



# CVG

Your architecture firm is unique.  
Your challenges aren't.



## What CVG Does

CVG's mission is to help small and mid-sized architecture firms become better businesses.

Our team of experts morphs around your architecture firm to provide the business services and guidance you need to get to the next level of success. We roll up our sleeves to strategize, advise, and execute in the areas of:

- ✓ Leadership and Management
- ✓ Operations
- ✓ Ownership Transition
- ✓ Business Development
- ✓ Finance
- ✓ Recruiting
- ✓ Marketing
- ✓ Organizational Design

Your small architecture firm likely needs a combination of the above services. That's why CVG offers a whole systems approach, strategically applying our experience where and when it's needed. We provide an alternative to typical consulting services: CVG both directs and helps implement our recommendations. Knowing your resources are limited, CVG steps in to fill the execution gaps.

## How We Do It

We offer different service models depending on your needs. Some firms choose a long-term Investment Partnership with CVG, where we work together over a five-year contract to help you meet your goals. Other firms prefer à la carte services, such as branding or ownership transition. Or you may prefer a retainer model, where we combine services for a flat monthly fee.

However you choose to engage CVG, each relationship begins with a business assessment report where we review your financial metrics, marketing and business development efforts, operations, and culture. From here we benchmark your firm against similar firms in the industry and offer related recommendations. Our goal in providing this assessment is to deliver valuable insights and actionable recommendations. It is also an opportunity to evaluate if we're a good fit for a longer-term working relationship, and what form of relationship might work best.

It all starts with a conversation. Contact us to schedule a free, confidential business coaching session by emailing [chelsea@charrettevg.com](mailto:chelsea@charrettevg.com).



## AN INVESTMENT PARTNERSHIP WITH CVG INCLUDES:

*I'm working longer hours and just hired another staff member. Shouldn't I be making more money?*

### FINANCIAL PLANNING

#### CFO Advisory Services

CVG takes a broad view of our partners' financial goals as they relate to a firm's organizational design, and together we develop a strategic path for growth.

#### Profitability Analysis & Revenue Forecasting

After an analysis of your firm's financial statements and key performance indicators (KPIs), in combination with interviews and broad organizational understanding, we work with you to identify and reduce barriers to profitability. Revenue forecasting helps marry profitability strategies, quantifiable financial goals, and budgeting.

#### Bookkeeping & Project Management Software Advisory Services

CVG has experience with dozens of firms that use a variety of bookkeeping, time-tracking, and project management software. We understand the pros and cons of many programs designed for architectural firms.

#### Financial Literacy Education for Staff

Understanding how to read financial statements and interpret KPIs are critical skills for emerging leaders to develop. This knowledge empowers your key staff to participate in planning discussions and actively improve the overall financial health of your firm.

#### Ownership Transition Planning

CVG works with principals to plan the financial and cultural framework for ownership transitions.

### OPERATIONAL IMPROVEMENT

#### CEO Advisory Services

CVG takes a broad view of our partners' overall operations, infrastructure, and staffing, and works with CVG's Advisory CFO to develop a strategic path for growth.

*I feel like I train employees and then they leave for competing firms. How can I avoid this?*

#### StrengthsFinder Assessments and Leadership Coaching

Our trained StrengthsFinder coaching expert administers the Gallup StrengthsFinder test to employees of partner firms, then meets with key employees to help them understand their unique talents. This information is discussed with firm leadership as a means of improving team dynamics and firm culture.

#### Strategic Planning Retreat Facilitation

CVG helps develop the agenda and facilitate leadership and/or staff retreats. We focus on exercises and discussions specific to uncovering and solving the problems that growing architectural firms regularly face.

*Last time we did a retreat we came up with a lot of ideas, but nothing happened.*



## Organizational Design

The design of a firm's organizational structure not only affects profitability and efficiency, it also creates pathways for emerging leaders to assume greater responsibility and can facilitate smoother ownership transitions. CVG has experience with many types of organizational structures and uses this knowledge to help guide firms toward their most effective internal structure.

## Staffing Planning and Recruitment

In conjunction with financial planning, CVG advises firms on when to consider hiring new employees. We perform national recruitment searches, vet prospects, and screen references prior to arranging a final interview with firm leadership. Additionally, we assist with salary and benefit negotiations.

## MARKETING

### CMO Advisory Services

CVG takes a broad view of our partners' strategic marketing efforts and resources, assessing critical factors that influence the type, quality, and quantity of projects coming through the door.

*My clients don't want to pay for good design. I'm tired of competing on fee.*

### Marketing Planning

A thoughtful marketing strategy requires a realistic tactical plan to be successful. CVG builds individual marketing plans with all of our partners to identify opportunities and deadlines for awards, press, digital media, speaking engagements, proposals, etc. This enables us to allocate resources effectively and avoid the "fire drills" that come with surprise deadlines.

*We're thinking about renaming our firm, but what about the people who already know us?*

### Messaging

CVG conducts brand audits and messaging assessments to help refine our partners' mission, vision, and value proposition statements. We write firm profiles and develop language that can be used across marketing collateral to describe our partner's key differentiators, offerings, and culture. Throughout this process we focus on keeping all communications aligned towards building an authentic brand.

### Thought Leadership

Our marketing team helps partners identify opportunities to showcase their unique industry knowledge. This can take the form of writing case studies or blog posts, or even finding conferences or speaking venues to approach with presentation ideas.

### Social Media

Many of our partners recognize the value of social media, but struggle with consistency and content when creating their own posts. Our digital content expert specializes in telling your story through compelling customized content, tagging relevant people/organizations to drive engagement, and delivering these posts using various platforms.

*My staff wants us to be on social media, but I just can't see the ROI.*



### Targeted Eblasts

CVG's digital content expert interviews our partners and uses that information to write informative blog posts and articles that can be distributed through email blasts. Using drip campaigns, CVG is able to segment our clients' databases to reflect their interests and ensure that they receive valuable content on a regular basis. Each message includes a "call to action" to encourage further engagement.

*We send eblasts to our mailing list, but nobody opens them.*

## BUSINESS DEVELOPMENT

### Business Development Coaching

Marketing efforts generate leads, and business development efforts convert leads to clients. CVG works with architectural firm leaders to develop a comprehensive business development strategy and put systems in place to facilitate its success.

### Interview Preparation and Proposal Review

CVG's business development expert helps our partners prepare for important interviews using various techniques including role playing. Additionally, we critically review important proposals to ensure clear messaging and alignment with the clients' perceived needs.

### Lead Prospecting

Our marketing and administrative teams work with our partners to build lists of potential leads in specific markets. The prospecting exercise can be as simple as locating names and emails, or as thorough as researching opportunities within market sectors.

*The big firms get all the institutional clients. How can I even get a foot in the door?*

### CRM Software Advisory Services

CVG believes that using a CRM database is critical to developing successful business development habits. We get firms up and running on CRM platforms such as Hubspot.

*I'm so busy, I don't have time for business development.*

*These are the types of questions that CVG answers every day. Small and mid-sized design firms have much different challenges than larger firms or sole proprietors. Our goal is to guide you in the growth and improved health of your business.*



## THE CVG TEAM

CVG's unique structure enables us to retain industry leaders from across the globe to work with our partners. Our carefully selected team includes entrepreneurs, MBA's, architects, marketers, leadership coaches, graphic designers, and administrative and accounting professionals who all have experience working with small architecture firms. We've assembled these experts in response to the needs of growing small and mid-sized firms that are too small to bring these services in house, but very much in need of industry-specific business knowledge and tactical resources.



**Todd L. Reding**  
CEO & Partner  
Grinnell, IA



**Rena M. Klein, FAIA**  
Senior Partner  
Albuquerque, NM



**Emily Hall**  
President  
Detroit, MI



**Lucas Gray**  
Director of Business  
Development /  
Senior Management  
Consultant  
New York, NY



**Dena Alspach**  
Director of Marketing  
Minneapolis, MN



**Scott Butler**  
Management  
Consultant  
Doylestown, PA



**Sun Joo Kim**  
Sr. Management  
Consultant  
Portland, OR



**Erin Murphy, AIA**  
Sr. Management  
Consultant  
Arlington, VA



**Valerie Puchades**  
Director of Strategic  
Planning / Senior  
Marketing Specialist  
Canandaigua, NY



**Lisa Saldivar**  
Creative Director  
Mexico City, Mexico



**Carlos Valle**  
Art Director  
Portland, OR



**Danielle White**  
Human Resources  
Expert  
Charlotte, NC



**Hope Trory**  
Digital Content  
Expert  
Queens, NY



**Jesselyn Mobley**  
Marketing Manager  
Jacksonville, FL



**Misty Levis**  
Director of Financial  
Management and  
Human Resources  
Des Moines, IA



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## THE CVG TEAM continued



**Chelsea Swanson**  
Director of Support  
Services  
Des Moines, IA



**Sarah Rowe**  
Support Services  
Denver, CO



**Kate Kay**  
Support Services  
Denver, CO



**Ransom Ratcliff**  
Director of  
Technology Services  
Rockville, MD



**Kimberly Burgraff**  
Director, Studio Services  
Bookkeeping  
Rancho Cucamonga, CA



**Patricia Sanders**  
Studio Services  
Bookkeeping  
Dallas, TX



**Stephanie Meeks**  
Studio Services  
Bookkeeping  
Webster, NY



## WHAT OUR CLIENTS SAY:

*"It felt like the time was right to set out on my own, and I wanted to build something new. But running a business is very challenging. I knew from the start that I could not do it alone. CVG gives me a team dedicated to the success of my firm. It is a strategic advantage."*



### **BUILDINGWORK**

Matt Aalfs, Principal  
Seattle, WA  
A CVG Investment Partner

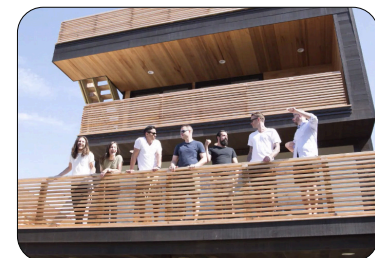
*"CVG was instrumental in helping High Plains Architects secure new work that we really wanted. In the past year we had a string of rejections for projects for which we were the most qualified candidate. CVG strategized with us on how to understand the owner's interest and how to most effectively present our skills and interest. Consequently, we were able to confidently and effectively present at the interview, even though it was a new project type for us. And we got the job!"*



### **HIGH PLAINS ARCHITECTS**

Ed Gulick, Principal  
Billings, MT  
A CVG Investment Partner

*"When new challenges or unexpected circumstances arise in our firm, there is now a new level of reassurance in knowing that we have a team of ten brilliant consultants who we can lean on for guidance."*



### **THE UP STUDIO**

Jeffrey Ramirez, Principal  
Long Island City, NY  
A CVG Investment Partner





*“We know we must constantly be improving our firm. That includes improving the way we’re running our business. The CVG partnership gives us a wide range of resources that would be difficult for us to secure in their independent categories.”*



### **HKP ARCHITECTS**

Julie Blazek, Principal  
Mt. Vernon, WA  
A CVG Investment Partner

*“When we came across CVG, we were truly surprised to find a consulting group that covered all of the items on our to-do list. It was all the more surprising that their sole focus was small architecture firms like ours, with many architecturally trained people in their group. It seemed almost too good to be true. It felt like we found a unicorn. But no, they were real, and working with them so far has been excellent.”*



### **WINDER GIBSON ARCHITECTS**

Geoff Gibson, Principal  
San Francisco, CA  
A CVG Investment Partner

*The CVG team provides the services I need to run my firm. Finding all of these resources, and affording them, would be impossible for me. They have helped me grow my business in ways I could not achieve alone.”*



### **SPRINGHOUSE ARCHITECTS**

Sheri Scott, Principal  
Dayton, OH  
A CVG Investment Partner Alum