



Scaling capital planning as a service

A practitioner's playbook for engineering consultants building repeatable, platform-enabled capital planning services for water and wastewater utilities.



The way capital planning services are delivered is changing

If you run a water or wastewater practice at an engineering consulting firm, you've seen this pattern: a utility commissions a capital improvement planning study. Your team delivers it. The plan is accepted, filed, and within 18 months it starts aging. Three to five years later, the utility needs a new study, and the process starts over.

This model works, but it has a ceiling. It limits how many clients you can serve at a given throughput. It creates revenue volatility tied to study cycles rather than ongoing service relationships. It means that every engagement requires rebuilding context that should have persisted. And increasingly, it leaves your clients with a plan that doesn't hold up to the scrutiny they're facing.

The utilities that are your strongest clients are under more pressure than ever: from regulators, rate-scrutinizing boards, and the financial reality of aging infrastructure. They don't just want a better stud, they want a planning partner. They want a team that helps them maintain a living capital planning environment.

This playbook is for engineering practice leaders, service line owners, and asset management directors considering **business transformation**.

It focuses on supporting expertise with the right digital tools and aligning the business model with value delivered.

The opportunity is to shift from project-based delivery to a **recurring, platform-enabled service model**.



The business case for change

The traditional capital planning engagement model has three structural limitations that compound over time.



Revenue tied to study cycles

Capital planning engagements are episodic. A multi-year CIP study produces revenue during the engagement and then generates nothing until the client decides it needs an update. This creates lumpy revenue profiles, unpredictable utilization, and ongoing rebidding effort that consumes resources without building lasting value.



Margin compressed by manual processes

The workflows that underpin most capital planning engagements—exporting GIS data, reconciling inspection records, rebuilding risk models in spreadsheets, formatting deliverables—are labor-intensive and don't scale. As client programs grow or regulatory requirements increase, serving them requires more hours, not just more expertise.



Inconsistency across offices and clients

For multi-office firms, one of the most persistent challenges is delivering consistent quality and methodology across geographies. When each office uses its own tools and workflows, the result is variation in how risk is scored, how priorities are ranked, and how results are documented. This creates client perception gaps, limits your ability to leverage work across engagements, and makes it harder to build institutional expertise.

“While many water systems across North America have exceeded their design lives, this is our moment to transition from reactive repairs to proactive asset management, rehabilitation, and replacement.”

Heather Collins
AWWA president
AWWA 2025 *State of the Water Industry Report* Press Release





What your utility clients are asking for now

Most utilities with mid-to-large municipal water and wastewater systems with active capital programs and real regulatory exposure have outgrown the static study model. **They know it, even if they haven't articulated it exactly.**

01 Their plans become outdated faster than they're updated

Conditions change and budgets shift, yet capital plans reflect last year's model.

03 They're building internal capacity, but slowly

Many utilities want to reduce their dependence on periodic consulting studies, but they don't have the tools or the institutional knowledge to maintain living plans on their own.

02 They face scrutiny they can't fully document

Boards, regulators, and rate proceedings increasingly require traceable rationale.

04 They want continuity across the planning cycle

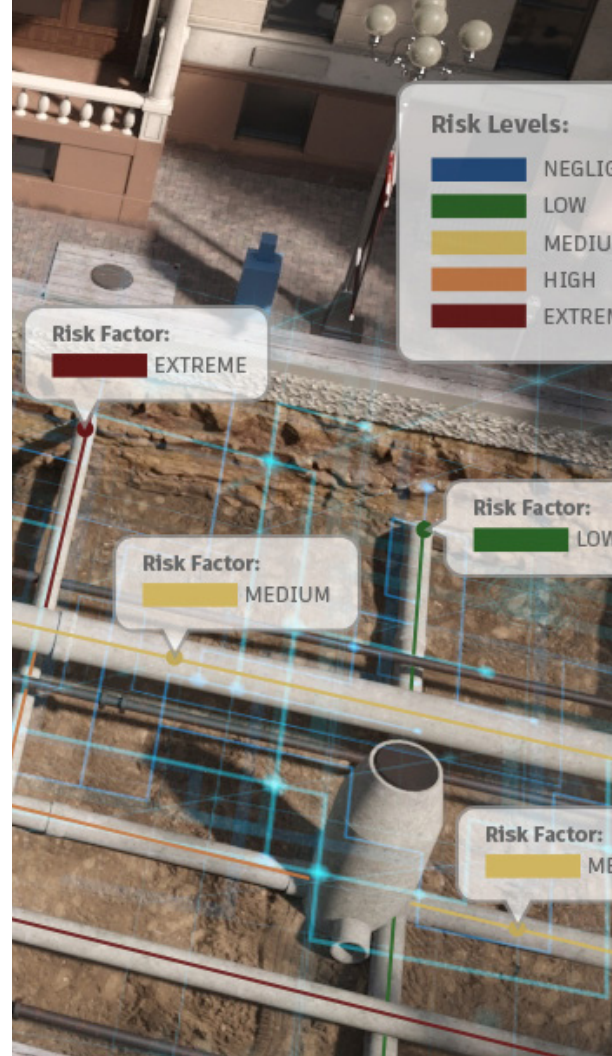
When a consulting engagement ends and the next one begins, knowledge is lost, data has to be rebuilt, and context has to be re-established.

DEFINITION

What is a platform-enabled approach?

A platform-enabled approach means delivering capital planning services through a connected, cloud-based environment rather than a series of standalone study engagements. Instead of rebuilding models, reconciling data, and reformatting deliverables from scratch each contract cycle, your team works from a persistent environment that retains the methodology, asset data, and planning history of each client account continuously.

The platform doesn't replace the consultant's expertise, it gives that expertise a place to live between engagements, so the intelligence built through each client relationship compounds over time rather than resetting at contract end.



Dimension	Traditional consulting model	Platform-enabled service model
Revenue model	Episodic revenue tied to study cycles	Recurring revenue from ongoing planning support
Data continuity	Rebuilt each engagement requiring manual reconciliation	Persistent and continuously updated
Risk methodology	Varies by project team and engagement	Standardized across all clients and offices
Client visibility	Deliverable-based; client sees the results, not the process	Shared cloud environment; client engaged throughout
Scalability	More clients = more staff; margins are compressed	More clients = more data leverage; margins improve
Defensibility support	Study snapshot; outdated by next board presentation	Living plan; current data available on demand
Team continuity	Knowledge resets at contract end	Environment persists; institutional knowledge retained

What a platform-enabled delivery model looks like

Moving to a platform-enabled capital planning service doesn't require reinventing your practice. It requires **connecting the expertise you already have to an environment that makes it persistent, scalable, and continuously valuable to your clients.**

Five defining characteristics	
01 Standardized risk methodology across client accounts	Consistent risk frameworks are essential for scalable capital planning. Standardizing criteria for likelihood and consequence ensures uniformity across all teams and projects. While client needs differ, the methodology for asset scoring, prioritization, and scenario modeling should be clear and accessible to all team members.
02 Connected data environment for each account	A platform-enabled engagement gives both your team and clients access to integrated GIS, inspection data, and capital modeling in one environment, eliminating time-consuming manual data reconciliation. Data updates flow directly into risk scores and capital priorities. For your team, this means less time managing data and more focus on analysis and advising. For your client, it ensures planning tools reflect up-to-date conditions.
03 Client access and transparency built in	A platform-enabled service strengthens client relationships by allowing clients to view the planning environment, not just the deliverable. This builds trust, clarifies methodology, and enables real-time responses to leadership or board queries. Transparency also minimizes scope creep from ad hoc requests, as an always-current environment helps resolve these issues efficiently.
04 Renewal built into the service structure	Successful platform-based consulting uses multi-year agreements with defined scope: data integration, model updates, scenario support for board and regulatory needs, and annual planning facilitation. This approach offers predictable value for both your practice and your clients compared to one-off studies.
05 Scalability without headcount growth	Traditionally, scaling capital planning services means hiring more senior staff, as client load is tied to billable hours. A platform-enabled model changes this: by automating data integration, risk scoring, and updates, senior engineers can focus on high-level tasks like strategy and regulatory support. The platform boosts throughput, allowing judgment-based work to scale independently.

How leading consulting firms are making the shift

Engineering firms that manage capital planning and asset management programs for municipal clients are already using connected platforms to change how they deliver services, and how they grow.

Engineer-on-call programs

Engineer-on-call programs are one of the highest-value service delivery models in the municipal market, and one of the most difficult to execute well with traditional tools. The program requires your team to be responsive, current, and consistent across a client relationship that spans years and dozens of projects.

A platform-enabled approach changes the structure of these programs. Rather than treating each task order as a standalone engagement, your team maintains a living planning environment for the client. When a task order comes in, the context already exists. Your team can respond immediately with current data, not reconstructed assumptions.

The client experience is fundamentally different. Instead of waiting for your team to 'get back up to speed' on their system, they're **working with a partner who knows their infrastructure as well as their own internal team – because the environment retains that institutional knowledge continuously.**

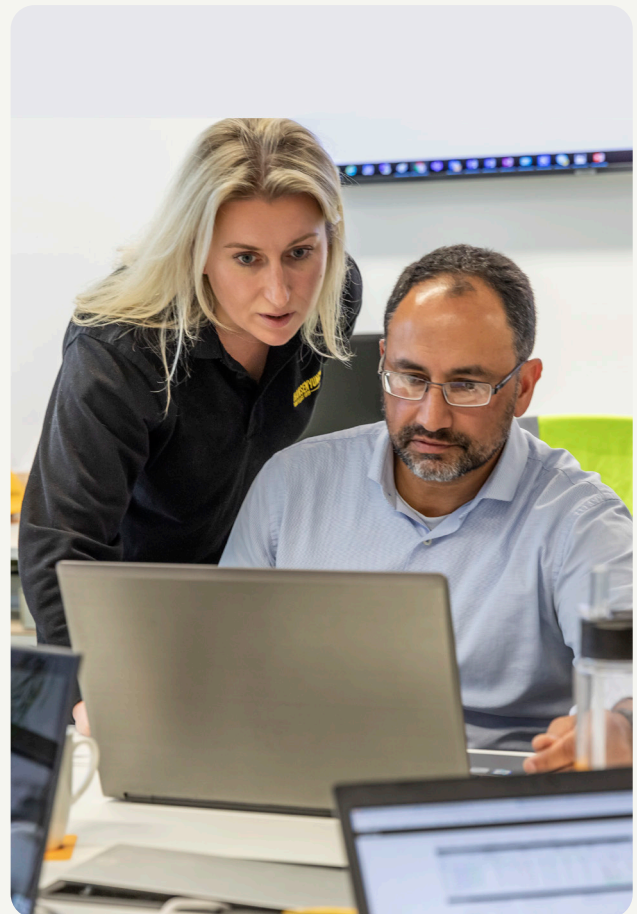


GHD and Aqua Pennsylvania: Scaling across 50+ systems

The challenge of serving a utility operating more than 50 wastewater systems across 32 counties is exactly the kind of complexity that exposes the limits of traditional consulting delivery. Managing capital planning across dozens of systems with different infrastructure profiles, inspection histories, and regulatory contexts requires both scale and consistency.

Using a cloud-enabled platform solution, GHD was able to centralize inspection and GIS data for capital planning across all of Aqua Pennsylvania's systems, enabling program-level analysis at the state and regional level while maintaining asset-level decision support for each individual system. The result is a capital planning service that GHD can maintain and evolve over time, rather than periodically reconstruct.

[Read the full story →](#)





Bonton Associates: Technology is their key differentiator

Bonton Associates built their practice around a straightforward conviction: that technology is the equalizer that allows a smaller firm to deliver the depth of service typically associated with much larger ones. Many of the Louisiana municipalities they serve lack the internal staff and tax base to fund capital programs without federal support. Bonton Associates leans on digital tools to upload historical inspection data, build risk models collaboratively with client teams, and generate the documented, traceable rationale needed to compete for grants and satisfy regulatory oversight.

The result is a service model that doesn't end when the study is delivered. By maintaining a connected planning environment for each client, Bonton's team can respond to new inspection findings, update priorities, and produce board-ready documentation at any point in the planning cycle. For smaller municipalities, that continuity is the difference between a capital program that holds up under scrutiny and one that doesn't.

[Read the full story →](#)



“One of our core values as a company is technology. As we compete for projects, oftentimes capacity and firm size is seen as a proxy for quality and responsiveness. Our philosophy is that bigger is not necessarily better. Early on, we saw technology as the equalizer that allows us to scale our services so that we can deliver more value with a smaller firm.”

Darius Bonton, P.E., MBA
President & CEO
Bonton Associates

Building an internal business case

What leadership needs to see

For most consulting practices changing delivery models requires an internal investment decision in technology, training, and in organizational change management.

Executive sponsorship for a platform implementation typically requires three things:

1. **A clear revenue model** showing the recurring revenue opportunity
2. **A margin analysis** demonstrating the efficiency gains from reduced data management overhead
3. **A differentiation narrative** explaining why this model wins clients and retains them.



How to frame the case

Revenue opportunity

Map your current capital planning revenue by client and engagement type. Calculate the annual revenue equivalent of converting those relationships into ongoing service agreements.

Margin opportunity

Estimate the hours consumed by data management in capital planning engagements: GIS exports, data reconciliation, spreadsheet rebuilds, deliverable formatting, etc. Shift the hours recovered from this work to higher-margin advisory and analysis work.

Competitive differentiation

As utility clients become more sophisticated about capital planning expectations, the ability to offer a connected, continuously updated planning environment becomes a competitive differentiator in procurement processes.

Growth opportunity

Each new client account built on the same platform adds revenue without proportionally adding overhead. Each additional system a client brings to the platform strengthens the relationship and the service economics, creating a growth strategy that compounds over time.

Your tool to winning the next decade

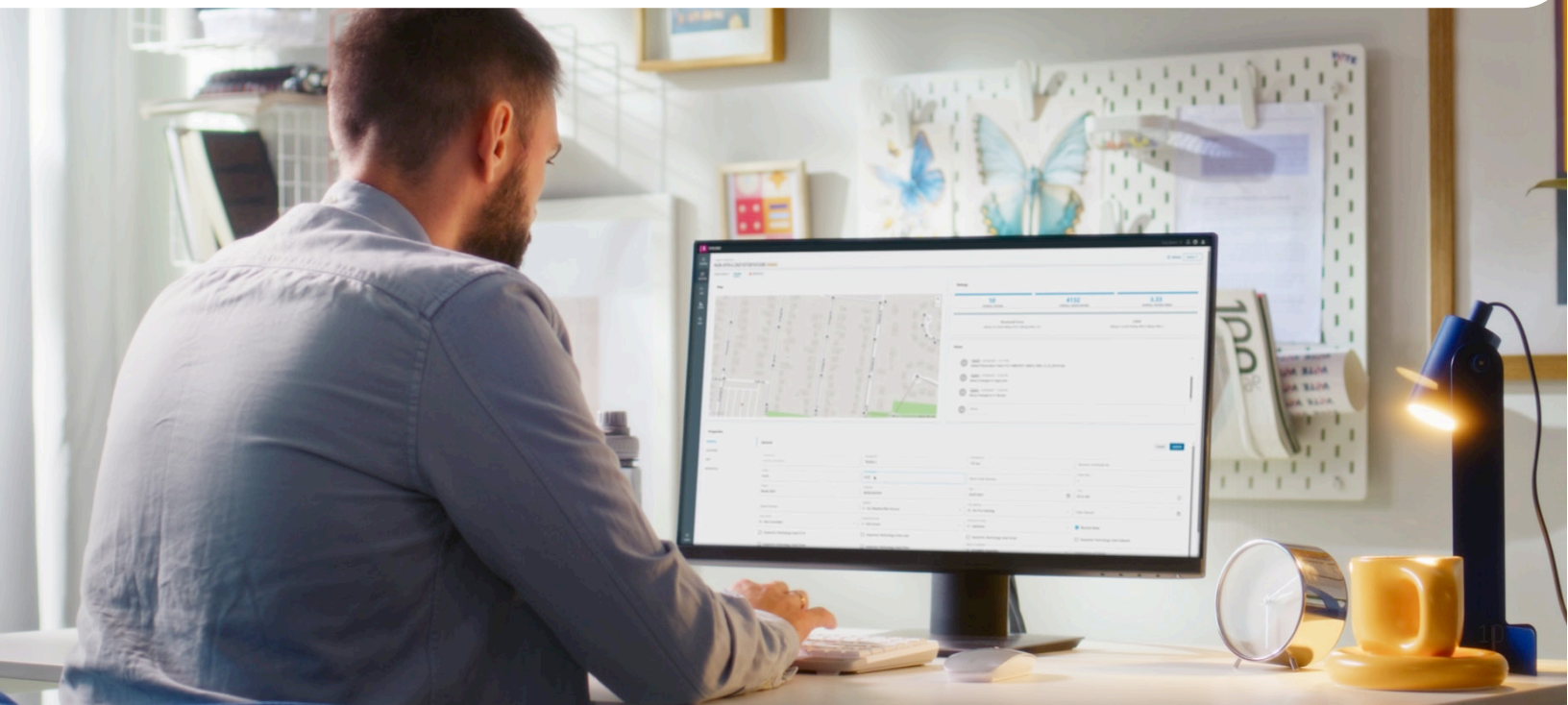
Scalable, cloud-based asset management

The demand for defensible, continuously updated capital planning is growing. The consulting firms positioned to meet that demand are the ones building platform-enabled delivery into their practice now, before it becomes the expected standard.

Info360 Asset is the connected environment that makes that possible. It centralizes inspection data, applies dynamic risk modeling, and gives your team and your clients a shared planning environment that stays current, stays accessible, and stays defensible—across every account, every office, and every planning cycle.

What leading firms are doing with Info360 Asset:

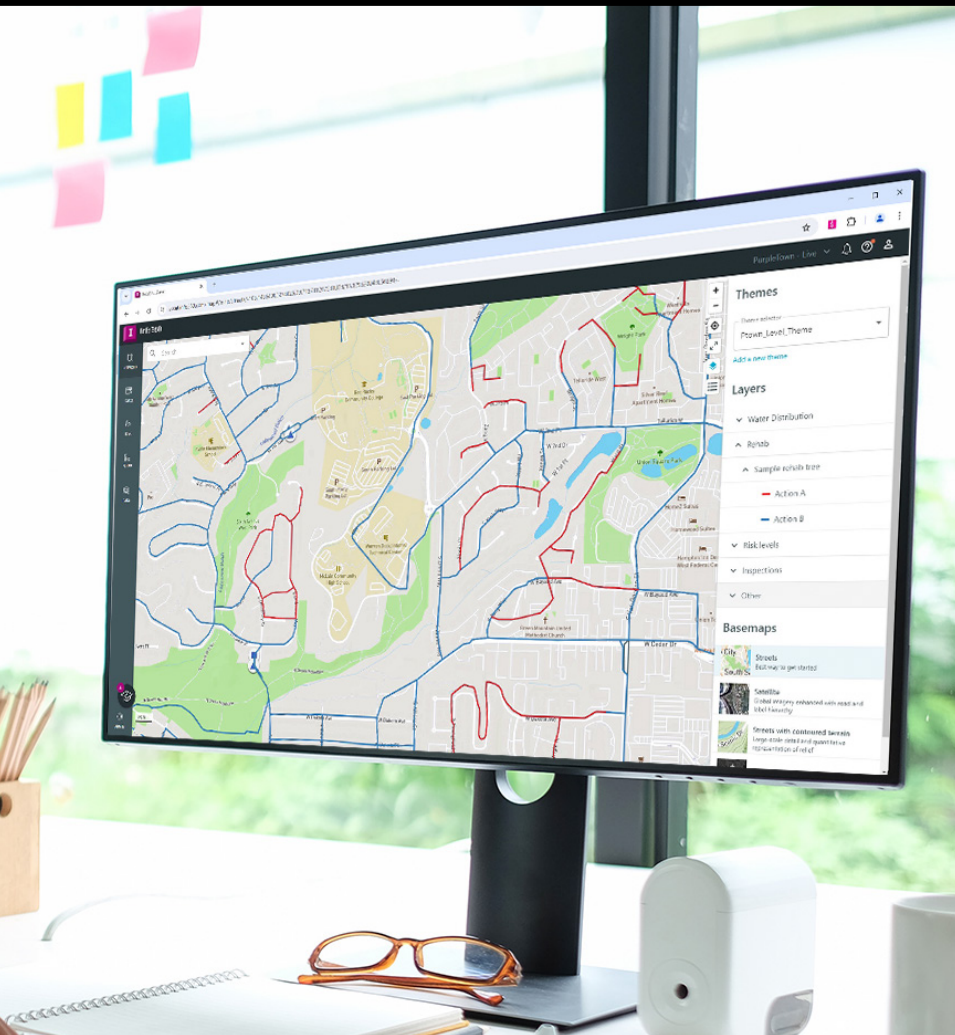
- Standardizing risk methodology and capital prioritization across multiple client accounts
- Maintaining living planning environments that persist between contract cycles
- Delivering board-ready documentation and regulatory submissions without rebuilding from scratch
- Scaling capital planning services without proportional growth in headcount or overhead



Ready to build a platform-enabled practice?

Talk to our team about how Info360 Asset supports consulting firms delivering capital planning, asset management, and engineer-on-call services for water and wastewater municipal clients.

Visit www.autodesk.com/info360-asset to learn more.



Streamline workflows and eliminate data silos with platform integrations

Connect your asset data with Info360 platform integrations. Bring your systems together to streamline workflows, improve collaboration, and support faster, more confident decision-making.

Key integration partners:





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