



# Deltek

## How Generative AI Can Streamline Processes and Boost Productivity in Engineering Firms



Presented by:  
**Bret Tusaus**  
Vice President of Product Management  
Deltek

Facilitated by:  
**Fiona Johann, PMP, AEC PM**  
Strategic Initiatives Team Lead  
Engineering Management Institute

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## PURPOSE & LEARNING OBJECTIVES

**Purpose:** to equip engineering leaders and project managers with practical strategies to use AI for streamlining project management, boosting efficiency, and improving decision-making — helping firms stay competitive in today's challenging industry landscape.

### Learning Objectives:

By the end of this session, participants will be able to:

- **Explain** how AI technologies can enhance key project management processes by automating routine tasks, improving workflows, and optimizing the use of resources to boost efficiency and competitiveness.
- **Identify** common barriers to adopting AI within engineering firms and **apply** practical strategies and a proven framework to successfully integrate AI tools into existing operations.
- **Demonstrate** how AI-generated insights can support strategic planning and decision-making, ultimately driving improved project delivery, profitability, and sustained competitive advantage in a rapidly evolving industry.

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## INTRODUCTION Fiona Johann, PMP, AEC PM



**Fiona**

Johann, PMP,  
AEC PM

- **PMP-certified Project Manager** with a background in higher education leadership
- Partners with AEC professionals to build strong project management and leadership skills
- Experienced in strategic initiatives, program development, and stakeholder engagement
- Focused on helping engineers become confident, effective project leaders

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# INTRODUCTION

## Bret Tushaus



**Bret**

Tushaus

- Architect by training with 15+ years of AEC industry experience
- Leads product strategy for ERP and tech solutions that address operational pain points
- Champions project management and digital transformation across AEC organizations
- Dedicated to equipping project managers with tools for better project outcomes



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## Business Pressures and Challenges



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## Business Pressures and Challenges

Availability of  
good candidates

Finding and  
retaining  
qualified staff

Inflation and  
interest rates

Socioeconomic  
disruption

Increasing  
project  
complexity

Political  
uncertainty

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## Business Pressures and Challenges

Is Technology the  
Answer?

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# Business Pressures and Challenges

67% expecting to lose market share within two years if they fail to progress significantly in **digital transformation.**

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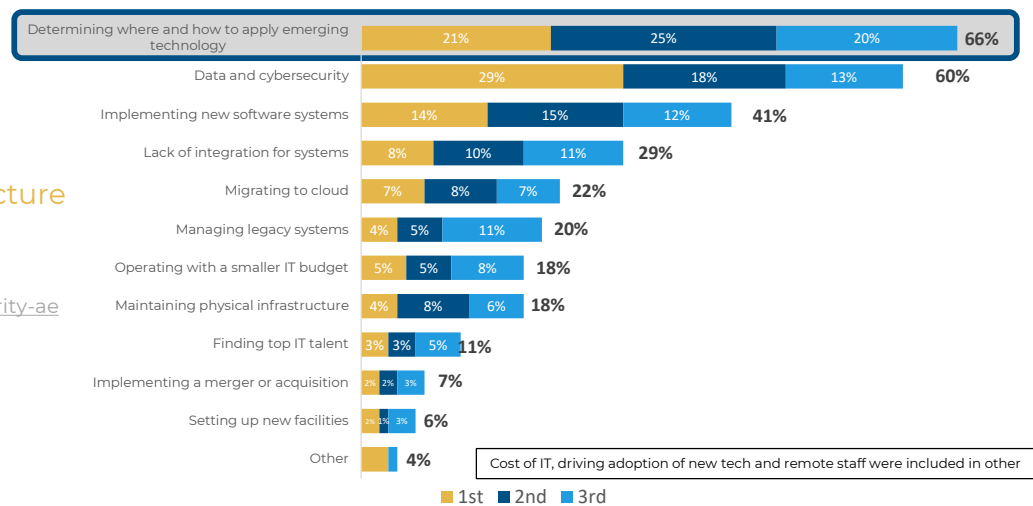
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## But Digital Transformation is Difficult

*What are the Top 3 Technology-Related Challenges your company's operations face in the next 12 months?*

**Deltek.  
CLARITY**  
45<sup>th</sup> Annual Architecture  
& Engineering  
Industry Study

<https://info.deltek.com/clarity-ae>



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## Business Pressures and Challenges

# Technology is an Answer

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AI productivity boost has the potential to increase global GDP by up to **\$13 trillion** by 2030  
- McKinsey Global Institute (2020)

**77% of companies** were either using or exploring the use of AI – generative AI on of most rapidly adopted technologies  
- IBM Global AI Adoption Index (2023)

Generative AI used for design optimization and simulation can **reduce design time by up to 30%**  
- Autodesk (2022)



Organizations using AI for decision-making saw a **20% increase in project success rates**  
- McKinsey Global Institute (2021)

AI-driven collaboration tools can **enhance team productivity by 25%**, underscoring their importance in project management  
- Forrester (2021)

AI-driven automation of repetitive engineering tasks can **reduce project execution time by up to 25%**  
- Deloitte (2022)

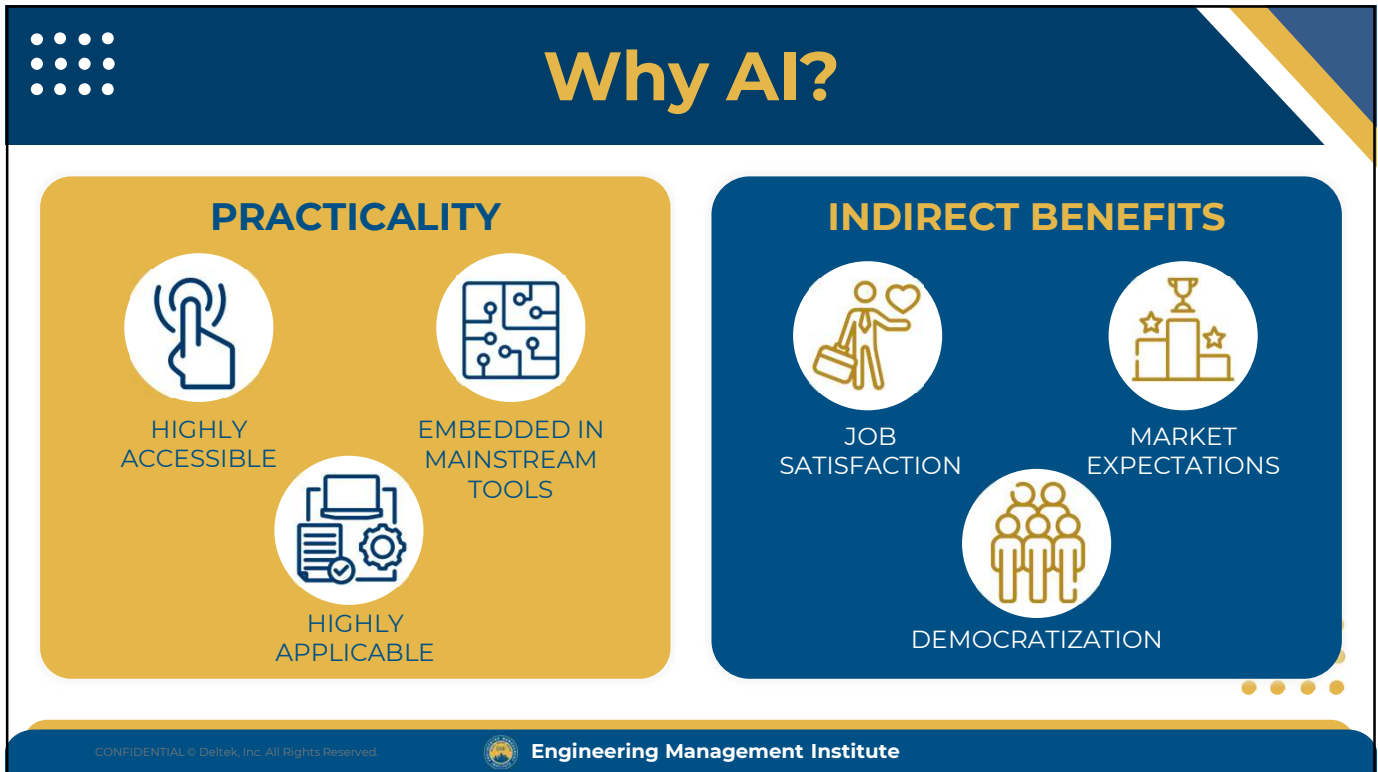
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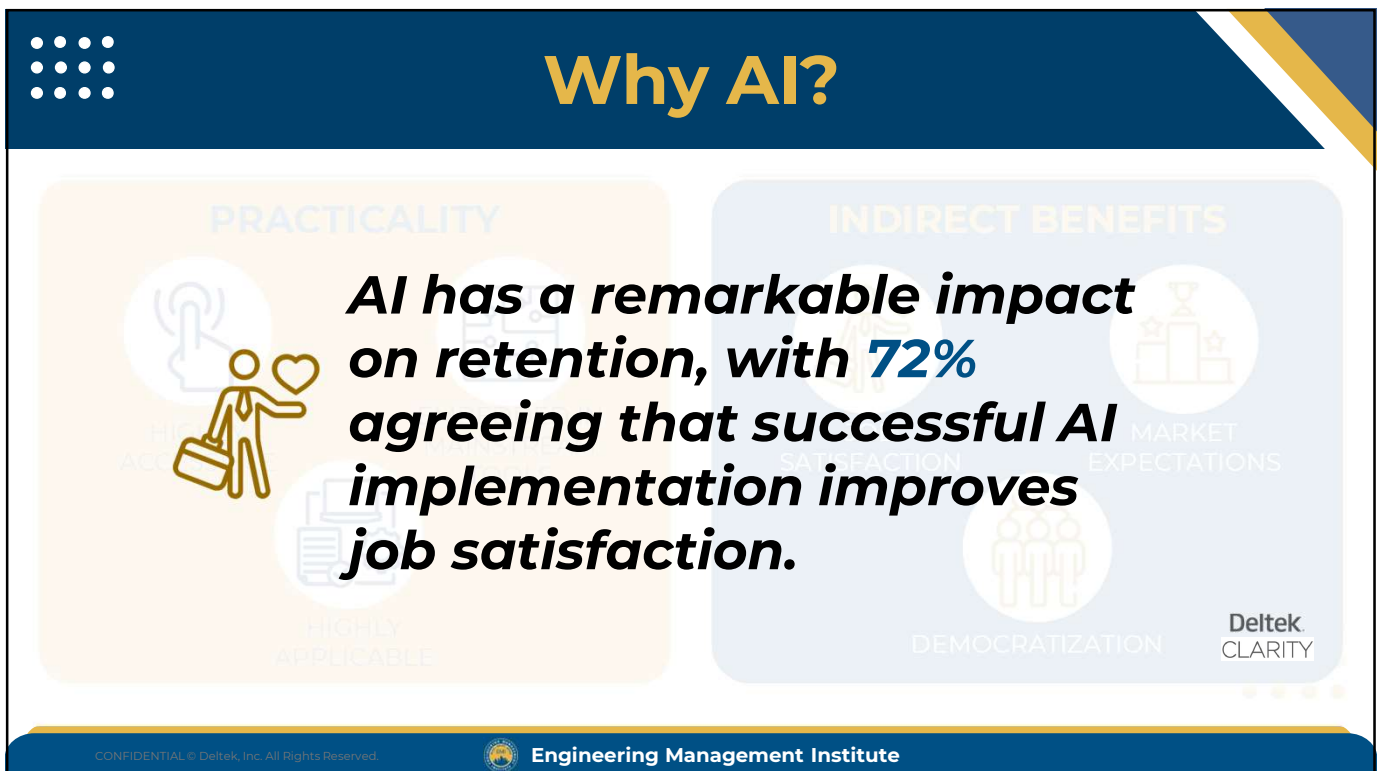
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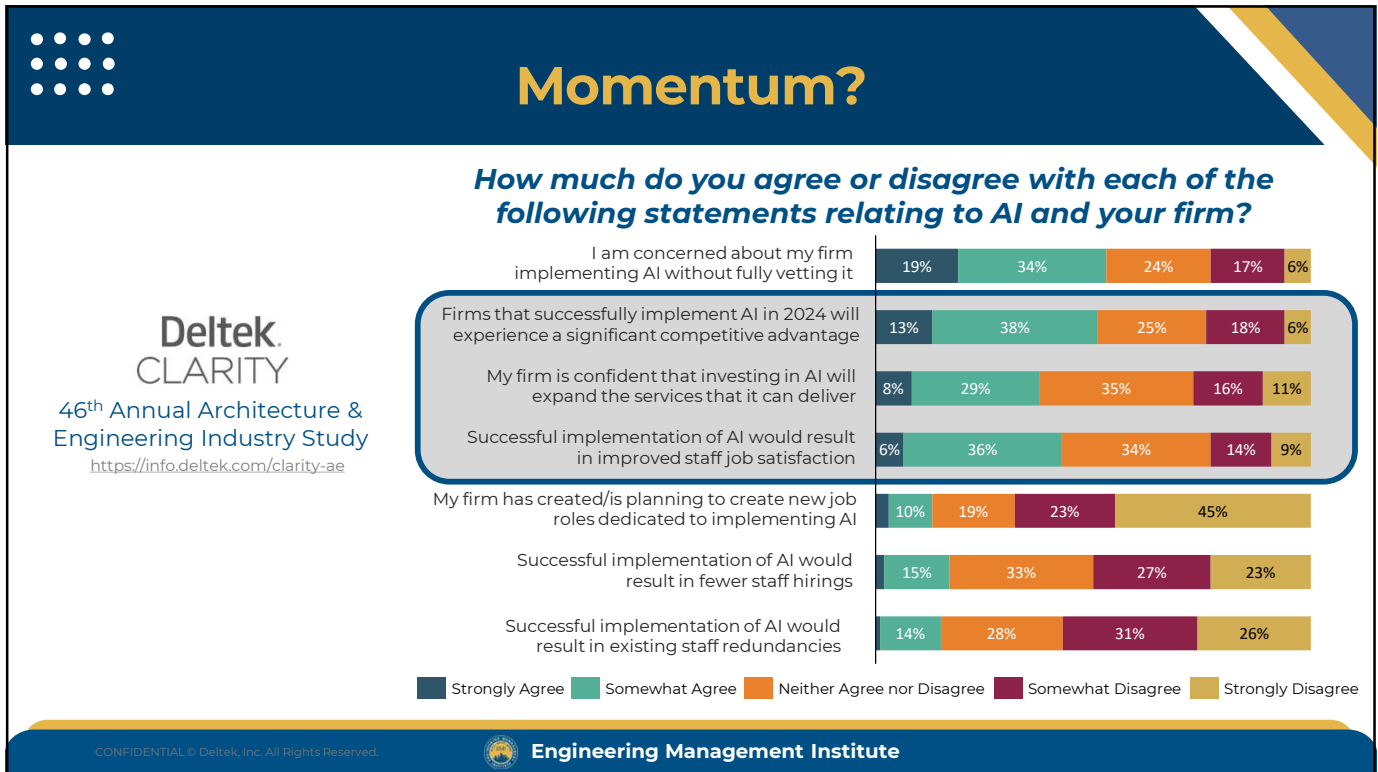


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***You don't need to master AI to benefit from it. You just need to start.***



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## Making Your Project Lifecycle Smarter with AI

Thinking about artificial intelligence (generative and traditional), new ways of doing things, use cases and scenarios that are relevant and accessible (economically and understandably) – spanning spectrum of operational efficiency to domain-specific optimization



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# Making Your Project Lifecycle Smarter with AI

## Key Takeaways:

- » Areas, ideas, tools you can explore...
- » Things you can do to ensure you are in the best position...

(not a commercial for Deltek)



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# Making Your Project Lifecycle Smarter with AI

- » **Win**
  - » Content Creation
  - » Summary and Distillation
- » **Manage**
  - » Predicting Project Success
  - » Digital Assistants
- » **Develop**
  - » Content Analysis
  - » Digital Assistants
- » **Deliver**
  - » Generative Design
  - » Natural Language Interface
- » **Measure**
  - » Data Analysis
  - » Intelligent Exploration



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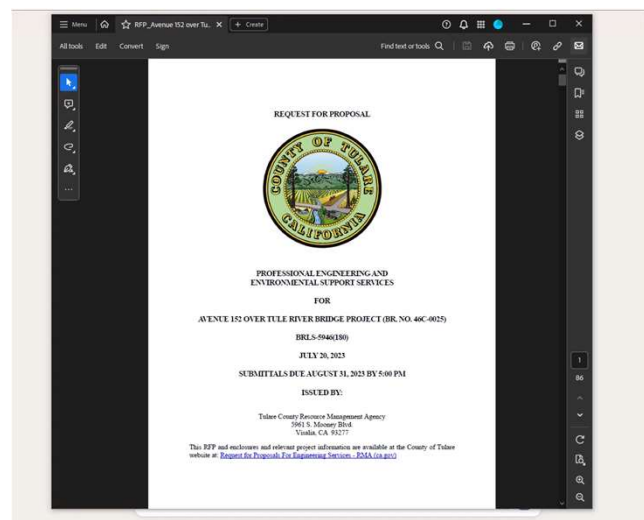


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## Content Creation, Summary and Distillation

- » GPT tools are not just about the data/content within them – you can utilize them with your data and content
- » Leverage to “read” and summarize RFPs to capture salient points and requirements

Claude - <https://claude.ai/>

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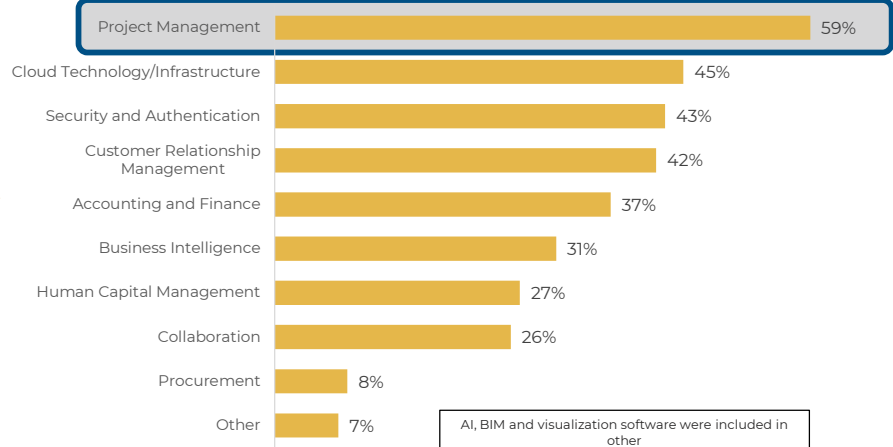
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## Predicting Project Success

*In the next 12 months, which business application systems does your company plan to invest in?*



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45<sup>th</sup> Annual Architecture & Engineering Industry Study

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# Predicting Project Success

- » Equip project managers with the right tools
- » Develop project management best practices
- » Build and manage project plans; good data in produces valuable insights out
- » Leverage BI and AI and put key indicators at the fingertips of your project managers



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**Use the Company Brain to Manage and Predict Your Project Success**

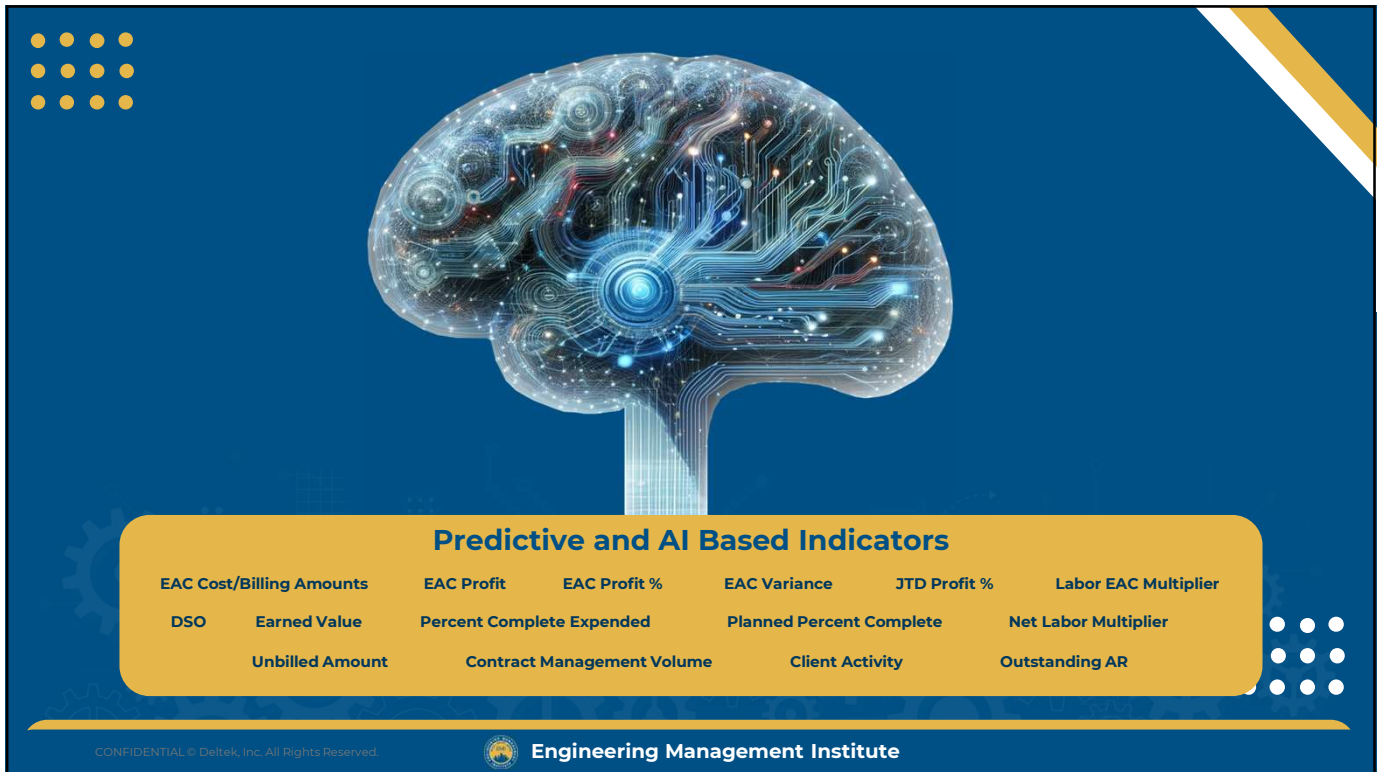
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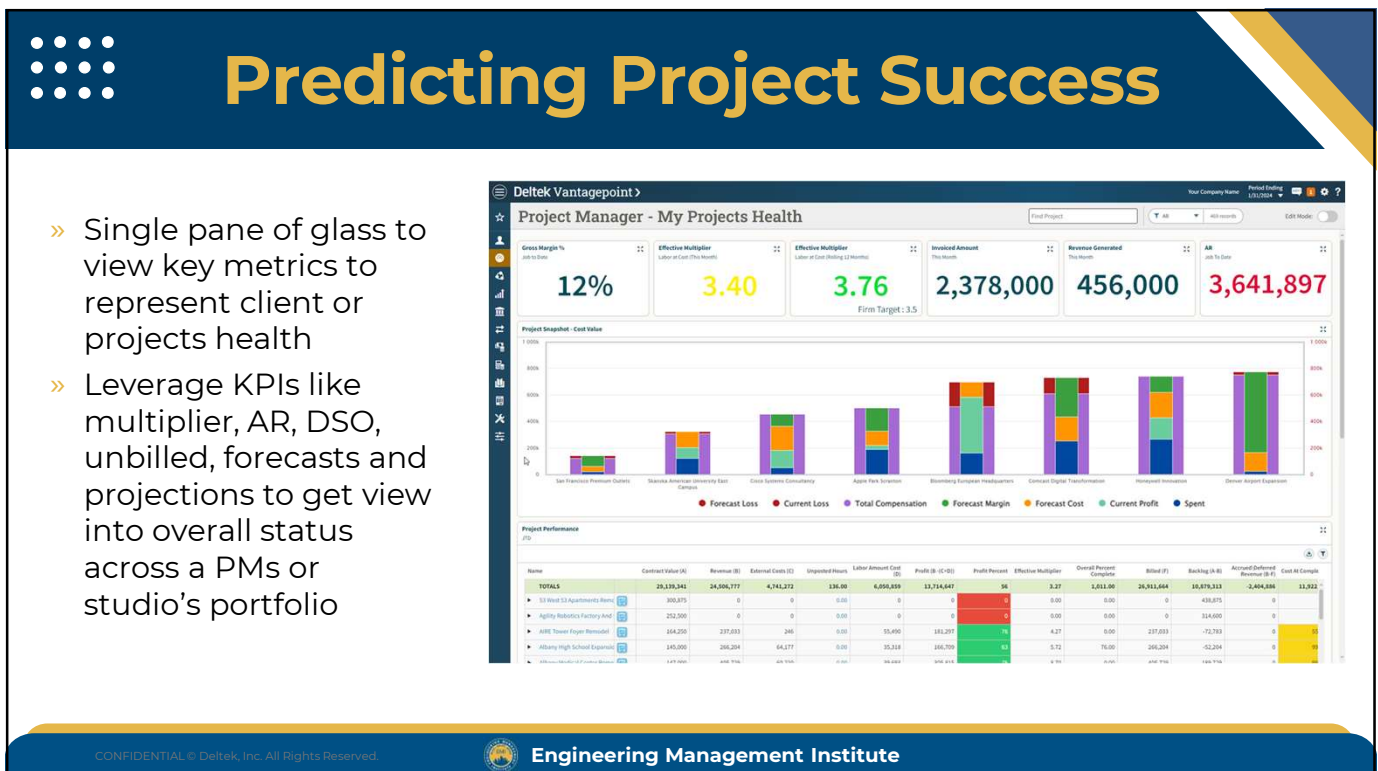
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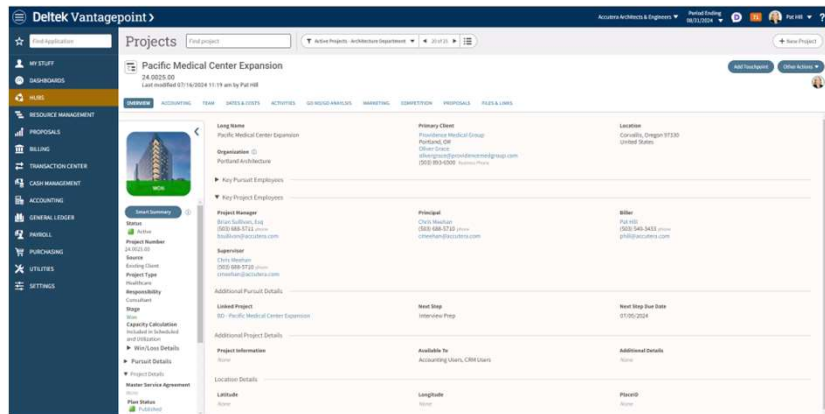
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# Digital Assistant

- » Leverage the data that is a byproduct of your project management processes to do work for you
- » Natural language interface to generate content
- » Save time and receive counsel from massive amount of data in LLMs



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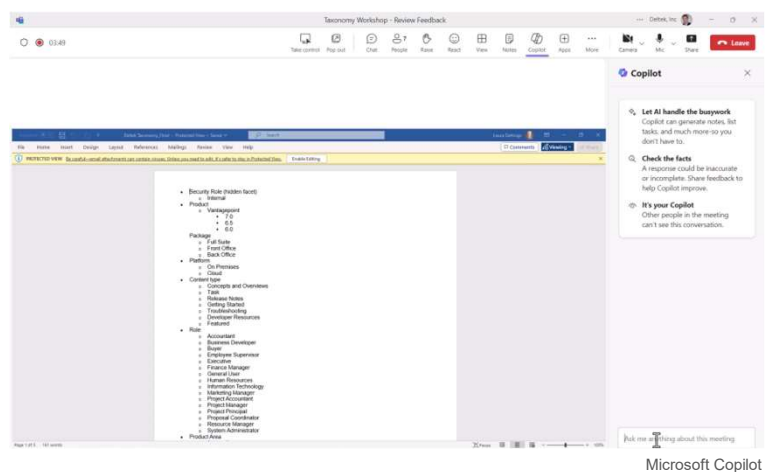
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# Digital Assistant

- » Digital Assistants are everywhere and Microsoft Copilot is a highly effective way to quickly, easily and safely equip your workforce with AI
- » Improve everyday tasks, gain insights from data quicker and easier, iterate around content with more agility
- » Free up time to focus on more value-adding tasks and initiatives
- » Improve your teams' ability to service your clients



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# Making Your Project Lifecycle Smarter with AI

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## Content Analysis

- » GPT tools are not just about the data/content within them – you can utilize them with your data and content
- » Leverage to gain insight, advice, ideas, comparisons
- » Not really artificial intelligence but the intelligence of those that came before you

**9006BR - Sr Prod Mgmt Spec**  
Senior Product Management Specialist

**Company Summary:**  
As the leading global provider of enterprise business, Deltek helps organizations of varied backgrounds across the world of for learning, growing and making a difference through innovative solutions, with a focus on the construction industry.

**Business Summary:**  
Deltek Enterprise Product Strategy is a team of experts for project-based businesses. We experience that current processes across the globe are not working. Our employees and our culture that has been recognized globally earned one of America's Best Midsize Top Workplaces and a Best Place to Work.

**Position Responsibilities:**  
We are seeking a bright, collaborative, and Management Team for our construction solution.

**Do you have experience for collaborating with engineering, database administrator or requirements into product features. You're releases and ensuring a positive customer experience to global working hours.**

**What You Are:**

- Technical Background: Strong background in software development, agile project management, and cross-functional collaboration.
- Cloud Expertise: In-depth knowledge of cloud technologies, including AWS, Azure, and Google Cloud.
- Product Development: Ability to guide product development from concept to launch, ensuring alignment with business goals and customer needs.

**Education:**

- Bachelor's in Technology (Software Engineering or Technology)
- High School Diploma or GED
- IT Skills: Proficiency in various IT tools and technologies.

**Experience:**

- Product Development: 5+ years of experience in product development, including requirements gathering, design, development, testing, and deployment.
- Team Management: Experience in managing a team of developers, designers, and QA engineers.
- Project Management: Strong project management skills, including planning, execution, monitoring, and closure.
- Communication: Excellent communication skills, both written and verbal, with the ability to present and explain complex technical concepts to non-technical stakeholders.

**Skills:**

- Technical Skills: Proficiency in programming languages (Python, Java, JavaScript), frameworks (React, Angular, Node.js), and databases (MySQL, PostgreSQL).
- Soft Skills: Strong problem-solving abilities, attention to detail, and the ability to work under pressure.

**What questions would you suggest I ask when interviewing?**

Here are some suggested questions to ask during the interview to assess his fit for the Senior Product Management Specialist role:

- Can you walk me through a specific example of how you defined the product strategy and roadmap for a product? What factors did you consider and how did you prioritize initiatives?
- How do you typically work with Engineering teams? Can you share an example of how you collaborated with Engineers to design a product and define the requirements?
- How do you approach prioritizing the product backlog? How do you balance market needs, customer requests, and technical debt?
- Can you describe your experience with cloud technologies, specifically AWS and Azure? How have you worked with cloud ops teams to coordinate deployments, maintenance, upgrades, etc?
- Tell me about a complex product or technical challenge you faced. How did you troubleshoot the issue and what was the outcome?
- How do you make product decisions and trade-offs? What data or inputs do you rely on? Can you share an example of a tough product decision you had to make?
- Describe your experience with agile development methodologies. What is your involvement in across ceremonies like sprint planning, standups, reviews and retrospectives?
- What is your approach to product launches? How do you prepare for a launch and measure success? What post-launch activities do you oversee?
- Can you share more about your experience with SaaS products and cloud deployment models? How do you think product management differs for on-prem vs. cloud?

Reply to Claude...  
Claude 3 Opus

Claude - <https://claude.ai/>

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## Generative Design

- » Floor plans, layouts, lighting, egress
- » Many generative design tools from which to choose
- » Iterate and analyze across many dimensions
- » Explore scenarios at pace and scale

Finch 3D - <https://www.finch3d.com/>

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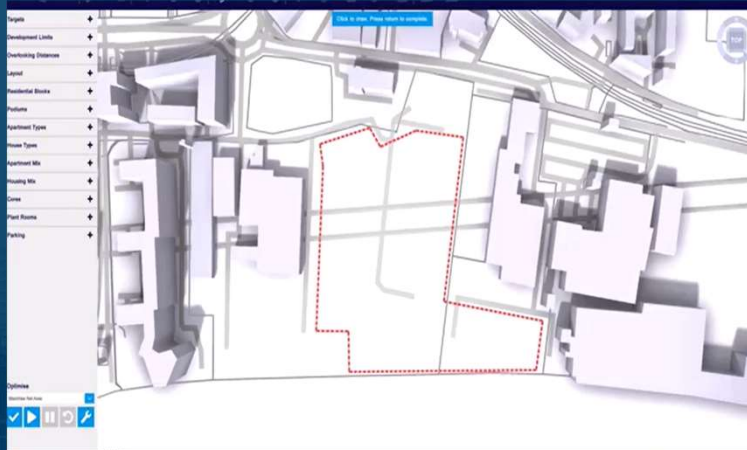


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# Generative Design



SiteSolve - <https://sitesolve.vu.city/>

- » Site analysis, massing, sunlight and shadows, zoning constraints, usage types
- » Many generative design tools from which to choose
- » You set the criteria and constraints, the tool iterates

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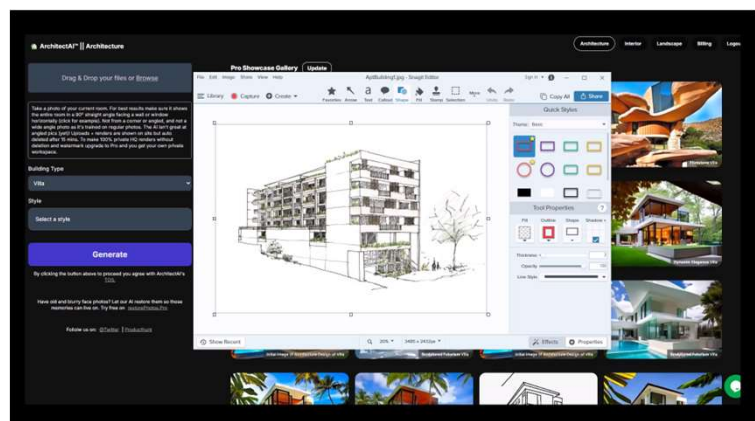
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# Generative Design

- » Image generators and AI based rendering tools drive the art of the possible
- » Many imaging tools from which to choose
- » Style and treatment exploration at pace and scale



ArchitectAI - <https://architectai.app/>

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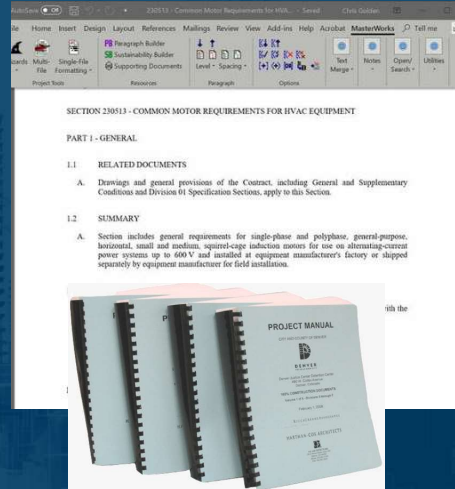
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# Specifications Management

*How have we  
been authoring  
and managing  
specifications, forever?*



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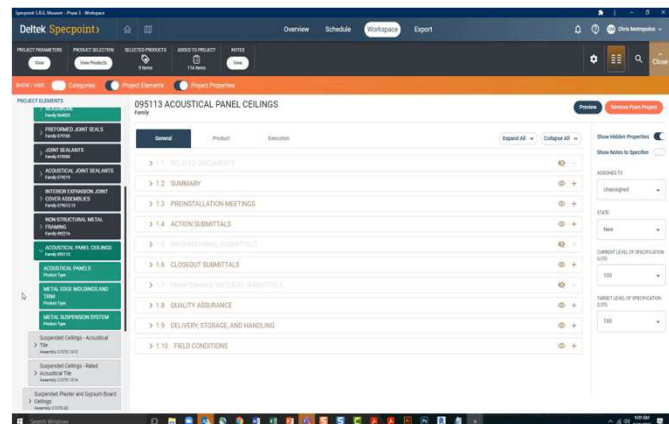


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## Digitally Transforming Specifications

- » Responding to industry trends and sentiments
- » Collaborative easy to use modern visual user interface
- » Intelligent design automation for more accurate specifications – reduce your organization's risk
- » Strong foundation as the home of **AIA MasterSpec®**
- » One Platform Serving architects, engineers and building product manufacturers
- » Cloud-based for anytime/anywhere access



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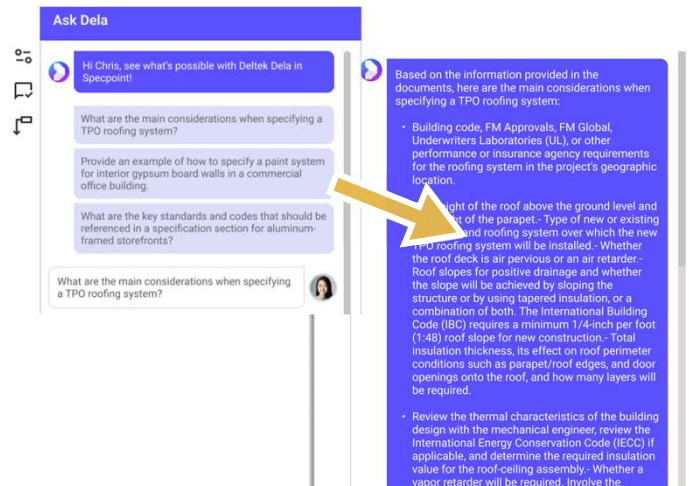
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# Digitally Transformation Specifications

- » Have a conversation with your specifications
- » Natural language interaction
- » Answers, insights, data at your fingertips
- » Respond to inquiries in seconds



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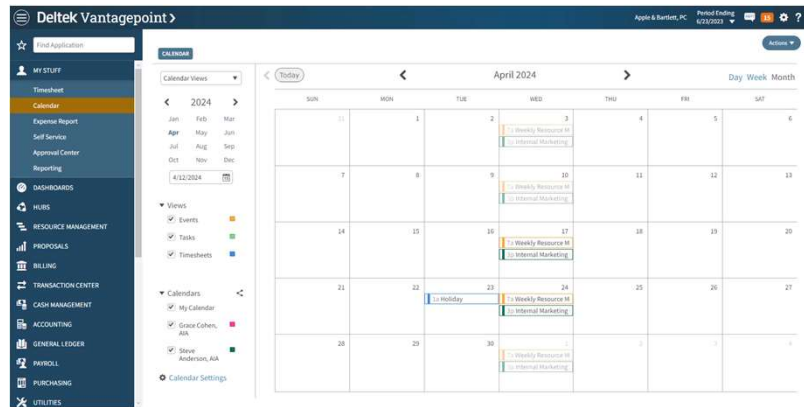
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# Digital Assistant

- » Natural language exploration to find the information you need
- » Replace the need to know where to find information and how to configure and run reports
- » Put the information at your fingertips in a natural language way
- » Not really artificial intelligence but the intelligence of those that came before you



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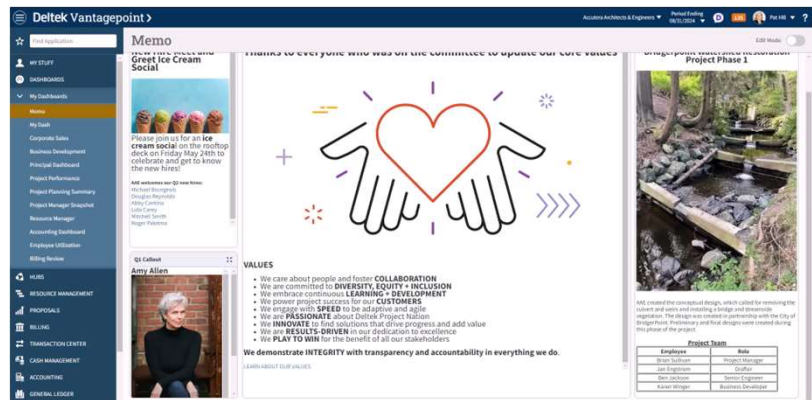
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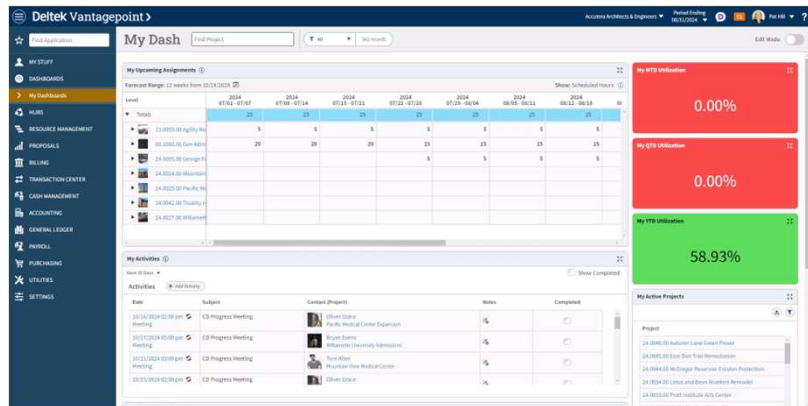
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# Intelligent Exploration

- » Leverage the data that is a byproduct of your project management processes to do work for you
- » Replace the need to know where to find information and how to configure and run reports
- » Put the information at your fingertips in a natural language way



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# Exploration to Implementation



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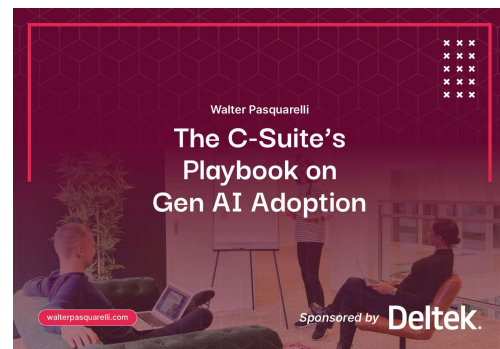


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## Structuring AI for Real Results

- » **What is it?**
  - » A strategic guide and self-assessment tool that helps C-Suite leaders align AI with their business goals.
- » **Who Authored It?**
  - » Walter Pasquarelli, tech and AI expert and evangelist.
- » **How does it work?**
  - » The playbook breaks down AI adoption into five critical pillars.
- » **Includes a Self-Assessment Tool**
  - » The playbook provides a structured self-assessment, allowing leaders to pinpoint gaps, prioritize areas for improvement, and build a roadmap for AI-driven transformation.



**Get Your  
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## Structuring AI for Real Results



- » **Start with Purpose:** Align AI initiatives to real business challenges, not just shiny tools.
- » **Focus on Foundations:** Strategy, data, governance, and culture matter more than any single technology.
- » **Prioritize Pragmatic Wins:** Target use cases that create immediate value and build momentum.
- » **Think Long-Term:** AI is a journey, not a project, lay the groundwork for continuous evolution.
- » **Empower People:** Technology succeeds when your teams are ready, curious, and supported.

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## Pillar: Strategy & Scope

*Firms that adopt AI without aligning it to strategy often waste time and miss real value. This pillar is about identifying what matters most and linking AI to business goals.*

### Key Principles and Considerations:

- » **Align to Business Goals** — Every AI initiative should tie directly to a strategic objective (efficiency, growth, innovation).
- » **Prioritize Practical Use Cases** — Start where AI can deliver quick, meaningful wins (e.g., automate reports, improve forecasting).
- » **Define Scope Clearly** — Avoid trying to overhaul everything at once—pilot specific projects.
- » **Champion Outcome Over Technology** — Focus on the problem to solve, not the tool to use.
- » **Accept Iteration** — Strategy will evolve; be ready to learn and adjust based on early results.

### Call to Action

- ✓ Identify 1-2 internal challenges (e.g., proposal generation).
- ✓ Start with “internal-first” use cases before expanding to client-facing.
- ✓ Have a 30-minute leadership brainstorm to list all recurring headaches in operations—circle one and find an AI tool to test.

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## Pillar: Infrastructure and Integration

### Call to Action

- ✓ Assign someone to catalog relevant data sources currently in use throughout firm.
- ✓ Audit your tools—what AI is already built in (e.g., MS Copilot, Deltek AI features).
- ✓ Partner with a vendor for cloud, storage, or data prep needs.

*AI is only as good as your data and systems. Many firms overlook data cleanliness and workforce readiness.*

### Key Principles and Considerations:

- » **Audit Existing Capabilities First** — Find out what AI capabilities already exist within your current tech stack.
- » **Ensure Data Accessibility and Quality** — AI is only as good as the data it draws from; start cleaning and structuring data now.
- » **Think Modular and Scalable** — Choose solutions that can grow as your firm's AI needs mature.
- » **Leverage Cloud & Open APIs** — Flexibility is key; cloud platforms and APIs enable faster integration.
- » **Partner, Don't Build from Scratch** — Small and mid-sized firms should prioritize plug-and-play tools, not massive custom builds.

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## Pillar: Compliance & Governance

*Trust is foundational. If your team or clients don't trust your AI practices, adoption will stall—or worse, create risk.*

### Key Principles and Considerations:

- » **Create Accountability Roles** — Designate a responsible person or team for AI governance oversight.
- » **Emphasize Human Review** — No AI output should go client-facing without human validation.
- » **Monitor for Bias and Risk** — Regularly audit AI outputs for fairness, legality, and brand alignment.
- » **Plan for Evolving Regulations** — Stay agile laws around AI are still forming and your policies will need to adapt.

### Call to Action

- ✓ Ask the question – “Have we defined responsible use of AI and made it clear to the team?”
- ✓ Create a simple “AI Use Policy” (what’s OK, what’s not).
- ✓ Assign an “AI steward” for compliance tracking.

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### Call to Action

- ✓ Choose one pilot AI use case (e.g., automated meeting notes) and track time saved each week.
- ✓ Recommend quarterly reviews of AI experiments

## Pillar: Monitoring & Evaluation

*Without KPIs, AI tools become gimmicks. Measuring value ensures continuous improvement and buy-in.*

**Key Principles and Considerations:**

- » **Set Clear Success Metrics Early** — Examples: time saved, errors reduced, client response time improved.
- » **Track Both Quantitative and Qualitative Value** — Productivity is measurable, but team morale and client trust matter too.
- » **Pilot, Measure, Scale** — Start small, prove value, expand.
- » **Commit to Ongoing Learning** — AI models and tools improve; your evaluation framework must evolve with them.
- » **Celebrate and Publicize Wins Internally** — Build positive momentum by sharing success stories.

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## Pillar: Culture

*Culture either accelerates or blocks AI adoption. Your team needs permission to experiment, fail, and learn.*

**Key Principles and Considerations:**

- » **Normalize Experimentation** — Create a safe space to try, fail, and learn.
- » **Upskill Everyone, Not Just Tech Staff** — AI literacy should be baseline knowledge across all roles.
- » **Lead by Example** — Leadership should be visibly curious and willing to use AI tools.
- » **Recognize and Reward Early Adopters** — Celebrate team members who experiment with and champion AI initiatives.
- » **Frame AI as an Empowerment Tool** — Continuously message that AI enhances—not replaces—human creativity and judgment.

### Call to Action

- ✓ Host AI Exploration Days or “Prompt Jams.”
- ✓ Create internal champions or an AI working group.
- ✓ Ask each team to try one AI tool this month and share learnings in a 10-minute “AI moment” at the next staff meeting.

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## How Does the Assessment Work?

- » This assessment is designed to help organizations evaluate their readiness for adopting Gen AI.
- » It asks 20 targeted questions
- » Each question offers five possible responses, representing different stages of readiness.
- » Each response is assigned a score from 0 to 4, reflecting the organization's level of progress.

Strategy and scope					
Number	Question	Not considering	Considering	Developing	Extensive
1	Does your organization understand how Gen AI could create new competitive advantages and business value (e.g., through cost savings/efficiency, operational speed/quality, improved stakeholder/customer experiences)?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	Has the organization created specific Gen AI use cases and/or Gen AI-based business models aligned to strategy, and is it able to validate targeted value?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	Have key stakeholders been involved with Gen AI goal-setting and strategy alignment (e.g., President/CEO, CIO/technology leader, data management/analytics leaders, consultant/client-facing employees)?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	Has the organization established criteria for evaluating and choosing potential Gen AI solution vendors?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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## Your AI Moment is Now

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# Your AI Moment is Now



*You don't need to master AI to benefit from it. You just need to start.*

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## Summary

- Recognize how AI can streamline project management by automating routine tasks and improving workflows
- Explore internal use cases where AI can create immediate value and build momentum
- Equip project managers with tools to enhance forecasting, collaboration, and project outcomes
- Align AI initiatives with strategic business goals to ensure measurable impact
- Understand the importance of organizational readiness, including culture, governance, and infrastructure



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# QUESTIONS AND DISCUSSION

**How Generative AI Can Streamline Processes and Boost Productivity in Engineering Firms**

**SURVEY LINK**



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