



Forvis Mazars Construction Technology: What Future-Ready Contractors Do

October 2026

U.S. Presence

Leading U.S. Firm

\$2.24B

Revenue (FY 2025)¹

77

Markets

31

States

600+

Partners & Principals

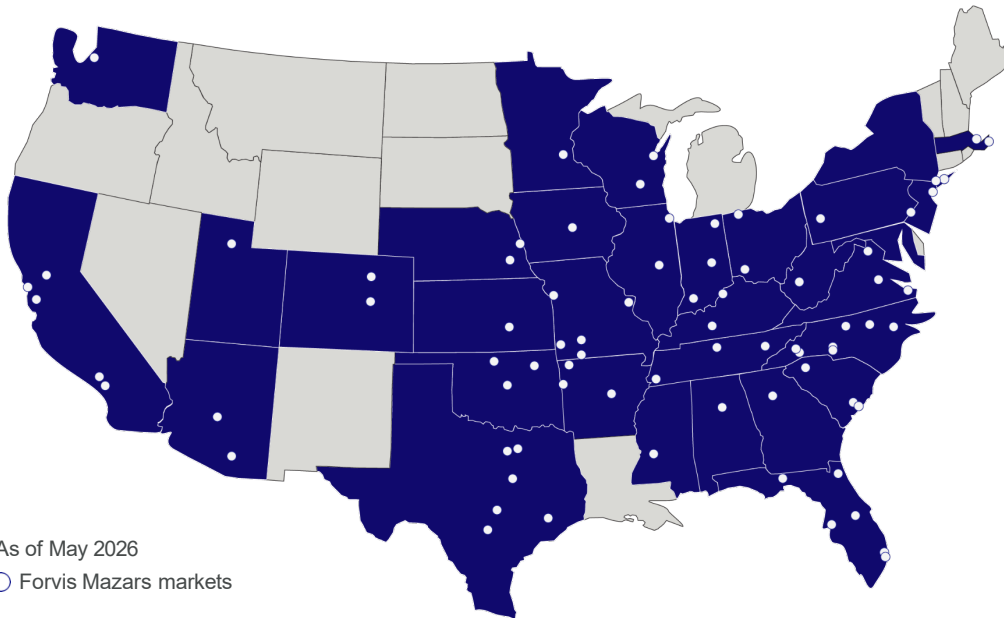
7,000+

Employees

84

Net Promoter Score^{® 2}

("World-Class" Ranking)



Alabama
Birmingham

Arizona
Phoenix
Tucson

Arkansas
Fort Smith
Little Rock
Rogers

California
Irvine
Los Angeles
Sacramento
San Francisco
San Jose

Colorado
Colorado Springs
Denver

Florida
Boca Raton
Fort Lauderdale
Jacksonville
Orlando
Tallahassee
Tampa Bay

Georgia
Atlanta

Illinois
Chicago
Decatur

Indiana
Evansville
Fort Wayne
Indianapolis

Iowa
Des Moines

Kansas
Wichita

Kentucky
Bowling Green
Louisville

Massachusetts
Boston
Brewster

Minnesota
Minneapolis

Mississippi
Jackson

Missouri
Branson
Joplin
Kansas City
Springfield
St. Louis

Nebraska
Lincoln
Omaha

New Jersey
Iselin

New York
Long Island
New York City

North Carolina
Asheville
Charlotte SouthPark
Charlotte Uptown
Greensboro
Greenville
Hendersonville
Raleigh

Ohio
Cincinnati
Toledo

Oklahoma
Enid
Oklahoma City
Tulsa

Pennsylvania
Philadelphia-
Metro Area
Pittsburgh

South Carolina
Charleston
Greenville
Summerville

Tennessee
Knoxville
Memphis
Nashville

Texas
Austin
Dallas
Fort Worth
Houston
San Antonio
Waco

Utah
Salt Lake City

Virginia
Norfolk
Richmond

**Washington D.C.
Metro Area**

Washington
Seattle

West Virginia
Charleston

Wisconsin
Appleton
Madison

Today's Presenters



Jim Wagner
Managing Director
Construction Technology
Services



John Massie
Lead Consultant
Construction Technology
Services

Objectives

1. Future-ready Is A Capability, Not A Purchase
2. Start With The Business Question, Not The Software
3. Know What You Own, How It Is Used, And What You Can Trust
4. Scan The Market Continuously, And Know Where AI Fits
5. Leadership, Pilots, And Culture Change Behavior



Expectations for Today

Aim for one thing you will actually do.

3%

of what is presented is typically remembered
one week later

1

What is one takeaway you can put to work in
your business this quarter?

https://condor.depaul.edu/ymendels/130/curve_of_forgetting.pdf

Built For Forward



One of the Largest

U.S. Public
Accounting Firms

100+

Years Serving
Construction

55

Construction &
Real Estate Partners

84%

Net Promoter Score

27

CCIFPs

2015

CFMA Principal Partner



*NPS is a simple metric based on a survey question that asks clients how likely they are to recommend the firm to a friend or colleague on a numeric scale of 0 - 10. To better understand how the firm's NPS score was calculated visit ClearlyRated's resource for [NPS for Accounting firms](#). Below, we have shared statistics regarding the firm's NPS and comparable scores from other leading brands and our industry.

Business Technology Services

We solve business challenges and support innovation through technology solutions.

At Forvis Mazars, our Business Technology Services team helps organizations align people, processes, data, and technology to drive better business outcomes. We provide expertise in ERP, CRM, AI, automation, analytics, and cloud technologies, helping clients transform operations, gain actionable insights, and navigate change with confidence.

SERVICES INCLUDE



Solution Assessment and Selection



Implementation Project Rescues



System Implementation and Integration



Process and Technology Design



Business Intelligence (BI) and Analytics



Robotic Process Automation (RPA)



AI and Copilot



Custom Application Development



Upgrades, Enhancements, and Automation



Training, Monitoring, and Support



Managed Services



Digital Transformation Strategy

CONSTRUCTION TECHNOLOGY SERVICES

Forvis Mazars helps construction companies connect their people, projects, and financial operations through technology solutions that improve visibility, streamline processes, and support informed decision-making.



Our experienced team of industry and technology professionals provides:



Software assessments



Software implementations



Software upgrades & enhancements



Digital transformation strategy



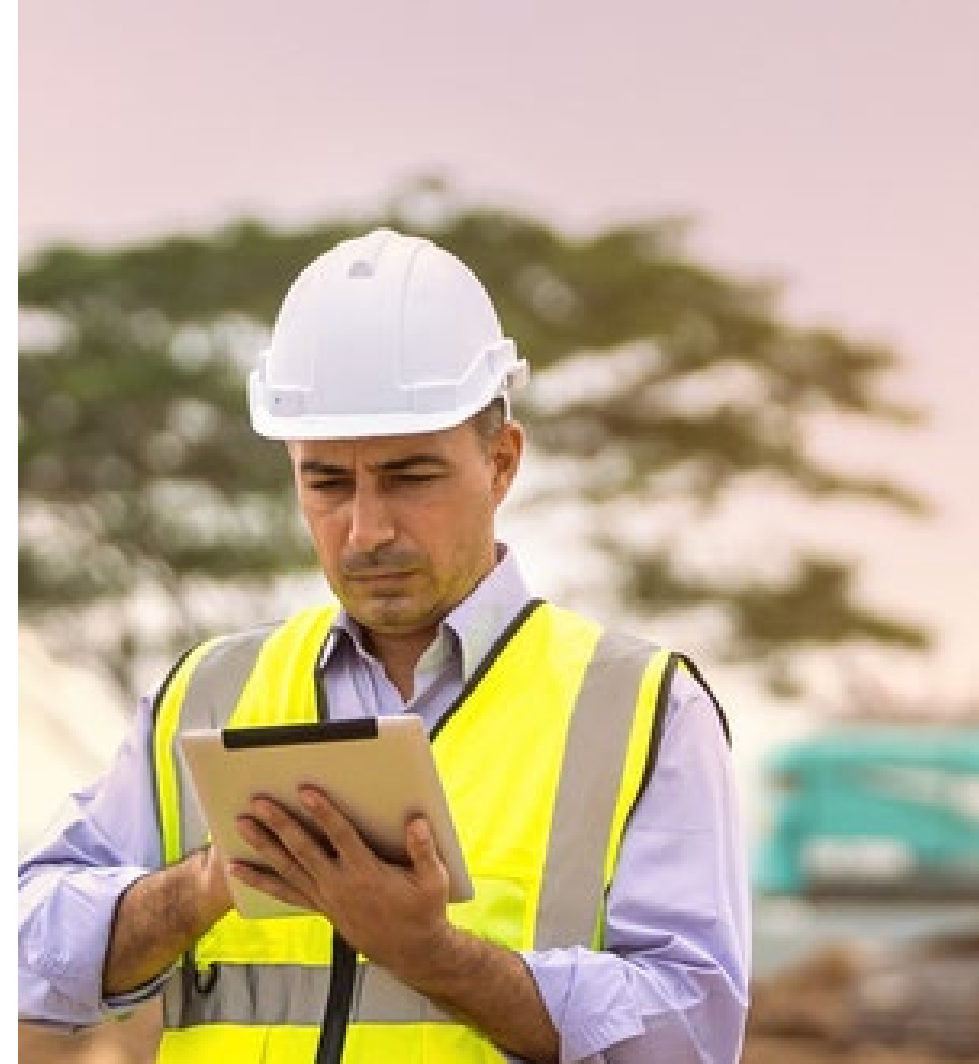
Digital transformation project execution



Recruiting



Business consulting



Explore construction technology designed to help improve productivity.

Get more from your Trimble ERP

Consultants supporting your people, processes, data, and technology — from selection through adoption.



AI & Digital Transformation

AI readiness, GenAI, Copilot, and mixed-reality solutions built for the jobsite.



Implementation & Integration

Trimble Construction One™ and Viewpoint ERP deployed and connected end to end.



Data & Analytics

Standardized data and real-time reporting across finance, projects, HR, and IT.



User Adoption & Enablement

Process design, governance, and training that make new systems stick.

Ready to unlock productivity? Let's talk construction technology.

2025 Trimble Partner of the Year

What contractors say is hardest

The top technology challenges are people challenges.¹

User adoption and training

Tools deploy faster than teams are prepared.

Integration between systems

Disconnected data forces duplicate entry.

Internal IT capacity

Lean teams support too many platforms.

Cybersecurity exposure

Connected jobsites widen the attack surface.

Cost and unclear ROI

Value is asserted, then rarely measured.

Data quality and trust

Leaders will not act on numbers they doubt.

1

Source: 2025 Construction Outlook National Survey — “What are your biggest technology and IT challenges?”

The Executive Question

Can your company adopt technology that does not exist yet?

The strategic risk is not selecting the wrong tool. It is building an organization that cannot absorb change.

The Pace Of Change

Technology will keep moving.
Your operating model must keep up.

PREPARE FOR CAPABILITY, NOT A PRODUCT



Who Leads The Change

Future-ready contractors build a leadership coalition

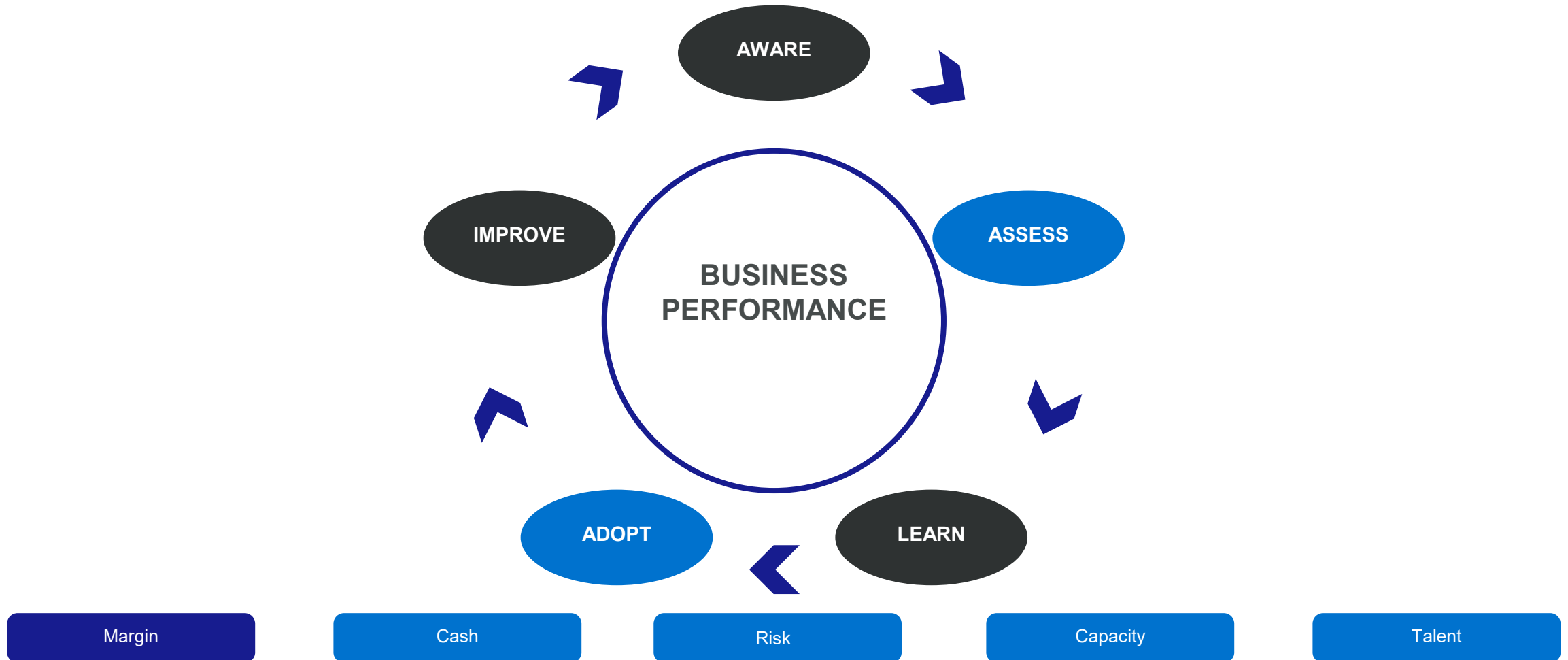
Technology transformation is cross-functional by nature.



No single executive can make the organization future-ready alone.

THE OPERATING MODEL

Five moves. One continuous cycle.



01

Awareness

Understand the role. Frame the business questions.



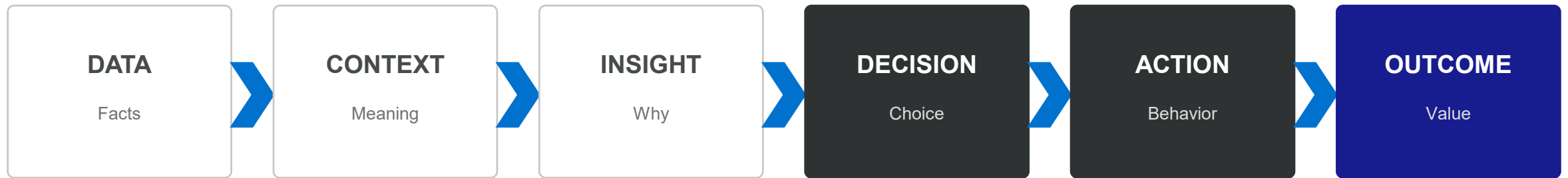
Awareness

Ask business questions before technology questions

- 01 — What business problem are we solving?
- 02 — What decision should become faster or better?
- 03 — Where does work create delay, risk, or rework?
- 04 — What value should the investment create?
- 05 — How will we know people adopted it?

Awareness

Data creates value only when it changes a decision



**Reporting explains the past.
Leadership uses insight to shape what happens
next.**

02

Assess

Know what you own. Know how it is used. Know what is missing.



Current-state Assessment

Eight lenses expose the real environment

APPLICATIONS

What is owned

PROCESSES

How work moves

DATA

Quality + trust

INTEGRATIONS

Where systems connect

PEOPLE

Skills + ownership

ADOPTION

Behavior + usage

GOVERNANCE

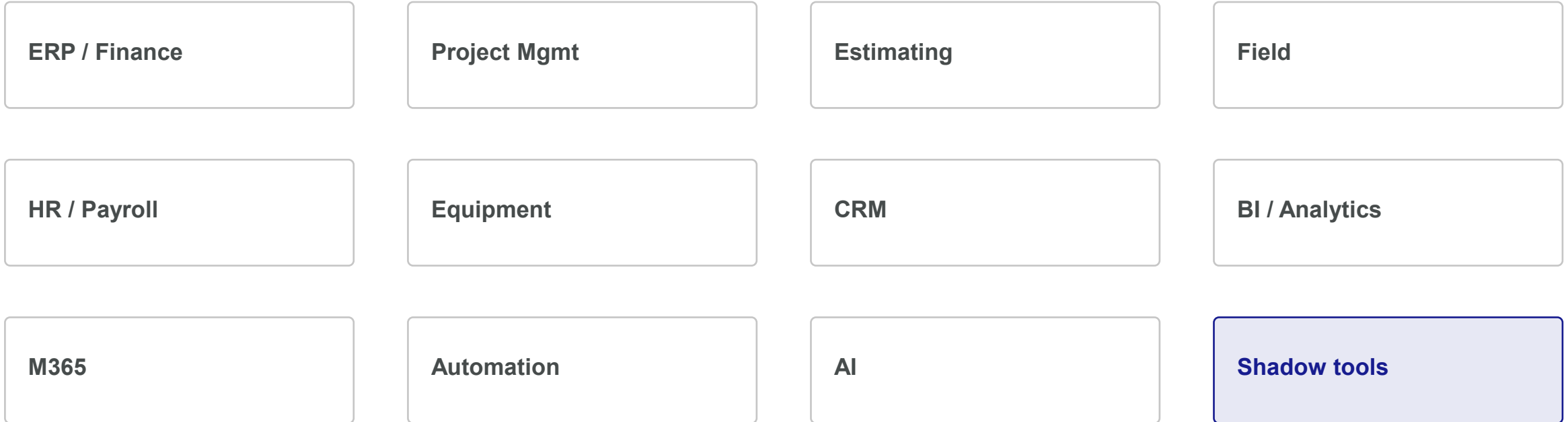
Decisions + controls

AI READINESS

Foundation + guardrails

Portfolio Visibility

Companies may know what they pay for without having full visibility into available capabilities.

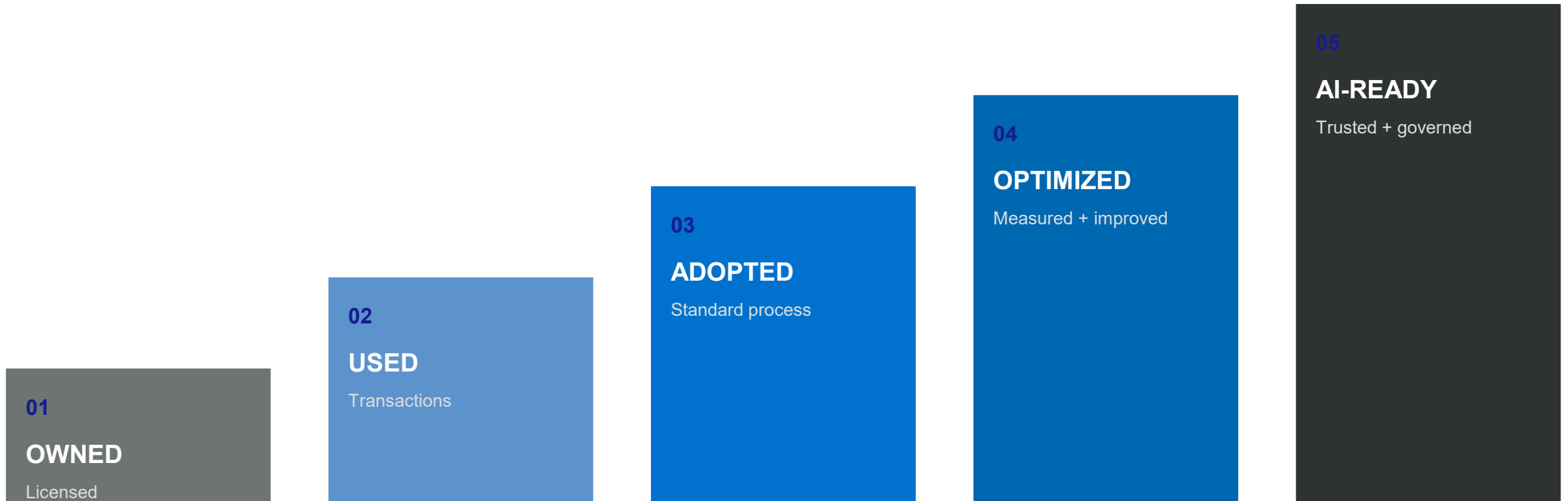


Inventory licenses • capabilities • owners • usage • integrations • overlap

Maturity

Ownership is not adoption

AI value begins after process discipline and data trust.



Process Assessment

Map the work, not just the software



Where does work begin?

Who touches it?

Where is data rekeyed?

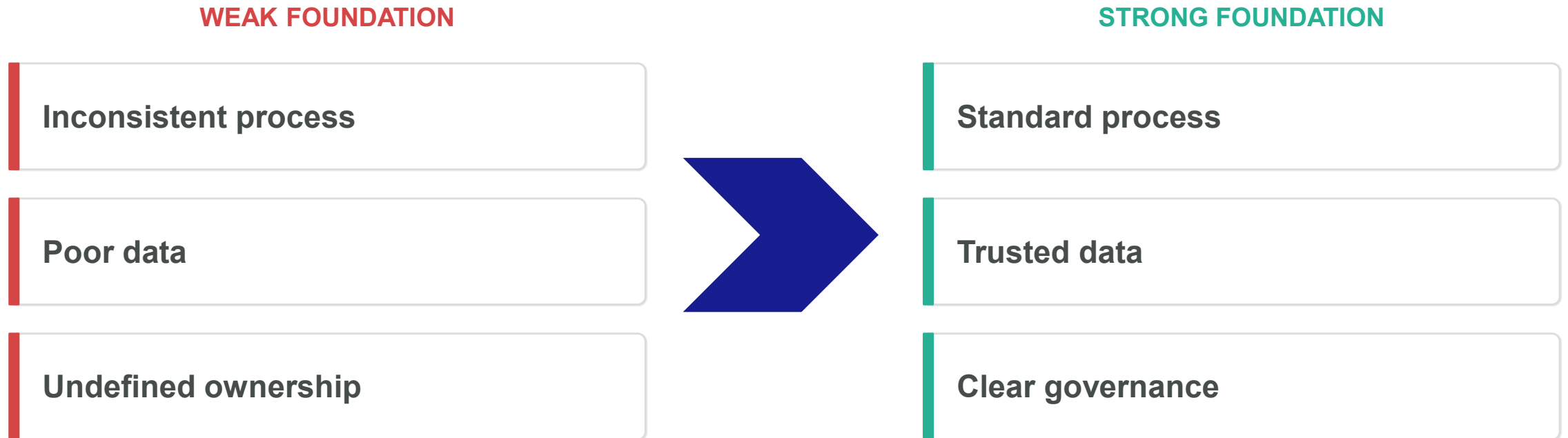
Where does approval stall?

Which exceptions need people?

What could be automated?

AI Readiness

Avoid automating chaos



AI can execute underlying processes more quickly and at greater scale, making process quality and governance important.

03

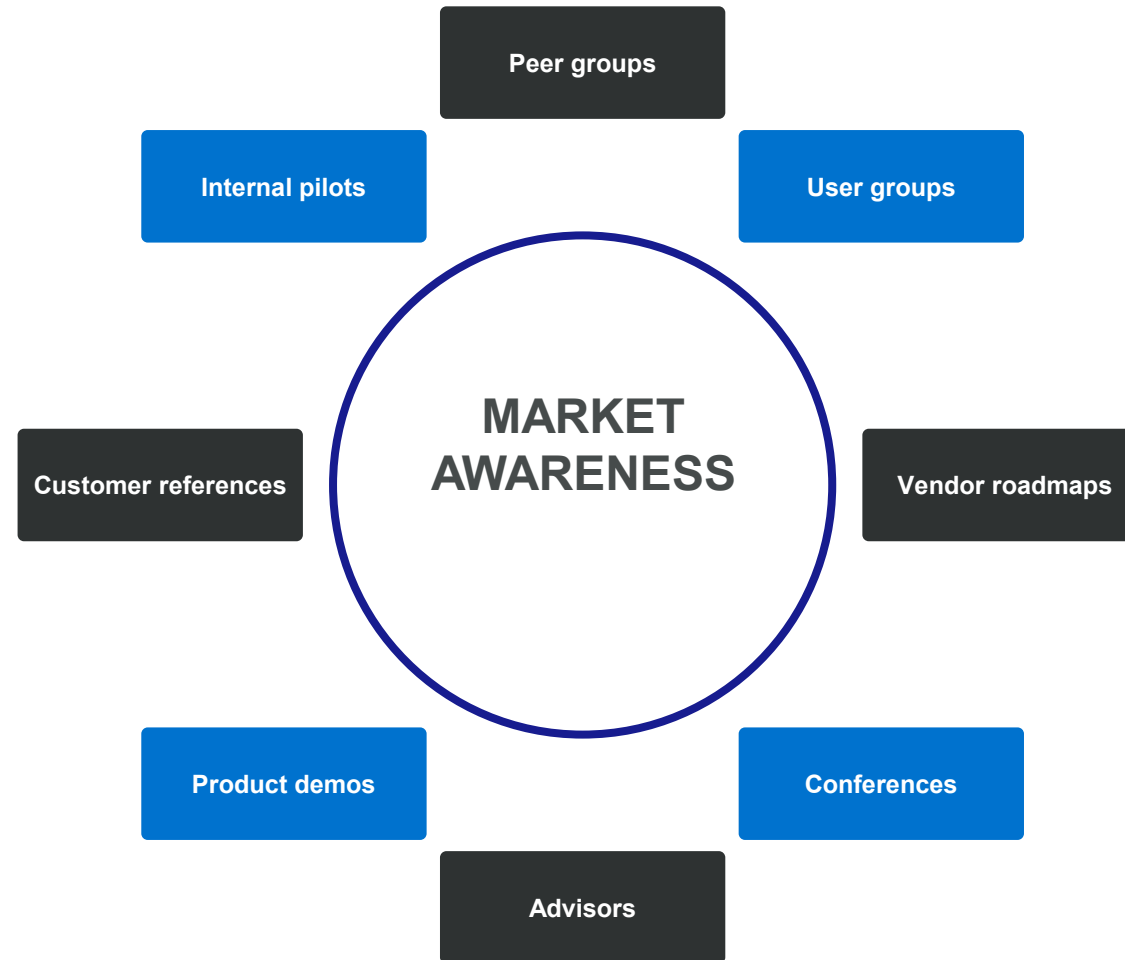
Learn

Build market awareness before a buying decision is required.



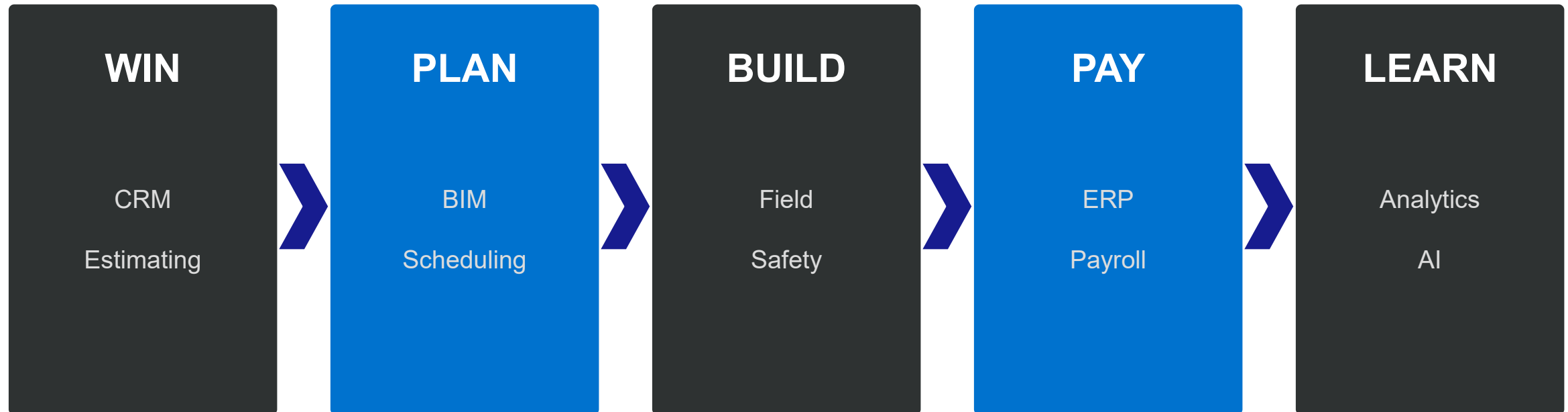
Continuous Learning

Create a radar, not a research project



The Landscape

Organize the market around business capabilities



Avoid the vendor-logo wall. Start with the work and the outcome.

AI Enters Three Ways

Different paths. Different governance.

1 EMBEDDED AI

Capabilities inside ERP, project management, HR, field, and productivity applications.

Ask: What is already included?

2 ENTERPRISE AI

Assistants grounded in company data, documents, policies, and communications.

Ask: What may it access?

3 AI AGENTS

Bounded, multistep work across systems with human accountability.

Ask: What action may it take?

Construction Finance Use Cases

Start where work is repetitive, rules-based, and exception-heavy

Job-cost variance

WIP review

Invoice coding

PO matching

Payroll exceptions

AR prioritization

Contract review

Cash forecasting

Close support

AUTOMATE THE ROUTINE • ESCALATE THE EXCEPTION • KEEP HUMANS ACCOUNTABLE

Evaluate the Partner

Select for the next operating model, not today's demo



**Industry
commitment**

**Product
investment**

**Integration
strategy**

Data accessibility

**Security +
governance**

AI roadmap

**Partner
ecosystem**

**Customer
success**

04

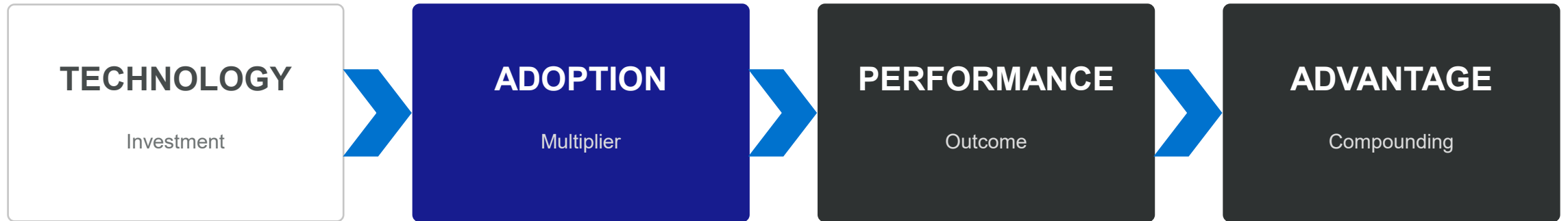
Adopt

Turn technology investment into changed behavior.



The Value Chain

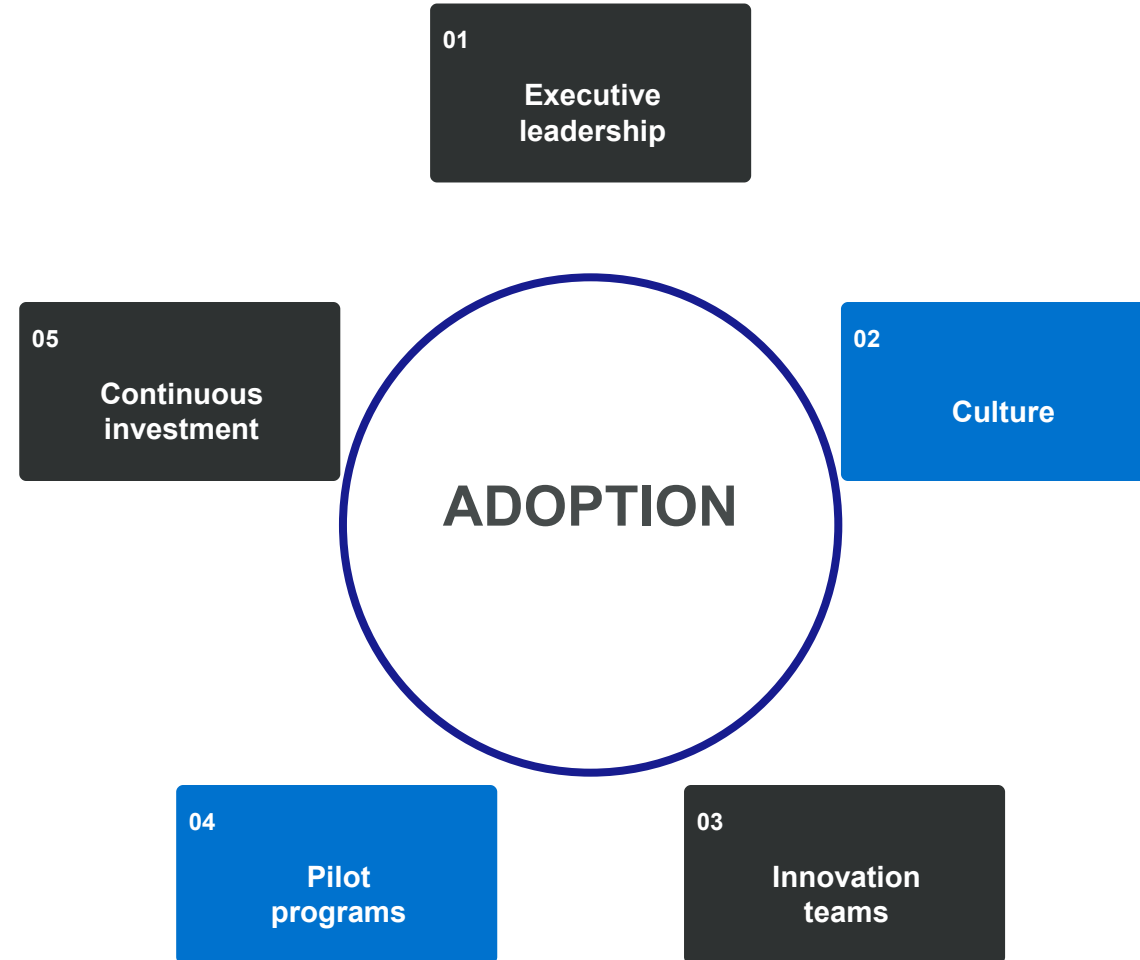
Technology investment creates value when supported by effective adoption.



**Organizations may invest in step one and hope for step three.
Effective organizations deliberately plan for adoption.**

The Adoption Operating System

Five accelerators create repeatable execution



Executive Leadership

Leadership is an important adoption accelerator

CONNECT TO OUTCOMES

Frame technology in margin, cash, risk, productivity, and capacity.

ESTABLISH THE WHY

Create one narrative that survives contact with the field and the back office.

DRIVE ACCOUNTABILITY

Name owners. Measure adoption. Retire the old process.

Leadership attention is not a kickoff event. It is an operating cadence.

Innovation Team

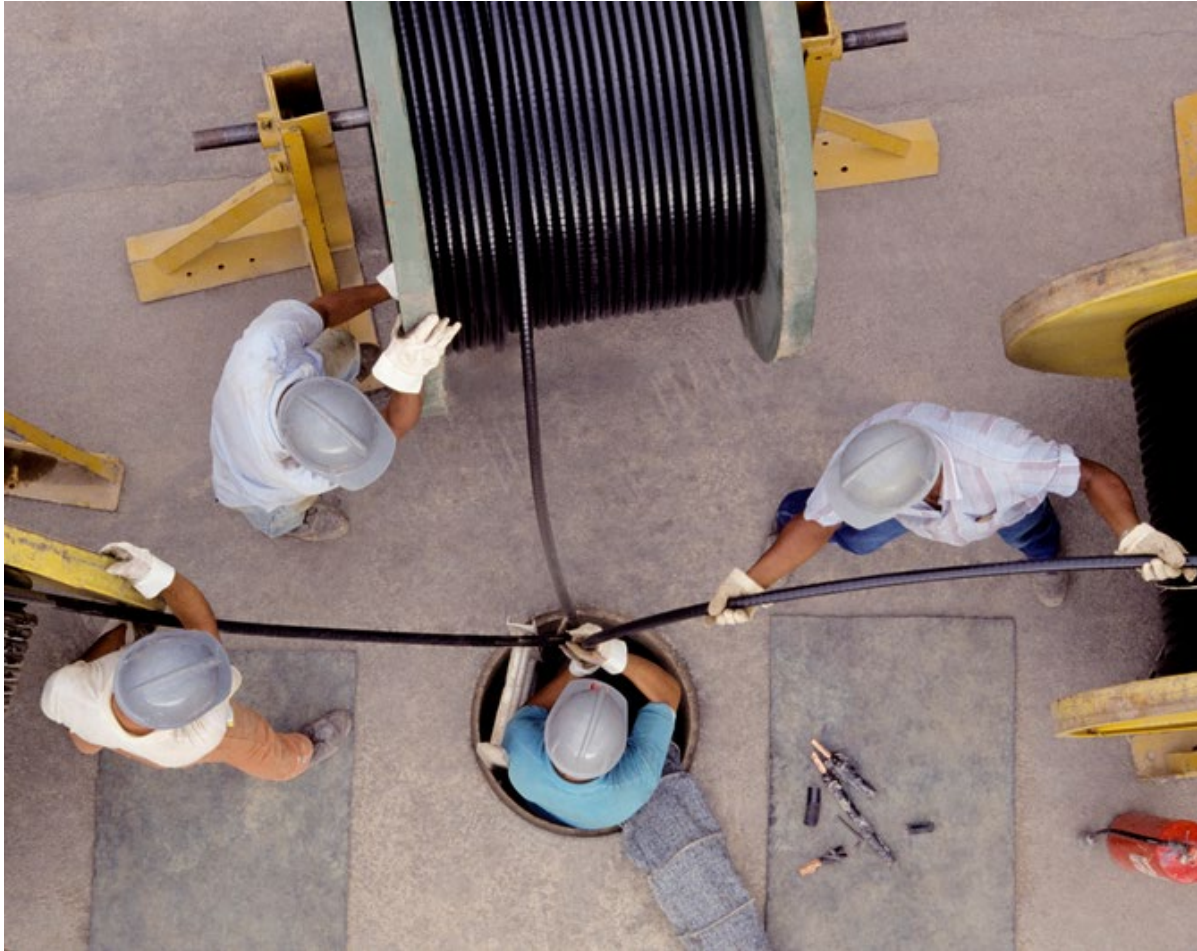
A standing cross-functional group with authority



**THE DIFFERENCE BETWEEN A COMMITTEE AND AN INNOVATION TEAM IS
AUTHORITY.**

Pilot Before Scale

Prove it small. Learn fast. Scale with evidence.



PILOT

Real jobs

LEARN

Capture friction

IMPROVE

Fix process

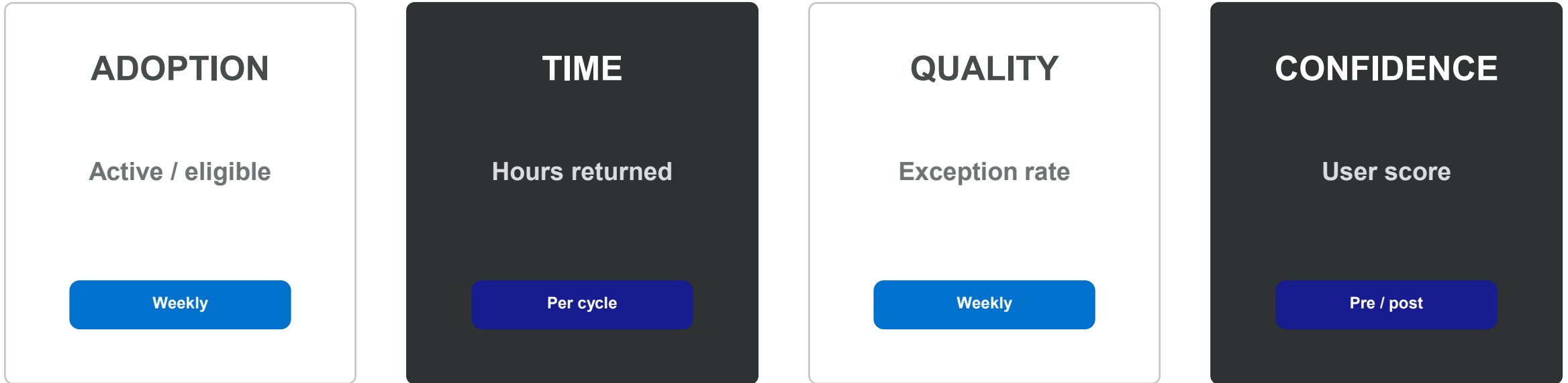
SCALE

Use evidence

Include enthusiasts and respected skeptics.

Pilot Scorecard

Define success before the pilot begins



Measuring the pilot helps build support for a rollout decision.

Culture

Build a company that can absorb change



- Leaders repeat the why
- People can challenge broken processes
- Feedback reaches decision-makers
- Learning is expected
- Experiments use guardrails
- **Old processes are retired**

05

Improve

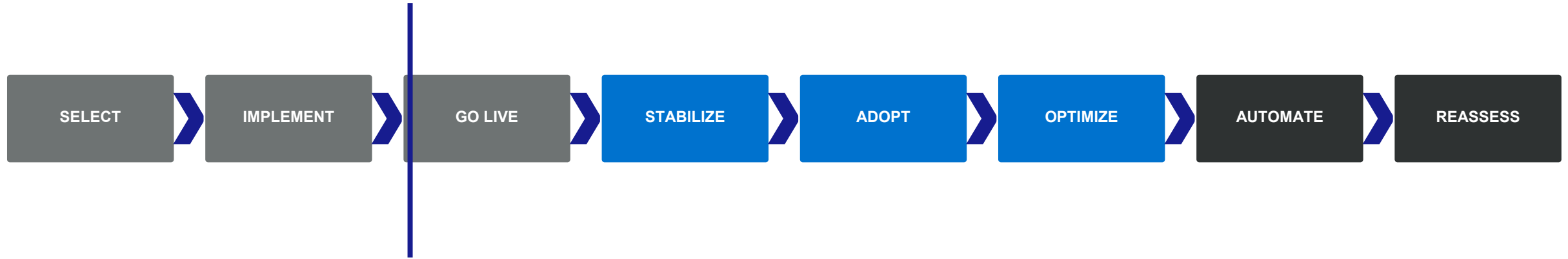
Make technology value a recurring management process.



The Lifecycle

Go-live is the starting line

FUNDING OFTEN
STOPS HERE



Significant value may be created through adoption, optimization, and automation.

training • coaching • optimization • automation

90-Day Rhythm

Create a management cadence for technology value



Executive Scorecard

Measure business outcomes and adoption together

BUSINESS OUTCOMES

Cash conversion

Margin predictability

Forecast accuracy

Billing timeliness

ADOPTION

Active users

Process compliance

Training completion

Legacy usage

TECH HEALTH

Utilization

Integration failures

Duplicate systems

Unused licenses

AI READINESS

Data quality

Standard process

Governance coverage

Pilot outcomes

The Continuous Improvement Flywheel

A company ready for what comes next



ASSESS

PRIORITIZE

PILOT

ADOPT

MEASURE

OPTIMIZE

The process compounds.
The capability can become
an advantage.

The Next 90 Days

Five actions to begin now

- 1 Inventory the capabilities already owned
- 2 Identify three high-friction processes
- 3 Assess adoption, data, and AI readiness
- 4 Establish a cross-functional innovation team
- 5 **Launch one controlled pilot with defined success**

FUTURE-READY CONTRACTORS DO NOT PREDICT EVERY TECHNOLOGY.

They build an organization capable of
evaluating, adopting, and creating value from
whatever comes next.

Discussion

What will your company need to be ready for next?

QUESTIONS + CONVERSATION

Awareness • Assessment • Learning • Adoption • Improvement

Q & A



Construction Technology
Services

Questions?

Contact

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