

# BizTrak™

March 25, 2025 8-5:30

MSA

5032 Rouse Dr #200

Virginia Beach, VA 23462

**The Designer's Path to Project Management:  
Essential Business Skills**



## Empowering Tomorrow's A|E Leaders

**BizTrak**

The Designer's Path to Project Management: Essential Business Skills

Welcome to BizTrak, where we empower future leaders in architecture and engineering through tailored training in operations, project management, and leadership. Our programs equip emerging leaders with essential skills, fostering individual growth and a clearer path forward in the industry. Join us in shaping the future of A|E leadership.

**REGISTER BELOW** ↓



8 hours for only \$350

See similar on AMA or ACEC for \$1,200+

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[www.sdamidatlantic.org](http://www.sdamidatlantic.org)

Building Business: Operations Essentials for Design Professionals  
Plus: Our BizTrak™ Toolkit (see page 4 for details)

## The Designer's Path to Project Management: Essential Business Skills

### Your immediate takeaways

- Recognize the importance of marketing
- Learn to profitably execute the project while managing risk
- Leverage your new financial and business skills to to successfully move to project manager.

In today's dynamic professional landscape, architects and engineers must recognize that technical skills alone are no longer sufficient for success. Economic cycles—with their unpredictable upswings and challenging downturns—demand a sophisticated understanding of business strategy that goes far beyond traditional design and engineering expertise.

### How You'll Benefit

- Don't leave to chance learning vital PM skills
- Learn and apply different skills for success
- Generate new ideas to elevate your team processes
- Know when to embrace necessary risk and how you may be (or not) protected
- Learn scheduling and estimating theory



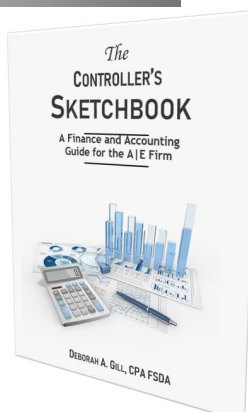
### Your Facilitator

Deborah A Gill, CPA FSDA, Hon. AIAHRC

Deborah has 40 years experience in both large and small A|E, design|build, and land surveying firms in all aspects of finance, operations, and strategy. Previous positions include CFO|CSO at

Precision Measurements, Controller and Director of Business Operations at Clark Nexsen, and owner of Profit by Design, a consulting firm with over 100 clients in the A|E industry. She has worked on her goal of improving A|E practice management skills throughout her career and provided seminars for AIA, NSPE, IFMA, NSPS, VAS, and SDA.

Her resource book, *The Controller's Sketchbook, a Finance and Accounting Guide for the A|E Firm*, is available for purchase. All profits benefit the SDAPPC Foundation.



### Who Should Attend?

Architects | Engineers who want better business insights into the world of project management

### What You'll Cover

- ✓ Mastering Practice Management section of the ARE exam with more business-driven preparation.
- ✓ Distinguishing between business development, marketing, and client relations in the A|E industry.
- ✓ Learning project management's financial dimensions—estimating, negotiations, and budgets.
- ✓ Developing robust financial and practice management skills for this industry.

By developing these critical skills, architects and engineers can help build firms that don't just survive market fluctuations, but actually thrive through them—turning potential challenges into opportunities for growth and innovation.

Contribute to your own growth and success faster.

### BizOps Personnel who

- ✓ Are new to the A|E industry
- ✓ Want sit for the SDA's Certificate in Design Firm Operations (CDFO®)
- ✓ Want to know more about the project management side of the firm

### What You'll Gain

- ✓ An overview of the project delivery system in the A|E industry, the complexity of A|E finances, and the watch points in a firm delivering professional services.
- ✓ A perfect prep class for the Certificate in Design Firm Operations (CDFO®) credential.

Don't leave it to osmosis or your Project Manager to teach you these vital business skills.

# Agenda: what you should expect to learn in this powerful one-day seminar

8:00 — 8:30 Continental Breakfast — Registration

8:30—9:45 Firm Marketing — How to develop your marketing strategy

*How does your firm choose the projects it pursues? What is the role of the project manager not only in marketing, but more importantly in the management of client relationships. On the flipside we will discuss client selection, the appropriate fee type given the work, and the parts of the RFP and contract the PM is ultimately responsible for. Go/No-Go Process & Managing Client Relationships. Client Selection, Project Delivery Methods, Fee Types, Top Down | Bottom Up Fee Preparation, Contract Management Principles*

10:00—12:00 Project & Practice Management I

*Back to the basics with an overview of the principles and codes the accounting and management worlds live by and the crucial concept of indirect and direct expenses and how they serve as the basis for bill rates, fees, and which ones the PM has control over. Principles & Basics of Accounting, Indirect vs Direct Expenses, Overhead. Unpacking a negotiated fee into a budget. Work breakdown structure, Scope | Fee | Scheduling. Critical Path Method Scheduling Basics.*

12:00—1:00 Lunch — Leadership Roundtable

1:00—2:00 Project & Practice Management II

*Understanding Financial Statements. how to read them and how they're connected. Moving the project into the working phase and what's available to help you monitor it, — like the lowly timesheet. Financial Statements: Balance Sheet, Profit & Loss, Overhead Statement. Monitoring the Budget, Working with Consultants, Earned Value Management, KPIs*

2:00—3:30 Risk Management and Cashflow

*Cash is king — here's why. We're discussing Risk Management from both sides — practice and project management. Cash flow, Working Capital, Financial Metrics, Risk & Conflict Management. Risk Management & Professional Liability Insurance*

3:30—5:00 Operations

*General Practice Management topics you shouldn't be without if you're going to start your own firm or show you're ready to move into management. On the project side we'll work on outcomes — successes & failures — and the reasons, like staffing and scope creep. Business Entities, Banking, General Insurance, Working with the Government. Budget results, Reports, Variances. How to improve outcomes.*

5:00—5:30 Final Q&A — Apply your knowledge

*We ask and answer your Practice Management questions with real life scenarios.*

***The SDA's mission is to pursue excellence in A/E Practice Management, and it understands that empowering design and business professionals in business management through BizOps education aids the individual on their career path and benefits their firm.***



## Optimize your Operations

Connecting the professional and the firm to A|E operations expertise and resources

**The Firm** If your firm has ever wanted to improve its business practices, hire and retain business professionals with industry specific skills and experience, and find solutions to advance your design firm, SDA can facilitate that goal.

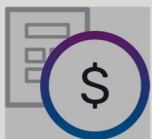
- ◆ SDA's career center can help you find credentialed and accomplished business professionals who will positively impact your firm.
- ◆ SDA's education programs instill best practices throughout the entire firm. Designed to keep staff in step with the current best practices in our industry, they can apply them on the job to improve workflow at your firm and improve the bottom line.

### Education

- ◆ **EDSymposium** A 3-day conference that provides 18 hours of continuing education, tours, networking and enrichment opportunities
- ◆ **EDConnect** A multiple-day virtual conference to participate in from your desk with the entire office for one single connection fee. 15 hours of educational topics specific to the management of the A/E firm
- ◆ **Webinars** Monthly chapter webinars with nationally renowned A|E and other practice management experts

### Certification for BizOps Personnel

**CDFO program** — The Certificate in Design Firm Operations credential is an excellent way for A|E BizOps personnel to gain the expertise needed to manage an A|E firm in all of its focus areas. It also sets the individual apart from other BizOps personnel, demonstrating a commitment to design firm management and the industry.



Finance



Operations



Project Mgmt



Marketing



HR



Leadership

### BizTrak™ Toolkit:

- ✓ Industry Key Performance Indicators (KPIs) — 10 year Comparison
- ✓ Business Entities — Comparison table of all types (C Corp, S Corp, LLC, & Partnership)
- ✓ Business Insurance — Common A|E insurances with definitions
- ✓ Case Study — Financial statements: Balance Sheet, Income Statement, Overhead Statement, Cashflow Statement, and Statement of Retained Earnings
- ✓ Worksheets, Templates, and Guidelines on
  - ◆ Top-down and Bottom-up Estimating, Negotiating, and Budgeting
  - ◆ Calculation of daily wage rates & average man-hour rates — Add more value to your pricing
  - ◆ Overhead calculations — Low overhead doesn't mean high profits
  - ◆ Additional Services excluded from Basic Services — Our list avoids scope creep
  - ◆ Project Management Scheduling Tool — Understand scheduling theory