

# 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.***