

P2S AI-AUTOMATION ROADMAP | 2024-2026

Strategic Architecture & Solution Implementation



In Development – Solution Centers:

Project Showcase: Profiles and Success Stories

Automates content development for project profiles and success stories, creating a dynamic process that updates as projects progress and new external collaborations are prepared.

 **Just over 4 Months**

BD Research & Engagement

Uses AI tools like ZoomInfo to gather client insights, align them with ABM strategies, and find cross-selling opportunities across Legence companies, streamlining targeted outreach.

 **4 – 5 Months**

Microsoft Purview Communications

Identifies RFPs and quotes via email communications through keyword and metadata monitoring, ensuring timely responses and reducing missed sales opportunities.

 **3 – 4 months**

Autodesk Revit – Tool Development

Custom Revit tool automates design and form-based workflows, improving productivity by reducing manual data entry.

 **Maintenance**

Chatbot UX/UI & Feature Planning

Following the iterative design/development process, user feedback will be integrated to refine the chatbot’s functionality and UX/UI. Future feature development will be planned in phased rounds, ensuring continuous improvements.

 **4 – 6 Months**

Employee Path Analysis

Assesses employee skills, wages, career goals, performance, and market trends, helping HR identify optimal career paths, salary adjustments, and development opportunities.

 **5 – 6 Months**

Schedule Change Request App

Streamlines employee schedule changes with an automated system for submission and approval, reducing paperwork and improving efficiency.

 **In-Progress**

Driver’s License and Vehicle Insurance Update App

Simplifies the process for employees to update vehicle-related documents, automating collection and compliance tracking.

 **In-Progress**

Shared Solutions (SHS)

Shared Solutions (SHS) are tools and systems that, while designed for specific tasks or departments, can be leveraged by multiple teams to streamline workflows. These solutions operate as standalone entities but share their outputs or data with other business units when relevant.

In Development – Shared Solutions:

Content Builder – Fees & Proposals

Develops an advanced document generation system, starting with fee letter proposals and expanding to comprehensive proposals, using AI to enhance accuracy and SOQ customization.

 **20-24 Months**

Solution Scaled – Legence Cross-Selling

Employs AI to identify and suggest cross-selling opportunities between Legence companies, analyzing client interactions and project data to generate actionable integration and sales scenarios.

 **1.5-2.5 Months**

Document Generator

Automates the creation of meeting minutes, forms, and reports, using AI and Power Automate to streamline administrative workflows.

 **In-Progress**

Chatbots – Subject Matter Experts

AI-driven chatbots provide employees with instant answers to frequently asked questions, minimizing reliance on manual support and boosting productivity.

 **In-Progress**

Salesforce Focused Solutions (SF)

Salesforce Focused Solutions (Sf) are tools and systems specifically built to enhance and integrate with our **Salesforce** CRM. These solutions improve data management, streamline workflows, and provide real-time insights, all within the Salesforce ecosystem.

In Development – Salesforce:

Dynamic Profiles & Data Integration

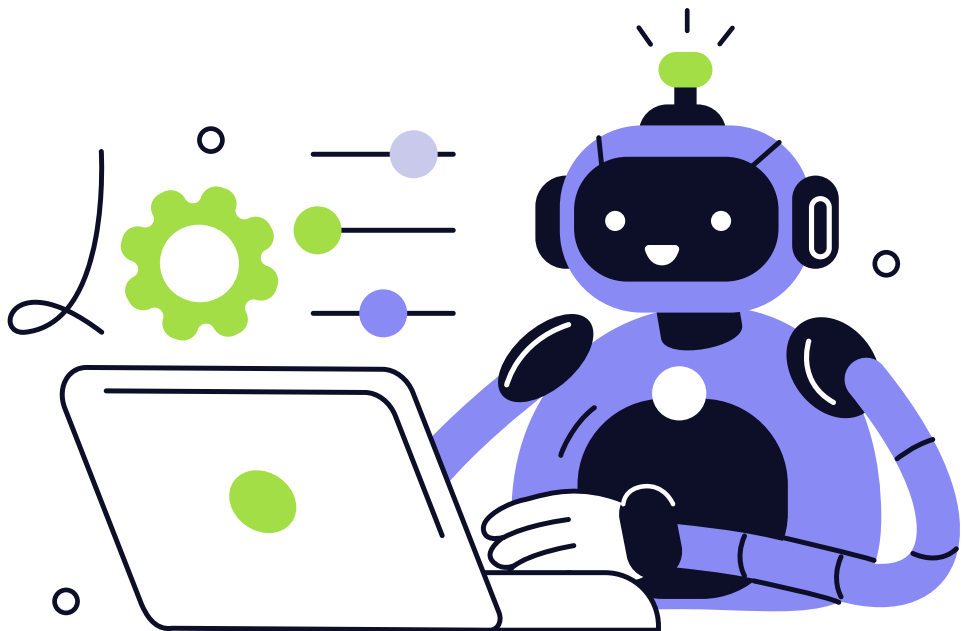
Enhances Salesforce integration by automating real-time updates of key employee data and project associations, focusing on streamlined data flows and improved user interface elements.

 **2.5 Months**

Project Intelligence Dashboard

Replaces the “Content Archive” with a dynamic Salesforce dashboard that streamlines proposal generation and enhances decision-making through live data visualization.

 **3.5 Months**



Central Activity Terminal– Unified Performance Platform (CAT)

A unified performance platform designed to maximize the investments made in establishing a comprehensive tech stack. Through secure integration of internal business operations data and approved platforms (i.e., Salesforce, CFT, ZoomInfo, Legence sources, etc.), CAT leverages AI to uncover patterns and interconnections across disparate data sets, enabling precision through predictive models.

Key Work Areas:

1. On-the-Radar: Reduces reactive processes through continual opportunity/risk analysis. CAT uses AI to analyze market trends, competitor activity, economic indicators, and other custom parameters to offer predictive insights, action implications, and recommendations for resource allocation.

2. On-the-Job: Maintains and monitors project performance, budgetary alignment, team capacity, and operational efficiency. It provides actionable insights on client interactions, sales cycles, and marketing campaigns, ensuring strategic alignment of efforts and optimized workflows.

3. On-the-Record: Conducts retrospective analysis to evaluate KPIs, benchmark against industry standards, and synthesize feedback from relevant sources and stakeholders. This ensures continuous improvement and compliance in reporting and its outcomes.

The Value Proposition:

The Central Activity Terminal bridges traditional data silos, making crucial information visible and actionable across the organization. It enhances the work done in Solution Centers and through Shared Solutions by ensuring that overlapping data is accessible when needed. This integrated approach streamlines communication and decision-making while protecting data privacy through robust governance and compliance.

Complimentary to Existing Platforms:

While Salesforce serves as a CRM, CAT specializes in performance tracking, risk analysis, and real-time project insights. Co-Pilot further maximizes our tech investments by synthesizing data across departments and automating the analysis of large datasets. This integration allows teams to quickly assess opportunities, risks, and performance, providing a unified view of ongoing and completed projects.

In Development – Central Activity Terminal:

P2S Perspective

Continuously track and monitor market trends, competitor activity, regulatory/code compliance, and best practices. Receive scheduled opportunity-risk analysis reports with tailored insights and action-based recommendations. Available across BU's and disciplines with knowledge base

 **6 – 8 Months**

Legence Collaboration

A data-driven workspace that identifies and facilitates cross-company opportunities within Legence. It focuses on cross-selling, cost-sharing for events, shared PR campaigns, and R&D partnerships to boost operational efficiency and strategic growth.

 **5 – 7 Months**

P2S AI Education Track

An ongoing program that continually identifies opportunities for employee engagement in learning new technologies. It offers workshops, certifications, incentive programs, and career development paths to drive user adoption and support effective change management.

 **Ongoing**

Solution Audit & Needs Assessment

A standing program that assesses evolving needs to ensure AI and automation solutions remain aligned with best practices and company objectives. This audit nurtures existing systems and identifies areas for improvement.

 **Ongoing**

Process, Practice, & Governance

A structured program designed to promote transparent employee engagement and governance around AI technologies. It includes regular brown bag sessions and the assembly of an AI steering committee to guide decision-making.

 **Ongoing**

