

BUSINESS MANAGEMENT PROGRAMS – CHAPTER LEVEL CHAPTER EDUCATION PROGRAMS

4 Challenges Emerging Leaders Are Struggling to Overcome – DeWayne Ables

- How to lead at work and at home without sacrificing one for the other
- How to maximize the potential of the people on their team
- Decisions needed leaders to lead their teams through 2023

7 Critical Decisions To Maximize Your Team & New Opportunities – DeWayne Ables

Needs of markets & owners are radically changing. Industry sectors & geographic markets are extremely volatile. The need for construction teams and new holistic solutions are critical. However, developing teams, choosing & eliminating markets, and accurately delivering projects is more complex than our current teams are prepared for.

In this interactive workshop, leaders will be equipped with an evaluation tool to evaluate their team & partners on how well they are making & implementing 7 decisions to optimize the triple bottom line.

- Be given insights and tools to make 7 critical, strategic decisions to maximize the potential & success of your organization or team in 2023.
- Be given economic insights on the key drivers to leverage and industry sectors to pursue and / or eliminate
- Be equipped to immediately interview existing clients and prospects
- Evaluate how well their current team is performing in key practice areas
- Launch teams into 2023 prepared & equipped to reach the triple bottom line & start a movement.

Advanced Enterprise Budgeting and Forecasting – Maxim Consulting

It is critical for your organization to have budgets to create transparency and accountability for the multiple business units when it comes to their profit and loss. In this session, we will discuss the foundations of planning, budgeting and forecasting in order to create the metrics desired to have predictable profit outcomes.

In this session we will:

- Discuss the alignment required via organizational strategy definition
- Outline planning required by the different business units utilizing a bottom up approach
- List the budgeting techniques to create clarify behind departmental goals and expenses
- Show the forecasting required to predict and quantify department and company profit and loss early
- Show the type of metrics desired to view performance at any given time

Advanced Sheet Metal Estimating – Kevin Dougherty

This program will help estimators to think differently about the estimating process. Estimators will learn not to look at the estimate as a number, but more as a process from job inception to job completion. Topics to be covered include: customer types, the pre-bid qualification process, what foreman and superintendents say about the best estimators, contracts, various project options, how to protect your company's interest, internal communication, job kick-off meetings, scheduling and general conditions, traps and snares and opportunities. Attendees will also participate in a case study. (Note: Chapters can combine the Advanced Sheet Metal Estimating program with the SMACNA Reference Manual for Labor Units to make an interesting application into how to use the new reference manual for labor units).

Balancing the Portfolio – Creating a High-Performance Service Group – Maxim Consulting

Having a service and special projects group to help balance the portfolio can create additional financial stability to an otherwise fluctuating industry. During this session, we will discuss the life cycle of the service business. We will discuss how to define the business model to ensure proper viability of target environment. From there, we will then discuss the entire workflow ranging from dispatch, technology implementation, billing and collections best practices, and customer management.

In this session, we will:

- Outline the strategy of defining the business
- Define the structure required to begin and scale the group
- Discuss business processes required for success
- List the business development alternatives
- Create workflow to ensure trainability and scalability
- Discuss technology requirements to speed cash flow and provide transparency in performance

Change Order Management – Maxim Consulting

Effective change order management can dramatically reduce a subcontractor's risk and increase profitability. This four-hour interactive course explores the change order process from a subcontractor's viewpoint and provides participants with hands on training in recognizing, scoping, pricing, and negotiating change orders. This course culminates in a mock negotiation where participants can immediately practice the skills that they have learned.

Learning Objectives:

- Learn how to identify and categorize potential change orders
- Review contract terms and conditions that affect the change order process
- Understand how to price direct and indirect costs
- Learn how to identify and quantify impact costs
- Learn best practices for change order documentation
- Learn techniques for effective change order negotiation

ChatGPT: How to use it as a Communications Power Tool – Rebecca Klein Scott and Keith Scott
Artificial Intelligence (AI). It's here to stay. In this interactive webinar, learn how to feed ChatGPT with the critical details to transform this powerful technology into an effective brainstorming assistant, a productivity booster, and a content creator to maximize your personal efficiency. Navigate the common pitfalls and prevent the ChatGPT from being used as a crutch. We will also discuss guidelines that your company can utilize as a springboard to put ChatGPT policies in place for your team.

Construction Contracts: Alternative Delivery Methods & Preconstruction Planning – Maxim Consulting

- **Alternative Delivery Methods:** This course provides a brief overview of alternative delivery methods for construction contracts and can serve as a primer for contractors interested in providing services to their clients outside of the traditional design-bid-build model. As clients move towards contracting methods that favor flexibility and shift risk towards the contractors, it is imperative that contractors understand that their risk profiles change accordingly. Each method has its own distinguishing characteristics and challenges, and success is predicated on understanding the necessary resource commitments, pricing strategies, and the varying degrees of early contractor involvement.
- **Preconstruction Planning:** In the construction industry, project success is correlated with planning in schedule, cost, design, and other deliverables as defined by the project goals and requirements. Standardizing on that planning process will lead to predictability in resources, costs, and scheduling for each project. Smaller contractors generally leave project planning to the project manager or field superintendent, which will lead to variability in each project's approach to planning, as well as losing a significant opportunity to most effectively influence the outcome of the project. This program reviews strategies, standardized steps, and processes that lead to predictable project outcomes.

Effective Project Teams – Andy Patron

- **Performance Feedback:** Using Feedback to drive better performance
 - Job cost Feedback
 - Personal Feedback
- **Subcontractor and Supplier Relations:**
 - Examine the inherent conflict between general contractors and subcontractors, vendors and suppliers.
 - How can you overcome these obstacles to build a strong project team?
 - Review the procurement process to determine acceptable levels of risk with subcontractors?
 - Establish a proactive relationship with subcontractors to avoid project problems.

Five Steps to Maximizing Return on Investment – Bob Langdon

Sales are exploding, but cash flow problems are keeping you up at night! Higher profit is the key to a higher Return On Investment (ROI), but without adequate cash flow planning, **you will struggle to survive**. In this half-day program, Bob Langdon, author of *Managing Your Business for Profit*, will show you how to calculate return on investment for a closely held business and a five-step process for improving yours. You will learn how to simultaneously improve profit, cash flow and return on investment. And you'll return to your sheet metal business more competitive than ever with Bob's proven methods!

From Hello to Sold in Seven Steps – Bob Langdon

What are you doing differently now compared to three years ago? The truth is virtually nothing! Sales are up primary for one reason; the economy is booming. In an industry driven by the lowest bid gets the job; are you asking your customers the right questions? In this half-day program, Bob Langdon, author of *Managing Your Business for Profit*, will show you simple techniques to help you identify your most profitable customers and proven methods to help you generate more business from them. After attending this program, you'll return to your sheet metal business more competitive than ever with Bob's proven methods.

Increasing Engagement, Retention, and Development for Employees – Maxim Consulting

The workforce shortage is affecting both the revenue, and the margin, for the majority of contractors. The ability to hire, retain, engage, train, and develop employees increases the chances for them, and for the organization, to succeed. To accomplish this, specific processes and development paths must be created, implemented, and measured.

During this session we will:

- Discuss the need for roles and responsibilities definition
- Show the use of the role definition and time span needed to increase the percentage of "good" hires
- Describe the employee collaboration using skill set matrix information
- Outline the career path mapping process to create long term improvement and engagement

Discuss the link between performance management and incentive compensation

Job Cost Management & Establishing Overhead and Burden – Maxim Consulting

- **Job Cost Management:** Participants will learn how to properly set up a job cost management system that will be simple to use and provide useful and actionable information. Participants will also learn how project progress reporting impacts project and company performance. An in-depth excise will be used to demonstrate how to accurately determine project status including percentage of completion through margin gain and erosion. Sample reports will be reviewed to teach participants how complex information can be made simple. Lastly, the individual project will be rolled up into a company work-in-process report to help participant understand how the process works.
- **Establishing Overhead and Burden:** The sheet metal industry is unique in the sense that it requires a large capital expenditure to produce a final custom manufactured project. The cost structure is unlike nearly any other contractor other than perhaps heavy equipment companies. Further complicating the issue is that customers may not hire a contractor for a scope of services

(detailing, fabrication and installation) making it difficult to establish the proper overhead and burden allocations. This program is designed to educate business owners and financial managers how to properly establish overhead and burden in a sheet metal business.

Project Management: Driving Predictable Cost Projections – Maxim Consulting

Many project managers lack a clear handle on how their projects are performing financially. Most commonly it is because they have not been trained on how to forecast properly. We find many contractors struggle with how to build a robust cost projection process that provides for consistency and predictability. Profit fade at 90% complete is no longer an option in today's market. Teach project manager how to properly set up job budgets, track progress and forecast accurately. Moreover, learn critical financial indicators that point to problems on projects early so they can be rectified.

Learning Objectives:

- Identify how to manage work-in-process for better profitability
- Understand the relationship between project profitability and processes (budgeting, forecasting, change control, job status reporting and WIP)
- Apply earned value reporting to projects

Research, Relaunch and Recover – DeWayne Ables

How to quickly deploy your leaders to uncover the changes in your marketplace, prioritize and make progress emerging from the COVID-19 disruption. Unlike other market and social disruptions, COVID-19 has significantly changed the trajectory of markets that were expanding and has triggered others to emerge. Which ones do you pursue? Which ones do you stop pursuing? What do you need to know to better prioritize your business development efforts the next 6-12 months?

In this 60- minutes webinar we will clearly define how to empower your leaders to:

- Quickly assess how needs have changed with your existing clients.
- Provide specific questions to understand how projects will likely change.
- How to utilize that information from clients to help you and your team prioritize clients, opportunities, and markets.
- How to utilize that information to quickly innovate your solution and be in position to better serve your partnerships.
- This interactive workshop is for owners, leaders and professionals who have a desire to emerge from the COVID-19 era innovative, adaptable, and stronger than ever before.

Spark Your Top Performers – Tara Amis

How do you develop and encourage rising and aspiring leaders, while also continuing to raise the bar? Invest in your Top Performers! Learn techniques for removing frustrations and barriers in order to Spark Your Top Performers which will reap rewards throughout the organization.

Learning Objectives

- Leaders will understand how specific, controllable behaviors can build or bust trust with their teams.
- Define trust in a way that is focused on behaviors and not just character traits
- Establish actionable trust building steps to Spark Your Top Performers

Success in Technology Implementation – Maxim Consulting

The implementation of technology continues to be a challenge for many contractors. Success lies in the specific definition of workflow first, then the evaluation of the current technology available to insert into the

workflow. Standardization of these workflows enables staff to learn effectively and ramp up quickly in order to drive project success sooner.

In this session we will:

- Discuss technology strategy and its role in organizational success
- Outline successful workflow examples that drive rapid onboarding
- Examine examples of technology implementation that create transparency and repeatable, predictable results

The Art of Negotiation – Rebecca Klein Scott and Keith Scott

The fastest way to become a more effective, results-driven communicator is to clear out the verbal clutter and couched language that causes confusion. In this highly interactive workshop, you will learn to maximize the odds of getting the outcome you want. Keith Scott and Rebecca Klein Scott of TALLsmall Productions will reveal how to:

- Ditch the filler words (ah, um, like, you know, so...).
- Identify and replace weak phrases such as "I was just thinking," "I'm sorry but," "Let me tell you," "I kind of sort of feel that...". We'll reveal why these phrases need to go and how to get rid of them. These words appear as much in conversation as email.
- Craft emails that get results.
- Adopt body language that encourages connection and displays confidence.
- Become a more active listener.

Attendees will leave with tools they can put to use immediately to communicate more effectively
Participants will learn what words and phrases to avoid and how to say more in fewer words.

Understanding the Business of Construction – Andy Patron

- **Credits and Collections:**
 - Discover the secret of success – always bill on time.
 - Learn the key ingredients in credits and collections – knowing proper and effective billing procedures, documenting and supporting your invoices, and handling disputed charges.
 - Determine how much overbilling is too much.
 - Know how to best handle the collection process.
 - Learn to follow up in anticipation of delays.