

Path to Principal

for Non-technical Professionals

Leah Boltz, FSMPS, CPSM & Adam Kilbourne, FSMPS, CPSM



Leah Boltz and Adam Kilbourne interviewed 14 non-technical principals and asked them to share their lessons learned and career journeys.

What did you want to be when you grew up? If you are like most of us, you didn't grow up wanting to be an A/E/C marketer or business developer. And you're in the minority if you dreamed of one day owning a professional services firm.

A/E/C firm principals have traditionally been technical staff who have been promoted to management and leadership positions. (For purposes of this article, technical staff refers to architects, engineers, or construction managers; and principal refers to an executive leader with ownership in the firm). It is rare for a non-technical person to be invited into ownership. Though some firms have become more progressive by inviting marketing, HR and finance professionals into the C-suite and ownership, the percentage is still small. SMPS members represent about 4000 companies in the A/E/C industries, only 7.5% have non-technical principals.

Our goal is to show marketing and business development professionals in our industry that this path exists, that we can pursue executive leadership and ownership in our firms, and that we are well-suited for these roles. We want to help more people get on the path to principal, become firm leaders, and transform business through marketing leadership.

To further this goal, we interviewed 14 non-technical principals from around the country to learn about their journeys, inspiration, what they've learned along the way, and advice to help others get started. The path to principal varied greatly among those interviewed. Like you, our esteemed panel of principals' childhood dreams were to be artists, basketball players, ad agency execs, attorneys, teachers or just be in charge, but no mention of professional services executive.

We've selected a few common themes from our interviews to share that help shed some light on being a principal, but first, learn about our own journeys.

Our Paths:

Adam Kilbourne, FSMPS, CPSM

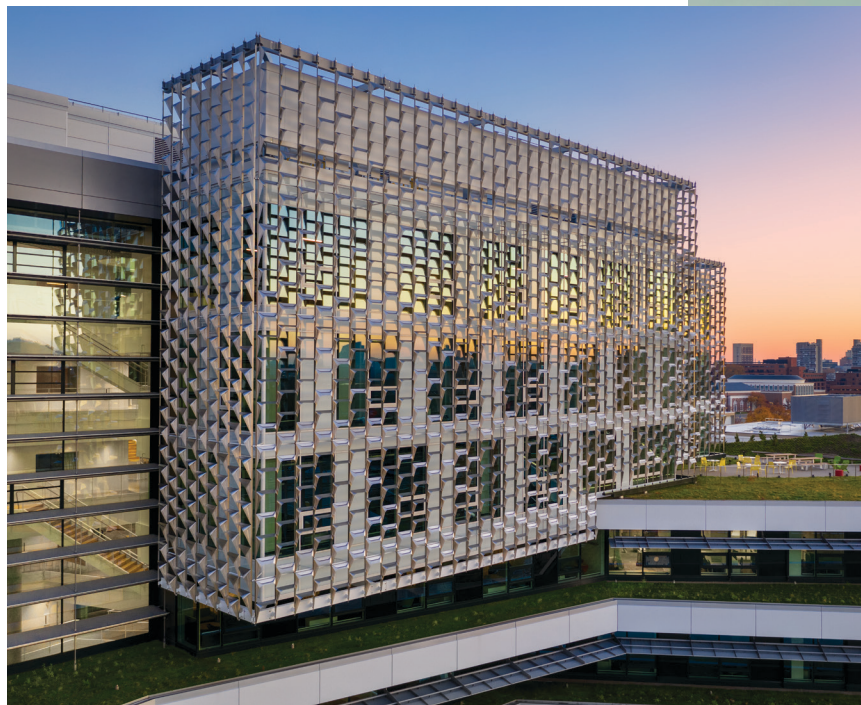
My path started like others but ended up unique among this group. I gained leadership and management experience in high school and college working at the city pools as a pool manager and director of the swim lesson program. I graduated from Texas A&M University at Galveston with a degree in marine biology, gaining additional leadership through student activities programs. I worked a couple years as the aquatic director at a YMCA, then moved back home and started working at Tec, the firm my father founded. I started by taking over the IT responsibilities, which lead me into marketing. As the firm developed a succession plan, my role was shifted to business operations. I learned more about finances, HR, and other aspects of running a business. In 2020 I became president of the firm.

Leah Boltz, FSMPS, CPSM

I wish I had noticed all those small clues telling me I'd end up on this path. For example, my appreciation for architecture led me to be the first student at my school to try to model a set of house plans in 3D. But the A/E/C industry was never promoted as a career opportunity (Perhaps because I was terrible at the actual drawing part!). In school, I was torn between writing and science, thinking my only career potential was to write science textbooks or work in a lab. I started college in Montana on a science and engineering scholarship to study chemistry, with a minor in writing. After discovering the lab wasn't for me, I switched majors to marketing, moved to Alaska, and eventually graduated from the University of Alaska Anchorage with a degree in journalism and public communications with minors in business and writing.

Like others, I fell into the A/E/C industry, as it offered me a stable career and a chance to pursue my love for writing, communications, and community. I started as marketing director for a local engineering firm, and eventually pursued an interest in business development and strategic planning when I came to Bettisworth North. I took a brief hiatus in 2016 to push myself out of my comfort zone and transfer my unique B2B skillset to the tech industry, but after being laid off two years later, I knew I was ready to come back to Bettisworth North and go all in as a partner at the firm. I'm proud of the fact that I'm the first non-technical owner of our firm and one of only a few non-technical A/E/C principals in Alaska. Now I want to help others find their own paths to marketing and firm leadership.

Science and Engineering Complex (SEC), Harvard University, Boston, MA, Behnisch Architekten. © Brad Feinknopf, feinknopf.com.



We appreciate the principals who gave their time for this topic, though we didn't have space to include everyone in the article. Please check out their full video interviews at www.pathtoprincipal.com

Tim Barrick, FSMPS

Partner and Director of Business Development at RATIO in Indianapolis, IN

Jana Brickey, CPSM

Business Development Principal at DFDG Architecture in Phoenix, AZ

Robin Broder, CPSM

CMO at Henderson Engineers in Lenexa, KS

Greene Celuch

CEO of Concord General Contracting in Mesa, AZ

Katelin Etoh

Partner at Ziger|Snead Architects in Baltimore, MD

Joy Guinn, FSMPS, CPSM

Principal at Guinn Consulting in Reno, NV

Katy Konik, CPSM

Principal, Marketing Director at Entellus in Phoenix, AZ

Liana Lake

Principal, Director of Marketing and Business Development for Arkinetics in Cleveland, OH

Catherine McCullough, FSMPS, CPSM

President/CEO/CMO of McCullough Landscape Architecture, Inc. in San Diego, CA

Carole Sanderson

CFO & Owner at ONYX Creative in Cleveland, OH

Kirsten Sibilja

Managing Partner at Dattner Architects in New York, NY

Andrea Story, FSMPS, CPSM

Vice President, Marketing and Business Development at R&M Consultants, Inc. in Anchorage, AK

Benefits of Non-technical Owners to a Company

Robin Broder I have always said that the more diverse a leadership team is, the more things they can accomplish. When I started in the industry I had people actually ask me "What business do you have in this room? You're in marketing, you're not an engineer or a construction manager." My response, "What does being an engineer or a construction PM have to do with running a business? What do you know about running a business that I don't know or couldn't learn?"

We want people on the leadership team that can think about all areas of our business because they all need to work together to keep the company running. Yes, we need people who know engineering and have an engineering background, because that's the product we sell, but not necessarily how we make money or how we hire people or how we market our business.

Several principals also noted the significant benefits non-technical principals bring to our clients; unique communications skills, strategy, and visionary thinking that helps build relationships, along with being the steadfast client advocate and champion.

Considerations of Becoming an Owner

Liana Lake When I was considering becoming a partner, one of the first things I did was meet with the other partners. Obviously, the managing partner and I had been talking for months about this possibility, but I wanted to make sure that the other two partners were on board as well. I asked them what changed for them when they became partners, what made them decide to become partners, and were they even comfortable with me being their partner. Did they trust me? I had a lot of questions. It was a big decision. On top of that, you have the financial risks to consider.

When considering ownership ask about the succession plan for the firm. Firms with a plan will have a path for future owners. The earlier you can understand the path, the better prepared you can be when the time is right.

Considerations of Being an Owner

Financial considerations were at the top of the list. Ownership requires an investment in the firm, and that comes with risk. Firms vary with the amount of investment and the method of payment. The investment is likely thousands, or tens of thousands of dollars. Many firms require a lump sum payment, while others may allow a multi-year payment plan. In the best situation you will retire with more than you invested, but with any firm there is a risk of losing some or all your investment.

Responsibilities of Owners

In a recent presentation, SMPS Past President Craig Galati, FSMPS, CPSM, FAIA, shared that "Leadership is not a destination or an arrival; leadership is a journey." Becoming owners and principals marks the start of our journey and a new path, where most of us take on new roles, learn new skills, and discover new talents and passions.

Once you become an owner, your responsibilities will vary depending on company size, longevity with the firm and personal interests or aptitudes. Principals in smaller firms tend to take on a broader range of responsibilities, from strategic planning to changing the light bulbs. Large firm principals tend to focus on one or two areas such as marketing and culture, finance, strategy, or human resources, distributing the responsibilities amongst the firm's principals.

Robin Broder (large firm) My primary responsibility as the chief marketing officer is to establish all marketing, business development, and sales strategies for the firm. I have a team

that leads project pursuits and they're all aligned by vertical market. I also have a whole group of proactive communications professionals from PR specialists to social media to graphic designers to web designers that are in charge of brand awareness and getting the word out about Henderson. I'm also responsible for setting business development goals for our seller doers. Determining how we hold them accountable; how often they should meet with clients, that sort of thing. It's all in my purview as a department head.

In addition to all of that, I was recently asked to be the project manager of our firm's strategic planning process. In the past this role was filled by our CEO or CFO, and we'd hire outside facilitators, but now it's a big piece of my role. Setting business strategy for the firm and making it run, not just marketing and sales strategy. These are my primary responsibilities, but we also handle a lot of our internal culture building making employee engagement is a huge part of the department.

Andrea Story (medium firm) I'm responsible for several business functions, starting with all marketing and business development throughout the office. I also supervise our front desk staff, which includes our office services manager, so anything to do with the building or the grounds maintenance falls under me. As a director, I'm involved with a lot of the financial decisions, annual wage reviews, and bonus allocations. We sit through the presentations with our accountant who does our taxes every year and hear about our audit for overhead. We're an efficient overhead firm and pride ourselves on that. The only thing that I'm not really involved with right now is contract management, but it's something I'm interested in and hope, over the next few years, to start learning more. In the past, I've even been in charge of HR, and I'm happy to say we just hired our first HR person.

Katelin Etoh (small firm) We are a small firm competing at what I'd



Science and Engineering Complex (SEC), Harvard University, Boston, MA, Behnisch Architekten. © Brad Feinknopf, feinknopf.com.

like to think is a high level in an ever-changing environment, so I wear a lot of hats. My role includes marketing strategy and oversight of proposals and communications, along with development of our project teams. That and managing our staffing and operations, it's really working to connect that business development strategy with what will best set the project up for success. I decide our scope definition for proposals including the fee on contract negotiations, and I work with our team on back-of-house stuff, like management of our insurance vendor relationships, accounting, bookkeeping, and billing.

Maybe the least defined but most important and, in some ways, most consuming is the team dynamics; how to strengthen the culture, how to move our processes forward and how that relates to the little things and the big things in our office. I joke that I do everything but the architecture, though I do sometimes have a bit of a role in the early project visioning and positioning.

Liana Lake (small firm) Before becoming a principal I worked in a marketing silo and now I'm doing things that I'd never even considered or imagined myself doing, like writing procedures and coming up with processes that will help the company run better as a whole. Worrying about our lease running out and having to find space, deciding whether to renew or to look for a new office. These are all issues that weren't my problem until now. Legal issues and all of that, it's very eye-opening.



Leadership is not a destination or an arrival; leadership is a journey."

— Craig Galati, FSMPS, CPSM, FAIA



Story Behind the Picture
The new 56,000 sf LEED Gold District Energy Facility (DEF) sets the stage for a state-of-the-art, cost effective, and sustainable utility generation and distribution system for Harvard's Allston campus that also makes a significant contribution to its urban design.

District Energy Facility (DEF),
Harvard University, Boston, MA,
Leers Weinzapfel Associates.
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Challenges of Being an Owner

Kirsten Sibilia The biggest challenge for me as an owner is that my position needs to be equally effective in both knowing week to week that the firm is running as it should while also looking out for the firm strategically. Where are the markets going? What are trends in terms of employee engagement? What are the big picture, strategic things that we need to be working on now that might not fall into place for two, three, five, 10 years? Really carving out the time to make sure that I'm really looking far enough ahead and proactively bringing things up so we can address them and navigate them well in advance of when they might otherwise affect the company. I wish I had that part, I'm not there yet.

Rewards of Being an Owner

Catherine McCullough I think the biggest reward of being an owner is the flexibility that you have. Being your own boss and being able to make the decision to go to my daughter's cheerleading competition, but know I am going to work [later] to make up the difference. It may be off-hours, but I'm going to get the work done on my own terms. That has been a huge benefit; having the flexibility to work my own hours.

Liana Lake The biggest reward to being an owner, especially externally, is that it gives you a little more clout. I have skin in the game. When I'm talking to clients and prospects and out networking at conferences, I'm not just selling our company because it's my job, I'm selling a company that I believe in, that I've invested in. That connection is more meaningful to the external network.

Tim Barrick Well, I'm sure you know folks who aren't partners in their firms that think the financial reward is the biggest reward, and I'm not going to suggest that it isn't. It's wonderful to invest in a business and see the fruits of your work and in your risk. But the thing that I think I value most is the building of the business. The reward for me is remembering when we were a small company and now, we're growing. We're involved in mergers and acquisitions, and we intend to grow the firm beyond what we are today. If you ask me when I joined the firm would we be where we are today, I had no clue—but to look back and see where we've been and where we are today, that's it for me. That's a lot of fun. Also, all of the people that I've worked with at RATIO along the way. Some are still with us, some have moved on to other endeavors, but it's been wonderful. ■

Watch the full interviews
and download the Path to
Principal workbook at
www.pathtoprincipal.com