**Original Breakout Session Team at Summit20:**

*Nicole Baden, AIA Jana Itzen, AIA;*

*Brad Benjamin, AIA Elizabeth Morgan, AIA*

*Scott Busby, AIA Sylvia Kwan, FAIA*

*Rhet Fiskness, AIA, NCARB Timothy So, AIA, LEED AP BD+C*

**Team contributing to this document:**

*Nicole Baden, AIA Jana Itzen, AIA;*

*Brad Benjamin, AIA Elizabeth Morgan, AIA*

*Scott Busby, AIA Sylvia Kwan, FAIA*

*Rhet Fiskness, AIA, NCARB Timothy So, AIA, LEED AP BD+C*

**RESOURCES**

*\*\*\* The AIA collects and disseminates the following information as a service to AIA members without endorsement or recommendation. Appropriate use of the information provided is the responsibility of the reader.*

**Books**

Overall Architecture Firm Related

1. American Institute of Architects. *The Architect’s Handbook of Professional Practice,* 14th Edition. Hoboken, NJ: Wiley & Sons, Inc., 2008.
2. Piven, FAIA, Peter and Bradford Perkins, FAIA. *Architect’s Essentials of Starting, Assessing, and Transitioning a Design Firm.* Hoboken, NJ: Wiley & Sons, Inc., 2008.
3. Rubeling, Jr., Albert. *How to Start and Operate Your Own Design Firm: A Guide for Interior Designers and Architects*, 2nd Edition. New York: Allworth Press, 2007.
4. Klein, FAIA, Rena M. *The Architect’s Guide to Small Firm Management: Making Chaos Work for Your Small Firm*. Hoboken, NJ: Wiley & Sons, Inc., 2010.
5. Cramer, James P. and Scott Simpson. *How Firms Succeed: A Field Guide to Design Management.* 2nd Edition. Atlanta: Greenway Communications, 2004.
6. Cramer, James P. and Scott Simpson. *The Next Architect: A New Twist on the Future of Design.* Atlanta: Greenway Communications, 2006.
7. Cesal, Eric J. *Down Detour Road: An Architect in Search of Practice*. Cambridge, MA: The MIT Press, 2010.

Financial Management

1. Winter, AIA, Steve L. and Michael Tardif, Assoc. AIA. *Financial Management for Design Professionals: The Path to Profitability*. Chicago: Kaplan AEC Education, 2007.
2. Mattox, FAIA, Robert F. *Standardized Accounting for Architects*. Washington DC: The American Institute of Architects, 1982.
3. ZweigWhite. A/E Financial Fitness Plan

Strategic Planning

1. Kogan, AIA, Raymond and Cara Bobchek. *Strategic Planning for Design Firms.* Chicago: Kaplan AEC Education, 2007.

General Business and Marketing

1. Maister, David H. *Managing the Professional Service Firm.* Paperback Edition. New York: Free Press, 1997.
2. Gerber, Michael E. *The E-Myth Revisited.* New York: Harper Collins, 1995.
3. Gerber, Michael E. *E-Myth Mastery.* New York: Harper Collins, 2005.

Managing Yourself

1. Covey, Stephen R. *The 7 Habits of Highly Effective People.* Revised edition. New York: Free Press, 2004.
2. Allen, David. *Getting Things Done: The Art of Stress-Free Productivity.* New York: Penguin Books, 2003.

Leadership & Human Resource Management

1. Last Name, First Name. *Title*. Location: Publisher, Year.

**Websites & Other Online Content**

Consultants for Architecture Firm Management

1. PSMJ Resources: <http://www.psmj.com/>
2. ZweigWhite: <http://www.zweigwhite.com/>
3. The Coxe Group: <http://www.coxegroup.com/>
4. Peter Piven Management Consultants <http://www.peterpiven.com/>
5. RM Klein Consulting: <http://rmklein.com/cv>
6. Professional Development Resources Inc.: <http://www.pdrinfo.com/>
7. The Greenway Group: [www.greenway.us/](http://www.greenway.us/)
8. Kogan & Company, LLC: <http://www.kogancompany.com/>
9. Management Consulting Services: <http://www.managementconsultingservices.com/>

Various Materials for Purchase

1. Design Intelligence: <http://www.di.net/>
2. IOMA: <http://www.ioma.com/>
3. PSMJ Resources: <http://www.psmj.com/>
4. ZweigWhite: <http://www.zweigwhite.com/>

**Training Seminars**

1. PSMJ Resources: <http://www.psmj.com/>
   1. *A/E/C Principals Bootcamp*
   2. *Business Development for the A/E/C Firm Seminar*
   3. *A/E/C Successful Financial Management*
   4. *A/E/C Winning Proposals and Presentations Bootcamp*
2. ZweigWhite: <http://www.zweigwhite.com/>
   1. *Principals Academy*
   2. *Marketing in Today's World*
3. Harvard Business School Executive Education
   1. *Leading Professional Service Firms* - <http://www.exed.hbs.edu/programs/lpsf/Pages/default.aspx>

News/Blogs

1. Entrepreneur Architect: <http://markrlepage.wordpress.com/>
2. Entrepreneur Architect on LinkedIn: <http://www.linkedin.com/groups?gid=2536698&trk=myg_ugrp_ovr>
3. Harvard Business Review: <http://hbr.org/>
4. mal-practice: the architecture of constructing a practice: <http://archinect.com/blog/21840762/mal-practice>
5. ZweigWhite Blog: <http://blog.zweigwhite.com/>
6. PSMJ Blog: <http://psmj.blogspot.com/>

Articles

1. *Leadership Continuity and the Future of Your Firm*, Raymond Kogan, AIA

Victor O. Schinnerer & Company, Inc. Guidelines for Improving Practice, Number 1, 2008

<http://www.kogancompany.com/master/GuidelinesNo1.pdf>

1. *Building Better Accountability Into Your Firm*, Raymond Kogan, AIA

IOMA Principal’s Report, June 2008

<http://www.kogancompany.com/master/IOMA_article_1.pdf>

1. Tools for Small Firms: Performance Management Software, Rena M. Klein, FAIA

AIA KnowledgeNet

<http://www.aia.org/akr/Resources/Documents/AIAP072711>

**Selected AIA Podnet podcasts**

1. *Financial Management for Design Professionals: The Path to Profitability*

Steve L. Wintner, AIA, Michael Tardif, Assoc. AIA, and Donnie Kenneth, moderator

<http://www.aia.org/practicing/AIAPodnet/pod_tardiff>

1. *Ownership and Leadership Transitions*

Michael Strogoff, AIA and Cliff Moser, AIA, moderator

<http://www.aia.org/practicing/AIAPodnet/pod_strogoff>

1. *Managing Your Digital Practice with New AIA Contract Documents*

Robert E. Middlebrooks, AIA, Steven F. Weiss, FAIA, and Markku Allison, AIA moderator

<http://www.aia.org/practicing/AIAPodnet/pod_middlebrooks>

1. *Project Finance for Principals and Project Managers*

James L. Sawyer, AIA

<http://www.aia.org/practicing/AIAPodnet/pod_sawyer>

1. *Insurance Needs and Concerns for Architecture Firms*

Katherine Enos, Esq., Assoc. AIA; Scott Frank, moderator

<http://www.aia.org/practicing/AIAPodnet/pod_nav_enos>

**Selected AIA Best Practices PDFs**

Firm Development

1. *Starting a Firm: Essential Resources*

<http://www.aia.org/aiaucmp/groups/ek_members/documents/pdf/aiap016457.pdf>

1. *Starting a Firm: Lessons from Failure*

<http://www.aia.org/aiaucmp/groups/ek_members/documents/pdf/aiap016459.pdf>

1. *New Firms Grow with a Marketing Plan*

<http://www.aia.org/aiaucmp/groups/ek_members/documents/pdf/aiap016461.pdf>

1. *Considering Your Own Firm?*

<http://www.aia.org/aiaucmp/groups/ek_public/documents/pdf/aiap037333.pdf>

1. *Comments from Recent Startups*

<http://www.aia.org/aiaucmp/groups/ek_public/documents/pdf/aiap037334.pdf>

1. *Business Plans: The Executive Summary*

<http://www.aia.org/aiaucmp/groups/ek_public/documents/pdf/aiap037535.pdf>

1. *Legal Structure of Architecture Firms*

<http://www.aia.org/aiaucmp/groups/ek_members/documents/pdf/aiap016464.pdf>

1. *Understanding Organizational Structure*

<http://www.aia.org/aiaucmp/groups/aia/documents/pdf/aiab087306.pdf>

1. *Business Planning for Small-Firm Owners*

<http://www.aia.org/aiaucmp/groups/ek_members/documents/pdf/aiap036967.pdf>

Marketing, Business Development, and Outreach

1. *Evaluating Prospective Clients*

<http://www.aia.org/akr/Resources/PDFS/AIAP016430>

1. *Ten Essential Steps of Marketing Planning*

<http://www.aia.org/akr/Resources/PDFS/AIAP016481>

1. *Make the Most of Your Marketing Material*

<http://www.aia.org/akr/Resources/PDFS/AIAP016482>

1. *Marketing That Sets Your Firm Apart*

<http://www.aia.org/akr/Resources/PDFS/AIAP016483>

1. *The Go/No-Go Decision: From a Risk Management Perspective*

<http://www.aia.org/akr/Resources/PDFS/AIAP016486>

1. *Market Your Strengths, But Don't Oversell*

<http://www.aia.org/akr/Resources/PDFS/AIAP016471>

1. *Finding Leads*

<http://www.aia.org/akr/Resources/PDFS/AIAP016493>

1. *Developing Winning Proposals: A Preproposal Checklist*

<http://www.aia.org/akr/Resources/PDFS/AIAP016489>

1. *Developing Winning Proposals: A Résumé Preparation Checklist*

<http://www.aia.org/akr/Resources/PDFS/AIAP016490>

1. *Developing Winning Proposals: The Final Check*

<http://www.aia.org/akr/Resources/PDFS/AIAP016491>

1. *The Client Interview: A Sample Questionnaire*

<http://www.aia.org/akr/Resources/PDFS/AIAP016488>

1. *Effective Marketing Presentations from a Client Point of View*

<http://www.aia.org/akr/Resources/PDFS/AIAP016492>

1. *Construction Signs as a Marketing Tool*

<http://www.aia.org/akr/Resources/PDFS/AIAP016495>

1. *Getting Good Press*

<http://www.aia.org/akr/Resources/PDFS/AIAP016496>

Accounting Basics

1. *Accounting Basics: The Income Statement & Key Performance Indicators*

<http://www.aia.org/practicing/akr/AIAB092061>

1. *Starting a Firm: Essential Financial Vocabulary*

<http://www.aia.org/akr/Resources/PDFS/AIAP016510>

1. *Selecting a Financial Consultant*

<http://www.aia.org/akr/Resources/PDFS/AIAP016504>

1. *Firm Expenses*

<http://www.aia.org/akr/Resources/PDFS/AIAP016505>

1. *Financial Management: 10 Key Performance Indicators* <http://www.aia.org/aiaucmp/groups/ek_members/documents/pdf/aiap016508.pdf>
2. *Calculating Billable Ratios*

<http://www.aia.org/akr/Resources/PDFS/AIAP016509>

1. *Starting a Firm: Basic Financial Principles*

<http://www.aia.org/akr/Resources/PDFS/AIAP016511>

Risk Management

1. *Risk Management Checklist*

<http://www.aia.org/akr/Resources/PDFS/AIAP016584>

1. *Warning Signs of Potential Claims*

<http://www.aia.org/akr/Resources/PDFS/AIAP016586>

1. *Controlling Exposure to Risk*

<http://www.aia.org/akr/Resources/PDFS/AIAP016589>

1. *Selecting a Professional Liability Insurance Broker*

<http://www.aia.org/akr/Resources/PDFS/AIAP016597>

1. *How to Minimize Your Insurance Premiums*

<http://www.aia.org/akr/Resources/PDFS/AIAP016598>

Firm Operations

1. *Project File Organization*

<http://www.aia.org/akr/Resources/PDFS/AIAP016614>

1. *Quality Control: A Project Record Retention Checklist*

<http://www.aia.org/akr/Resources/PDFS/AIAP016615>

1. *Fundamentals of Record Retention*

<http://www.aia.org/akr/Resources/PDFS/AIAP016617>

1. *Project Records Retention*

<http://www.aia.org/akr/Resources/PDFS/AIAP016619>