

# Micro Firm Sales Playbook with AI

**Turn early feasibility into your most powerful sales tool**

*A step-by-step guide for small architecture firms to win more work, build client trust, and scale impact with AI.*

presented by  
**tf TESTFIT**

# Why This Playbook?

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**60% of U.S. architecture firms have fewer than 4 people ([AIA 2024 Firm Survey Report](#))** These micro firms often face the same challenge: how do you win projects without sinking weeks of non-billable hours into feasibility studies? Larger firms can absorb the risk, but lean teams can't.

Today, AI is creating new opportunities for architects to branch out on their own, serve clients directly, and build sustainable practices without the overhead of a traditional large firm.

This playbook shows how architects can reframe early feasibility work as a repeatable sales tool—and use AI to make it fast, transparent, and scalable.



# Step 1. Productize a 60-Minute Feasibility Session

## The Challenge

Early feasibility often eats up 20–30 hours of unpaid work. For a two-person team, that's unsustainable.

## Playbook Move

Package feasibility into a structured 60-minute client session that speaks to both the design potential and financial feasibility.

- **Before session:** Prep parcels, zoning, and topo data in a real-time AI tool.
- **In session:** Co-create 2–3 scenarios live, showing not only layouts but also unit yields, parking counts, coverage ratios, and other deal-critical numbers. Narrate the trade-offs in real time so clients see you understand what drives return.
- **After:** Send a one-page summary with findings, preferred option, and next

## Example

*Motif Architects* in Austin, Texas reimaged feasibility as a 60-minute live session using TestFit. Instead of burning 30 hours, they spin multiple options while showing unit counts and yield calculations as they update. Clients walk away knowing the numbers add up, and Motif leaves with a signed project—not sunk costs.



Motif Architects - Flex Industrial siteplan in TestFit



"We couldn't offer this a year ago, before we used TestFit. Now it's our standard—and it wins projects."

**Casey Johnson**  
Partner at Motif Architects



## Step 2. Turn Pre-Design into a Client Magnet

### The Challenge

Pursuits feel like a gamble; you spend hours preparing for projects you might never win.

### Playbook Move

Use AI to transform feasibility studies into a lead generator.

- **Offer multi-site test fits up front** for serious prospects
- **Gate with a short intake form** (goals, program, constraints) to filter out prospects.
- Brand it as a **“Site Readiness Check”** or **“Pre-Design Diagnostic.”**



AC Martin - Progress images from Schematic Design and Design Development

### Example

*AC Martin* uses TestFit to explore early-stage options quickly and share them with clients in the pursuit phase. By comparing scenarios up front, they've been able to demonstrate value faster and strengthen their position to win new work—without investing weeks of unpaid feasibility.

“Clients who experienced our initial TestFit session began specifically requesting a TestFit exercise first when they returned for another site.”

**Sami Khoury, AIA**  
Principal at AC Martin

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## Step 3. Lead with Transparency to Build Trust

### The Challenge

Clients lose confidence when they can't see the reasoning behind your recommendations.

### Playbook Move

Pull back the curtain and let them watch feasibility unfold.

- **Show live calculations** for parking, coverage, and yield update etc.
- **Use AI as a teaching tool** to explain “why” constraints matter.
- **Follow up with annotated reports** or a quick Loom walkthrough.

### Example

On a Michigan project, *Motif Architects* brought TestFit directly into client meetings. Adjusting unit counts and parking live gave first-time developers the “aha moments.” That transparency built trust and secured the job.



Motif Architects - E. Logan Street Multi-Family Site Study



“We love the aha moments. Clients suddenly understand the constraints and that transparency builds a lot of trust.”

**Casey Johnson**  
Partner at Motif Architects



## Step 4. Package Deliverables for Decisions, Not Drawings

### The Challenge

Clients don't need schematic sets at the feasibility stage; they need clarity to move forward.

### Playbook Move

Replace traditional schematic packages with a concise **Decision Brief**:

- Preferred scheme
- Site capacity and deal stats
- Key risks and constraints
- Recommended next steps



RBA Architects - TestFit aerial view of a townhome development

### Example

RBA Architects **won \$750k in fees** by using TestFit to evaluate the efficiency of the design right away. Their approach showed value early, helped clients commit faster, and protected profitability.

"We're actively marketing TestFit as our competitive advantage to win new projects, which has resulted in winning over \$750K in project fees."

**Tom Retnauer**

Partner at Motif Architects



## Step 5. Measure What Matters

### The Challenge

Most firms track billable hours but overlook their sales funnel metrics.

### Playbook Move

Treat feasibility as a measurable revenue engine. Track:

- **Time-to-proposal:** Did you cut 30 hours down to 1?
- **Close rate:** How many feasibility sessions convert to contracts?
- **“No-go” saves:** How many risky sites did you filter out early?
- **Client satisfaction:** Are revision cycles shrinking?

### Example

Ware Malcomb reduced feasibility from weeks to hours, **saving \$200k-\$300k in non-billable time.** That efficiency allowed them to pursue more deals and gave leadership a clear ROI story.



Ware Malcomb - Multi-Family site plan in 3D with context massing



“Now we can do this at very little cost to ourselves because it only takes 1/3 of the time to do a site plan in TestFit.”

#### Grant Brandenburg

Director of Regional  
Operations at Ware Malcomb

**WARE MALCOMB**

# Scaling Impact Without Scaling Headcount

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For micro architecture firms, winning work has always been the hardest part. Traditional pursuits demand weeks of unpaid feasibility—time you can't afford to give away.

This sales playbook flips that equation. By productizing feasibility sessions, turning pre-work into a client magnet, leading with transparency, packaging decision briefs, and measuring results, micro firms can turn their riskiest phase into their biggest growth driver.

## The result:

- **Win more projects** without more sunk costs.
- **Build stronger client relationships** through trust and clarity.
- **Compete with larger firms** on speed and value, not size.

Smaller doesn't have to mean slower. Micro firms that embrace AI are proving they can win bigger projects, deliver more value, and grow without hiring.

## Ready to Build Your Playbook?

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If you're running a lean team, the opportunity is clear: you don't need to scale your staff to scale your impact. You just need the right tools.

[Use TestFit](#) to start building your own AI-powered sales playbook.