



Dedicated to Improving Your Bottom Line
LEE JAMES & ASSOCIATES

Customizing & Personalizing

Each of these programs can be customized & personalized to include the specifics of your individual company such as:

Ten Ways & Project Financial Management Programs

- GO/NO-GO Evaluation Forms
- Contracting Policy
- Example Contract
- Expense Report & Instructions
- Project Financial Reports
- Invoicing Alternatives
- Accounts Receivable Aging
- Reporting Time Worked Policy
- Utilization Goals
- Recording of Internal Costs
- Timing of Reports
- Accounts Receivable Turnover Goal
- Standard Fee Schedule Format
- Contract Summary Descriptions
- Time Sheet & Instructions
- Project Set-up Documents
- Billing Sheets
- Invoice Documentation Alternatives
- Comp Time Policy
- Reporting of Travel Time
- Recording of Subcontractor Costs
- Purchase Order System
- PM Job Costing Software Used
- Change Order Formats

Confidently Managing Changes

- Company Policies & Procedures
- Modifying Exercises
- Change Formats & Documents
- Lessons Learned & Experiences

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

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Customizing & Personalizing (cont.)

Understanding Financial Performance

- Financial Statements
- Finance & Accounting Procedures
- Dun & Bradstreet Reporting
- Plan vs. Actual Performance
- Costs of Operating Business
- Profit Goals
- Financing Loan Covenants
- DCAA Overhead Rates
- Annual Financial Plan
- Breakdown of \$1.00 of Revenue
- Fringe Benefit Costs
- Ratios Used to Manage Business

Win/Win Negotiating

- Company Policies & Procedures
- Lessons Learned & Experiences
- Modify Mock Negotiations

Winning Interviews & Presentations

- Company Policies & Procedures
- Lessons Learned & Experiences
- Modify Mock Interviews/Presentations

