

Financial Management Resources

Whether you're an architect just starting your own firm – or running and expanding an established firm – understanding, tracking, and managing your company financials are critical. These resources have been identified by AIA members as tools to help you monitor your work and plan strategically for success. If you have suggestions for additional references that you have found helpful, please share them with us at AIATrust@aia.org.

Financial References

- [Financial Management for Design Professionals](#)
by Steve Wintner
An accessible guide to financial management, *Financial Management for Design Professionals* is written for design firm principals who are responsible for their firm's finances but have little or no financial management education or experience. For mid-career design professionals looking to advance their careers, the book is an indispensable reference and training guide.
- [7 Key Financial Performance Indicators for a Successful Architecture Firm](#)
This blog on EntreArchitect, also by Steve Wintner, gives a concise overview of the Keys to Your Financial Success.
- [The Architect's Guide to Small Firm Management: Making Chaos Work for Your Small Firm](#)
by Rena M. Klein
A guide to management success for sole practitioners and leaders of small design firms to help cope with the chaos and prepare for the unexpected. *The Architect's Guide to Small Firm Management* is a no-nonsense guide to repurposing daily demands into workable, goal-directed solutions.
- [The Business of Design: Balancing Creativity and Profitability](#)
by Keith Granet
Consultant Keith Granet provides the necessary tools to create and run a thriving design business. Organized into six clear chapters interwoven with stories, the author's own experiences and life lessons, it guides the reader through the steps of creating a successful firm, from the initial foundation of a design practice, to financial management, marketing and public relations, human resources, and project management and then, the trend of product development.
- [Managing the Professional Service Firm](#)
by David Maister
Explores marketing, business development, multinational strategies, human resources policies, profit improvement, strategic planning, and effective leadership for the professional services firm.
- [The Architect's Handbook of Professional Practice – 15th Edition](#)
The updated architecture profession's standard on practice issues, covering all aspects of architectural practice, including legal, financial, marketing, management, and administrative issues. An accompanying website contains samples of the latest AIA Contract Documents in PDF format. Digital [e-book](#) version also available.

- [Successful Financial Management](#), an ebook by PSMJ
Professional Services Management Journal (PSMJ), is a publisher, education provider, and advisor on architecture and engineering business management. This ebook gives a clear and concise overview, direct from PSMJ's architecture and engineering industry experts, of the complex subject of financial management, the ultimate determinant of a firm's success or failure.

Financial Software

- [BQE Software](#) - offers real-time financials, time & expense tracking and billing from an easy to use platform. [ArchiOffice](#) and [BillQuick](#) each come in two versions, one to install on a server/desktop and a cloud version.
- [BigTime](#) - Online Time and expense tracking, WIP management, billing & invoicing, task & workflow management software in a single integrated system for professional service firms.
- [InFocus](#) - Project-based ERP software for Architects & Engineers to manage AE firm's entire project lifecycle—sales, PM, data analysis and invoicing.
- [Deltek](#)
 - [Ajera](#) – Ideal for growing firms looking to streamline back office processes and provide real-time reporting
 - [Vantagepoint](#) – Put your people and projects at the center of your business to maximize productivity and increase profitability
 - [Vision](#) – Powerful tools for greater visibility, real-time information and streamlined processes for front- and back-office workers
- [Software Advice](#) provides an overview and comparison of other Architecture Accounting Software with filters to fit your firm scale and software needs.

Financial Courses

- [Kauffman FastTrac](#)
An immersive online course designed to provide information, tips, exercises and tools to help you think about your business idea. In addition, some in-person courses are suggested with other providers around the nation.
- [PSMJ or Professional Services Management Journal](#)
Offers educational programs on architecture and engineering business management.
- [Deltek Resource Center](#) offers on-demand webinars and other media assets.

This information is provided as a member service and neither the Authors nor the AIA Trust are rendering legal or financial advice. Members should seek the advice of financial professionals to advise the member on proper financial management practices.