with project setup
- Connect pipeline visibility to financial metrics like revenue forecasts and realization

## Proposal Efficiency & Consistency

- Centralize proposal content, past projects, and firm qualifications
- Standardize proposal workflows across marketing, technical staff, and leadership
- Reduce manual effort by reusing structured data from opportunities

## Closed-Loop Learning

- Track win/loss outcomes with clear reasoning
- Identify patterns by client type, project type, and market sector
- Feed insights from project performance back into future pursuit decisions

## Adoption & Scalability

- Choose a system that integrates CRM with project management and financial data
- Minimize duplicate entry by connecting CRM to time, billing, and reporting workflows
- Start with a simple structure, then expand reporting and analytics over time

## Final Check

- Your CRM reflects how your firm actually pursues and delivers work
- Your team uses it as part of their daily workflow, not as a separate task
- Leadership can clearly see pipeline, performance, and future revenue in one place

# Resources

Running a better architecture or engineering firm takes more than experience. It requires clear insight, practical tools, and guidance you can trust. This is where we can help. Our resource library is built for firm leaders who want to improve financial performance, strengthen project delivery, and make more confident decisions. Inside, you will find webinars that turn complex topics into clear actions, articles that challenge how firms operate and grow, and reports and ebooks grounded in real data and experience.

You can also put ideas into practice with tools, templates, and checklists designed for immediate use, connect with peers through user groups, and learn from real customer success stories. Every resource is created with one goal in mind: to help you run a better firm. Explore what is most relevant to you and take the next step forward

[Webinars](#)

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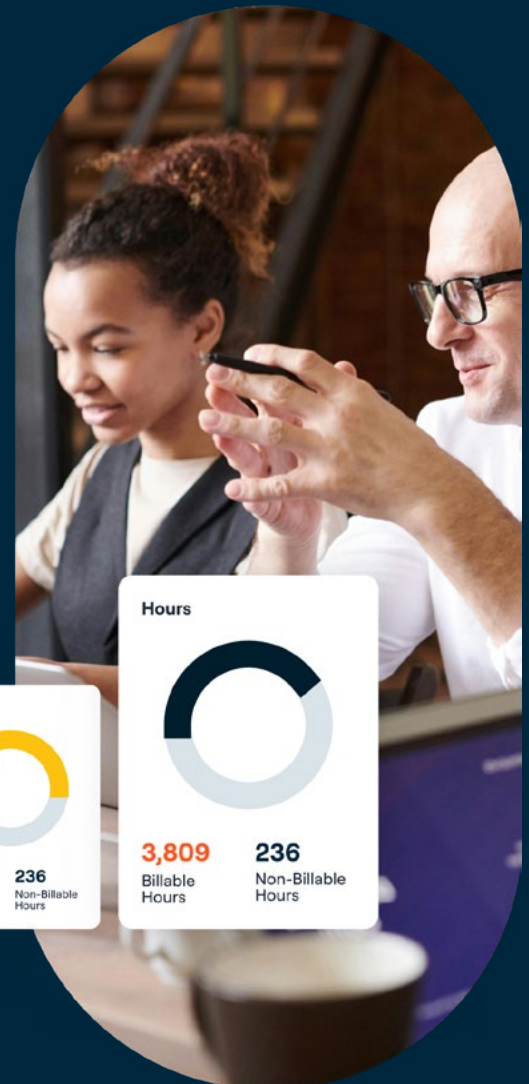
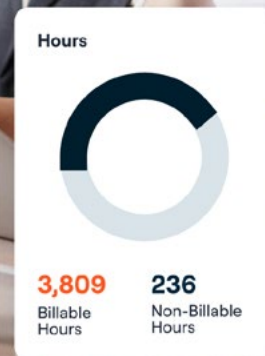
[User Groups](#)

# BQE CORE

If you're serious about improving efficiency and profitability, you need access to technology that makes the process of tracking Key Performance Indicators (KPIs) straightforward. BQE CORE is an all-in-one firm management platform with integrated accounting and project management tools that's backed by a company with over 30 years of experience and countless end users worldwide. It was designed by an engineer and architect to give their firms the tools they needed to thrive. Thus all of the built-in features are designed to address the pain points A/E firms typically face.

BQE CORE can streamline your business processes, while simultaneously providing groundbreaking insights that will help grow your firm, all from the convenience of a desktop computer, laptop, or mobile device. BQE CORE makes it easier than ever to collaborate with both your team and clients.

**Running your business should be exciting, not chaotic. That's why we're here, and most importantly, why we developed CORE.**



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