



Your track to the next advancement in your A/E career — business skills

**Bonus: Receive our SDA Business Toolkit**

- ⇒ Industry Key Performance Indicators (KPIs) — How to Calculate and Interpret Industry Benchmarks
- ⇒ Business Entities — Comparison table of all types (C Corp, S Corp, Limited Liability Co. [LLC] Partnership)
- ⇒ Sample financial statements — Balance Sheet, Income Statement, Overhead Statement
- ⇒ Worksheets on top-down and bottom-up budgeting, calculating daily wage rates, average man-hour rates, and overhead

**Have a favorite business professional in your firm who's looking for industry specific educational opportunities?**

EDSymposium15 will be held following this pre-conference workshop at the American Mountaineering Center, October 9-10, 2015.

Details available at [www.sdanational.org](http://www.sdanational.org) > Learn >EDSymposium15 Registration

**EDSymposium15** is a two-day conference offering educational credits in the areas of Finance, Administration, Human Resources, Project Management, and Marketing as well as optional activities including an opportunity to experience the climbing wall at the American Mountaineering Center and a guided architectural walking tour of downtown Golden. Make new connections with industry colleagues from across the nation. Session programs include:

- ⇒ Making Golden "Golden" Again
- ⇒ Building Power Relationships
- ⇒ Cyber Security and Your Firm
- ⇒ Three Steps to Increase Your Fees Now
- ⇒ Savvy Hiring: Improving Your Organization Through More Effective Hiring Practices
- ⇒ How to Influence Your Professional Liability Premiums by Improving Your Firm Application

**What is SDA?**

For over 50 years, the SDA (Society for Design Administration) has promoted excellence in design firm management through education, and networking. It is the largest organization for managers and administrators in the architectural and engineering industry. SDA membership stretches across the United States and Canada and includes personnel in architecture, engineering, construction, landscape and interior design — because management is management regardless of the specific A/E/C professional services being delivered. SDA enhances the professional development and personal growth of its members, and consequently the development and growth of their respective firms. SDA's certification program allows managers and administrators to demonstrate their expertise in the areas of Finance, Human Resources, Marketing, Office Administration, and Project Management by obtaining the Certified Design Firm Administrator (CDFA®) designation. Learn more at [www.sdanationa.org](http://www.sdanationa.org).

Wednesday, October 8, 2015  
8:00 am —5:30 pm  
American Mountaineering Center  
710 10th Street  
Golden, Colorado

# BusinessTrak™

Your track to the next advancement in you A/E career — business skills



## Dollars and Cents | Project and A/E Firm Financial Management

According to recent college graduates, this is the #1 topic missing from architecture and engineering curriculums. But now, suddenly, it's the key to your career advancement.

### Not To Worry

The track to understanding project and design firm financial management is here for you.

Just walk through **BusinessTrak™**

And you're on the road to understanding the business skills you need to advance your career.

## Who Should Attend?

Now more than ever, rising architects and engineers need to develop their business skills in addition to their technical skills. The recent downturn in the economy should have started you thinking about how a firm keeps running even in a downturn and why some succeed and others don't. This program will guide you through the cycle of Project Delivery and see the key to firm success is: Marketing the Project, Executing the Project in a Profitable Way while managing risk, and, Understanding the financial and business underpinnings that holds the firm together.

### Architects | Engineers | Designers who want to :

- ⇒ Learn the nuances of business development and marketing in the A/E industry and the difference between the two.
- ⇒ Improve their financial management acumen.
- ⇒ Learn more about the art of project management from a financial perspective.
- ⇒ Pitfalls to avoid when starting a firm.

**Business Professionals new to the A/E industry** who want an overview of the project delivery system in the A/E industry, the nuances of A/E finances, the watch points in a firm delivering professional services. Perfect prep class for the Certified Design Firm Administrator (CDFA®) credential.

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

## Here's a sample of what you'll come away with at the end of the day.

- ⇒ Whether you want to pursue a pure design path in your career or want to pursue a management one.
- ⇒ Whether firm ownership — within your firm or outside — is for you.
- ⇒ Understand why you earn \$37.50/hour and the firm bills you out at \$125/hour and that's not just alright, but good for the firm and you.
- ⇒ Know why high utilization is good, but not the only piece of the puzzle, and why just high utilization on a team doesn't guarantee profitability. Why we don't just dump hours on a project.
- ⇒ Understand that the cycle always begins with getting the next project and how to accomplish that.

*The SDA's mission is to pursue excellence in Design Firm Management and understands that educating the rising design professional in business management aids the individual on their career path as well as benefiting their firm.*



SDA's Seminars earn you up to 7 hours of AIA LUs and/or 7 PDHs. SDA is an AIA registered provider.

## The Fine Print

### Travel and Accommodations:

The American Mountaineering Center is conveniently located at 710 10th Street, Golden, Colorado. Free parking is available at the conference center.

### Refunds and Cancellations:

Cancellations made more than 15 days before the event will be refunded. Cancellations made fewer than 15 days before the event will not be refunded, however, you may substitute attendees at any time.

### Registration:

Register online at [www.sdanational.org](http://www.sdanational.org) or use our registration form. Accepted forms of payment are Visa, MasterCard, American Express or check. If you wish to complete the online registration form but wish to pay by check, please print out your completed online form to use as an invoice and mail with your check to SDA Headquarters, 8190-A Beechmont Avenue, #276, Cincinnati, OH 45255-6117.

Special Thanks to Our Printing Sponsor



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

7:00 — 8:00 Registration and Continental Breakfast

8:00—9:30 Firm Marketing — How to develop your marketing strategy

*Have you ever stopped to consider how the project you're working on actually got started? What led the client to choose your firm to do the work? What was the sequence of events, activities, and environmental factors that even got your firm considered in the first place? A wise old architect once said "Nothing ever happens until somebody sells something - we designers just don't mention that out loud too much." In our discussion about Project Marketing, we will highlight key elements of AEC marketing practices such as research, planning, client development, proposals and qualifications, and promotional activity.*

9:30—10:00 Networking Break

10:00—12:00 Project Management

*Have you stopped to consider how proposals are generated at a profit and how that translates to the budgeted hours you're given to execute the project? This session will take you through the life cycle of a project from generating the proposal, negotiation and creating your budget, execution and analysis, and how to use lessons learned to propose on the next project. Key elements: Calculating bill rates, defining overhead, top-down and bottom-up budgeting, value-based pricing, the benefits of lump-sum and hourly work and when to use each, result analysis of two essential KPIs — chargeability and project multiplier.*

12:00—1:00 Networking Lunch

1:00—3:00 Financial Management

*Have you ever wondered how the one project you're working on fits into the bigger picture of the firm's finances? This session will explain the key financial statements, Balance Sheet, Income Statement, and Overhead Statement, and the beyond-the-bottom-line concerns of cash flow. It will also cover key financial and performance indicators (KPIs) to understand the key industry metrics you want to use to compare your firm to the industry.*

3:00—3:30 Networking Break

3:30—5:00 Business Topics

*Ever wonder what all the management staff is working on? This session will cover business entities and organizational structures. Why you want a banker and an insurance broker and key banking and insurance concepts — like the difference between general liability and professional liability insurance and why you want to set up a line of credit (and pay it back).*

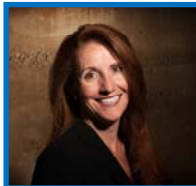
5:00—5:30 Q&A Wrap Up

*We answer your questions. Are business skills the track to your next career advancement? Where and how to get the skills and the experience.*

6:00—8:00 Networking Reception

*Your registration entitles you to admission to our EDSymposium15 Opening Reception. Join us for a casual adult refreshment after the workshop. Network with other up and coming architects, engineers, and designers from the metro Denver area and A/E business professionals from across the United States.*

## Your facilitators for the day are recognized A/E/C industry leaders



Stacy Stout, FSMPS, CPSM is the Founding Principal of STOUTStrategies. Prior to establishing her own consulting practice, Stacy held the position of marketing director for two prestigious architectural firms and a general contractor based in Denver. Her specific expertise in high level marketing for the built environment provides strategic thinking that translates into revenue and strategic priority results.



Eric Moore, CIC, LIC, is Vice-President of Moore Insurance Services, providing risk management and insurance services to a full range of commercial and personal clients with a special emphasis on the professional design community including Architects, Engineers, Environmental Consultants and Surveyors.



Deborah Gill, CPA, CGMA, CDFA, has been a CFO and Controller at large and small A/E/C firms throughout her 35-year career as well as a consultant to the industry. She has facilitated financial management programs for the AIA, NSPE, IFMA, and SDA.

### Registration

Name: \_\_\_\_\_

Position: \_\_\_\_\_

Firm Name: \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Email \_\_\_\_\_

Mail to: 8190-A Beechmont Avenue, #276, Cincinnati, OH 45255-6117

Fax to: (513) 448-1921 or Email to: [admin@sdanational.org](mailto:admin@sdanational.org)

### Your Fee:

\$175 Early Bird Registration—payment due by August 28, 2015

\$250 Regular Registration—after August 28, 2015

*Fee includes: Seminar, continental breakfast, lunch and after-hours networking reception*

### Your Payment Option:

Check enclosed for \$ \_\_\_\_\_ payable to **Society for Design Administration**

Credit Card # \_\_\_\_\_

Expiration Date \_\_\_\_\_ CSV Code \_\_\_\_\_

Name \_\_\_\_\_

Signature \_\_\_\_\_