



# TEN WAYS

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## TO STAY OUT OF FINANCIAL/BUSINESS TROUBLE

*wisely obtaining & managing projects*

### Who should attend?

- ◆ Engineers & Architects
- ◆ Future Project Managers
- ◆ New Project Managers
- ◆ Experienced Project Managers
- ◆ Those who want to improve their project management skills

### Approach:

- ◆ Recommended 2-day program
- ◆ Will customize & personalize session to fit specifically with your procedures

## BENEFITS

Develops a process, mindset and comfort level with project management that enables participants to better meet the needs of clients. Addresses needs of project people, clients and company profitability. Illustrates how successful relationships begin before the start of a project and continue on well after the finish. Concentrates on the who, what, when, where, why and how of performing on time and on budget. This training program will arm participants with the proper skills to assess and win work, improve pricing, communicate with clients and peers, start projects on the right foot, track and report project progress, timely bill and collect, complete changes while building relationships with clients and successfully manage all size projects.

Numerous real-life experiences and case studies are used to teach and bring to light the principles taught. Sessions are highly interactive with active learning occurring throughout.

## SESSION COVERS SUCH TOPICS AS:

- Meet your needs, meet your customer's needs
- Assess the compatibility of projects & customers with your firm's business strategy
- Become comfortable discussing \$
- Arm your company with methods to sell your pricing
- Increase company profit and cash flow
- Protect your firm with contract & insurance issues
- Easily complete billing & collecting
- Understand project financial reporting
- Obtain acceptance of changes
- Successfully manage small & large projects
- Learn by doing – case studies & exercises

## OUTLINE

Sessions are developed to meet the needs of the employees, clients and profitability

**Communications** – Studies, facts & findings, improving, perception gaps, ways to differentiate, exercises

**Go/No-Go Decision** – Where to obtain data, rewards & consequences, tools for better decisions, aligning with business strategy, case study

**Pricing Your Services** – Alternative methods, answering objections, negotiating, differentiating, project profitability, case study

**Contracting & Insurance** – Setting the stage for success, scope of work, deposits, retainers, addressing “pay when paid” & retainage clauses, case study

**Project Set-up** – The importance of properly setting up projects, tracking systems, schedules & other tools to properly manage the project

**Kick-off Meetings** – Key to a successful project & understanding client, address the who, what, when, where, why & how, case study

**Project Financial Management Systems** – Successfully using your system, revenue & cost recognition triggers, reading & understanding financial reports, role of computer systems, software alternatives, exercise

**Billing & Collecting** – Importance of cash, ways to accomplish painlessly, methods to maximize cash flow, issues affecting payment, case study

**Contract Changes** – Proactively managing, alleviating negative reactions, documenting, case study

**Project Appropriate Management** – How to manage small projects vs. large projects, exercise

## PARTICIPANTS COMMENTS

The course material and leader consistently receive excellent ratings. Representative comments received from participants are:

*“The course ties together the entire project process from marketing through performance in a very concise manner.”*

*“Covered real life conditions of consulting services (and clearly identifies how to address some real issues in our business).”*

*“Extremely valid & useful information that can be readily applied with the assurance that the implementation of ideas will result in positive change.”*

*“Raising awareness of engineers as a business. To be successful, we must not only strive to be good technically, but have business savvy as well.”*

*“Directly addressed central issues, problems of consulting as a business, leading to more profitable & more enjoyable work & career.”*

*“This is one of the best training courses I have attended in all industry (approximately 20 years).”*

*“Mr. James managed to keep the discussions lively and did a great job presenting material that could easily have otherwise been dry. I have been a PM for approx. 11 years & I came away from the course with several (a lot) of new ideas/things to try.”*

*“Most of us are good technically. This course helped tremendously in making us good from a business point of view. Lee James clearly knows the subject. Unlike many trainers, he has “walked the walk” so he can convincingly “talk the talk.” A particular strength was his ability to bring questions & comments from the group to illustrate the big points without going over time.”*

*“Lee is a very dynamic presenter. It was refreshing to see that he has considerable experience in our field, rather than coming from an entirely different industry.”*

## INSTRUCTOR

Lee has worked with engineers, architects and contractors for the last 30 years. Training and teaching have been a part of Lee's career for the past 35 years. Lee develops and teaches training courses throughout the U.S. He is an enthusiastic and energetic trainer who keeps your attention. Numerous case studies and exercises are used to embed the principles taught.

Lee is active in several engineering professional societies and is continually promoting good business practices through authoring articles and completing training sessions. He was Vice President for an international engineering consulting firm and worked daily with projects, project managers and clients in addressing change issues and negotiating mutually beneficial solutions. Previously, Lee worked with Ernst & Young as a project manager and trainer and as the Chief Financial Officer for a computer software engineering firm.

Lee now does similar work with his firm. He constantly experiences the challenges of fulfilling changing project needs; as well as financial and business needs. Consulting, training and ownership transfer projects are continually in process. Lee has successfully put into practice all the principles he teaches in this program.

## ON-SITE TRAINING & FLEXIBILITY

The program is designed to be flexible with regard to format, timeframe and location. The program is divided into modules and deal with specific problems and their solutions. The curriculum is developed so that organizations wanting sessions dealing with specific problems are accommodated. We can customize the program to include your company's specific documentation, systems design as well as policies and procedures.

Due to the interactive nature of these sessions, class sizes of less than 30 people are recommended.

A Participant Manual, handouts and reference materials are provided for use throughout the sessions and after completion.

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For more information, please visit our website, email or call us:

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