

Exclusively
for the
AEC Industry



EFCG

Technology Leadership Conference Agenda

June 15-16, 2026 | Convene Willis Tower



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ABOUT EFCG

EFCG is a global specialized M&A advisor and management consultant to architecture, engineering, and consulting (AEC) firms. Our mission is to provide a strategic edge to AEC firms to advance the industry through our end-to-end, integrated solutions that support executive leaders with their most critical strategic and financial decisions.

For 35+ years and counting, we have served as a retained advisor to 550+ firms, developed an extensive proprietary database of financial and business metrics from our clients, held more than 125 executive conferences, and advised on 250+ M&A transactions. The relationships we have formed with the executive teams at every major AEC firm make us a valued and trusted advisor.

Management Consulting



- Strategic Planning
- Corporate Financial Benchmarking
- Valuations
- Talent & Compensation
- Technology & Innovation
- Sustainability & ESG

Mergers & Acquisitions



- Sell- & Buy-Side Assignments
- Capital Structure Analysis
- Corporate Divestitures & Tech Spinouts
- Strategic & Private Equity Partner Engagement
- Integration Planning
- Due Diligence & Market Studies

Executive Conferences



- Analysis on AEC Trends from EFCG's Proprietary Industry Database
- Perspectives from Subject Matter Experts and Industry Executives
- Invaluable Peer-Networking Opportunities

Advanced Data Analytics & Insights

EFCG has developed a comprehensive proprietary database exclusively for the industry

6
Annual Surveys

8M+
Data Points Every Year

500+
Database Contributing Firms

Photography & Press

Recordings and images from the event may be used for live or on-demand sessions, EFCG materials, or by other participating firms in their own promotions. If you prefer not to be recorded or photographed, please let EFCG know in writing at efcg@efcg.com. Press may publish articles on the event and its sessions.

WELCOME



TECHNOLOGY LEADERSHIP CONFERENCE

June 15-16, 2026

ABOUT EFCG'S TECHNOLOGY LEADERSHIP CONFERENCE

With AI now emerging as one of the most transformative technologies of our time, there has never been a better moment for AEC firms to reimagine how they can turn these disruptions into opportunities. To bring fresh ideas to our AEC clients, this conference will delve into industry trends impacting technology leaders and the associated business and financial implications.

ABOUT OUR SPONSORSHIP PARTNERS



Dell Technologies Client Product Group delivers solutions for the engineering industry to run the most demanding workflows in CAD, simulation, visualization, reality capture, and AI. Today, Dell Pro Max and Precision Workstations with NVIDIA RTX PRO GPUs and Grace Blackwell AI superchips are providing important compute platforms for emerging agentic AI coworking to run locally, helping leaders navigate a rapidly changing technology landscape. Visit www.dell.com.



Egnyte combines the power of cloud content management, data security, and AI into one intelligent content platform. More than 22,000 customers trust Egnyte to improve employee productivity, automate business processes, and safeguard critical data, in addition to offering specialized content intelligence and automation solutions across industries, including architecture, engineering, construction, life sciences, and financial services. Visit www.egnyte.com.



Microsoft's leading Dynamics™ 365-based solution for the AEC industry, HSO's aec360, is a cloud-based business platform designed to meet the unique needs of architecture, engineering, and construction firms. aec360 provides an integrated industry solution for marketing and business development, project management, accounting, and human resource management, and was built to leverage the best of the Microsoft cloud, helping AEC firms drive productivity, collaboration, and insights across their organization. Visit www.aec360.com.

(All Times in Central Time)

Monday, June 15, 2026

2:00 pm – 2:45 pm
Jackson Gallery

Welcome Coffee Reception and Check-In

2:45 pm – 3:00 pm
The Hub

Event Welcome and Introductory Remarks

3:00 pm – 3:45 pm
The Hub

Session 1: Tech State of the Industry Part 1: Where Are We Now and Where Are We Headed

Technology is no longer a support function in AEC; it is becoming a central determinant of competitiveness, growth, margin expansion, and client value. This opening session will frame where the industry stands today across AI, automation, applied technology, digital delivery, and enterprise systems, while separating hype from durable shifts. Attendees will leave with a shared baseline for the conference: what is changing, what is accelerating, and where technology leaders should focus their attention over the next 12–36 months.

Presenter: Marcus Quigley, EFCG Partner, Technology & Innovation

4:00 pm – 4:45 pm
The Hub

Session 2: The New CTO Mandate: Strategy, Transformation, and Business Value

The CTO/CIO role in AEC is expanding from infrastructure, systems, and cybersecurity into firmwide strategy, innovation, data, AI, productivity, and growth. This session explores the new mandate for technology leaders: translating technical capability into measurable business value, aligning with CEOs and boards, and building the operating model required to move from pilots to enterprise-scale transformation.

Moderator: Jay Margherio, EFCG Vice President, Technology & Innovation

Panelists:

Kat Nelson Galke, Head of AI Innovation & Strategy, Trilon Group
J Nick Otto, Chief Technology Officer, Kimley Horn
Justin Webster, Chief Technology Officer, HDR
Greg Wolterstorff, Chief Technology & Innovation Officer, V3

5:00 pm – 5:30 pm
The Hub

Session 3: Leading in Times of Change

The pace of technology change is forcing firms to make decisions under uncertainty: invest too slowly and risk falling behind; invest too aggressively and risk misallocating scarce capital and talent. This session will focus on how technology leaders guide organizations through ambiguity, build confidence among skeptical stakeholders, and create momentum without overpromising what technology can deliver.

Moderator: Julie Hasiba, EFCG Managing Partner, Talent & Compensation

Panelists:

Jon Brownstein, Ph.D., Executive VP, Chief Transformation Officer, Weston Solutions
Adil Mansoor, Head of Finance - Ventures, IP, & Digital Products, Arup

5:30 pm – 7:00 pm
Franklin Gallery

Conference Welcome Reception and Dinner



Join us for an evening of food, drinks, and conversation, with the chance to connect with peers and the EFCG team as we settle into what promises to be a memorable event.

(All Times in Central Time)

Tuesday, June 16, 2026

8:00 am – 8:30 am

Franklin Gallery

Breakfast Meet-and-Greet

8:30 am – 8:45 am

The Hub

Introductory Remarks

8:45 am – 9:10 am

The Hub

Session 4: Tech State of the Industry Part 2: The Pace of Change

Part 2 will shift from “where we are” to “how fast the ground is moving.” AI, automation, digital delivery, and data-enabled services are advancing faster than traditional planning cycles can comfortably absorb. This session will examine the implications of compressed innovation cycles: how often firms need to revisit assumptions, which capabilities are becoming obsolete faster than expected, and how leaders can build tech strategies that remain adaptive as the market evolves.

Presenter: Marcus Quigley, EFCG Partner, Technology & Innovation

9:10 am – 9:30 am

The Hub

Session 5: Keynote: A Fireside Chat at the Front Edge of AI with NVIDIA

Few organizations have a closer view of where artificial intelligence is heading than NVIDIA. In this keynote conversation, Sean Young, Head of AEC of NVIDIA, brings a front-row perspective on the architectures and capability shifts driving the next wave of AI. This candid fireside format invites an unscripted exchange on enterprise AI adoption, near-term opportunities, and how to engage leadership teams in grounded conversations about AI investment. Together, Sean and Marcus will explore what technology leaders in AEC firms need to understand right now.

Moderator: Marcus Quigley, EFCG Partner, Technology & Innovation

Keynote: Sean Young, Head of AEC, NVIDIA

9:30 am – 10:00 am

Franklin Gallery

Morning Coffee Social

10:00 am – 10:45 am

The Hub

Session 6: EFCG AEC Industry Overview

This session will ground the technology conversation in the broader AEC business context. EFCG will review the financial, operational, labor, growth, and M&A dynamics shaping the industry, then connect those trends to the technology agenda. The goal is to underline the realities of why technology investment is becoming central to firm strategy, margin resilience, client differentiation, and long-term value.

Presenter: Julie Hasiba, EFCG Managing Partner, Talent & Compensation

11:00 am – 11:45 am

The Hub

Session 7: From Data to Value: Building Enterprise Foundations for Growth

Data is becoming one of the most significant strategic assets in AEC, yet most firms are still working against themselves. For firms in growth mode especially, fragmented systems, inconsistent taxonomies, and project knowledge trapped in inboxes are more than an inconvenience, they are a ceiling. This session focuses on how firms can build the foundations for a real data and knowledge management strategy, and what it looks like when those foundations start generating returns in productivity and growth.

Moderator: Jay Margherio, EFCG Vice President, Technology & Innovation

Panelists:

Brent Hamlin, Infrastructure Manager, Parametrix

Jacob Lindsay, Head of Technology & Innovation, Senversa

Mike Soldan, SVP, Global Technical Solutions, EgnYTE

(All Times in Central Time)

Tuesday, June 16, 2026

11:45 am – 12:30 pm
Franklin Gallery

Lunch

12:30 pm – 1:00 pm
The Hub

Session 8: When Technology Drives the Deal: M&A Valuation Premiums and Post-Merger Integration Implications

Technology is increasingly influencing how AEC firms are valued, acquired, integrated, and positioned for growth. Buyers are looking beyond traditional financial performance metrics to assess digital capabilities, proprietary workflows, recurring revenue potential, data assets, automation maturity, and scalability. This session will examine both sides of the equation from what makes technology a source of valuation premium to what makes it a liability when a deal closes.

Moderator: Jessica Zofnass Barclay, EFCG Managing Partner, M&A

Panelists:

Kenna Fraser, EVP, Chief Corporate Services Officer, Stantec
 Claire L. Rutkowski, Executive Director, AI Productivity and Enablement, WSP
 Keith Zecchini, Chief Technology and Innovation Officer, Apex

1:00 pm – 1:20 pm
The Hub

Session 9: Turning Your Firm’s Untapped Intelligence Into a Strategic Asset with HSO

Most AEC firms are sitting on a wealth of intelligence they've never been able to use, captured in documents, emails, meeting notes, proposals, and reports, but buried in formats that systems can't read and people don't have time to search. Building on Session 7, this fireside conversation with HSO will explore how the industry's most forward-thinking firms are transforming unstructured data into a strategic asset, surfacing insights that sharpen decisions, accelerate delivery, and reveal patterns that would otherwise go unnoticed. The opportunity isn't just operational — it's a fundamental shift in how firms understand themselves.

Moderator: Julie Hasiba, EFCG Managing Partner, Talent & Compensation

Panelists:

Asad Mahmood, Vice President, Data & AI, HSO
 Neil Holmes, AEC Market Lead, HSO

1:30 pm – 2:00 pm
The Hub

Session 10: The Hidden Networks Inside Your Organization

Every organization has a formal structure, and then there is how work actually gets done. The real networks of communication, collaboration, and influence that shape performance are often invisible to leadership, yet they drive integration, innovation, and risk. In this session, EFCG will introduce its Organizational Network Analysis (ONA) methodology, which maps these hidden connections to reveal where knowledge flows freely, where bottlenecks form, and where critical expertise is concentrated. See how these networks can be measured to support better decisions around team design, post-merger integration, and succession planning.

Presenter: Shi Qi Connolly, EFCG Senior Analyst, Technology & Innovation



Photograph provided by LocalWiki

About the Chicago Willis Tower (formerly the Sears Tower)

Convene Willis Tower is in one of the most iconic buildings in the world. It spans 90,000 square-feet across the entire third floor and features park-like design elements, 24-foot floor-to-ceiling windows, and five private outdoor terraces.

(All Times in Central Time)

Tuesday, June 16, 2026

2:00 pm – 2:45 pm
The Hub

Session 11: Leading Workforce Transformation Through AI and Automation

AI and automation are changing how work gets done across AEC, from proposals and project management to design production, QA/QC, reporting, knowledge retrieval, and client communication. This session will explore how leaders can prepare the workforce for that shift by redesigning workflows, reskilling teams, building confidence, changing incentives, and ensuring that productivity gains translate into better client outcomes rather than simply more pressure on staff.

Moderator: Jay Margherio, EFCG Vice President, Technology & Innovation

Panelists:

Erin Atkinson, SVP, Technology, Half
Chris B. Bosco, AI Strategic Initiative Leader, Freese & Nichols
Rashaad Sader, Chief Technology Officer, Consertus

3:00 pm – 3:45 pm
The Hub

Session 12: Citizen Development at Scale: Unlocking Innovation Without Losing Control

Low-code, no-code, AI copilots, and automation tools are putting technology creation into the hands of employees. For AEC firms, this creates enormous potential for faster workflow improvements, more localized innovation, and reduced dependence on centralized IT teams. But citizen development also introduces risks around security, data quality, duplication, maintainability, and governance. This session will explore how firms can unlock grassroots innovation while maintaining enterprise control.

Moderator: Marcus Quigley, EFCG Partner, Technology & Innovation

Panelists:

Jaime Kurten, Director, Applied Technology and Innovation, MSA
Dave Roberts, Chief Digital Officer, Stantec
John Shelbourne, Director, Applied Technology, Olsson

4:00 pm – 4:45 pm
The Hub

Session 13: The Modern Tech Team by Design: Built for Scale, Speed, and Impact

AEC firms are rethinking the design of their technology teams as both the purpose of and opportunity for the technology function shifts. These teams now oversee everything from IT and cybersecurity to client-facing solutions, and, often, with limited resources behind them. This session will explore how leading firms are designing technology teams that can scale adoption, move faster, and demonstrate measurable business impact.

Moderator: Shi Qi Connolly, EFCG Senior Analyst, Technology & Innovation

Panelists:

Klint Fletcher, Director, Digital Solutions, Brown and Caldwell
Jay Hatho, Chief Information Officer / Chief Technology Officer, SCS Engineers
Sujan Turlapaty, Chief Digital & Information Officer, Verdantas

4:45 pm – 5:00 pm
The Hub

The Day's Closing Remarks

5:00 pm – 6:30 pm
Franklin Gallery

Evening Networking Reception



Join us for an evening networking reception designed to wrap up your conference experience with connection and community.

(All Times in Central Time)

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Visit the Conference Portal

Learn more about EFCG and the event through our online conference guide.
www.efcg.com/conference-portal/tlc