



BizTRAK™

A one-day business essentials workshop for
design professionals in the A/E/C industry

Two workshop dates | two workshop cities!
Which one will you and your colleagues attend?

Sept. 24, 2019

4th & Madison Bldg.
925 4th Avenue
Seattle WA 98104

Sept. 25, 2019

Bernardo | Wills Architects, P.C.
153 S Jefferson Street
Spokane WA 99201



According to recent graduates, the #1 topic missing from design and engineering curriculums is . . .

The dollars and cents of A/E/C project and firm financial management

Now more than ever, rising architects and engineers need to develop their business skills in addition to their technical skills. This program will guide you through the cycle of project delivery and the keys to firm success: marketing the project, executing the project in a profitable way while managing risk, and understanding the financial and business underpinnings that hold the firm together.

SDA's **BizTrak™** is designed for emerging professionals looking to demonstrate their knowledge in practice management, and for anyone interested in advancing their career into firm management.

WHO SHOULD ATTEND?

Architects, engineers, landscape designers, business managers, marketing staff, administrative staff, project administrators; pretty much anyone in the office (or those looking for work in the industry) who want to learn more about A/E/C practice management: the nuances of business development and marketing in the industry, and the difference between the two; financial management acumen; the art of project management from a financial perspective; and the pitfalls when starting a firm.

Students studying A/E/C and related fields, and students taking business courses with a desire to work in the A/E/C industry will also benefit from this workshop.

SDA advances A/E/C professionals in the industry through education, networking, and resources in all areas of design firm practice management.

LEARNING OBJECTIVES

(based on ARE PM and PcM curriculum)

- You'll learn the key elements of A/E/C marketing practices such as research, planning, client development, proposals, qualifications, RFPs and RFQs, and promotional activity.
- You'll learn about the life-cycle of a project from generating the proposal, negotiating and creating the budget, as well as the benefits of lump-sum and hourly work and when to use each, and how to analyze results.
- You'll learn basic understanding of the key financial statements - Balance Sheet, Income Statement and Overhead Statement. You'll also learn the various business entities and organization structures that are important for lending and banking relationships.
- You'll learn about general and professional liability insurance, the importance of selecting clients and project types carefully, and the importance of having a contract before beginning work.



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Seattle Chapter's
mailing list

BizTrak™ Workshop Agenda

7:30a – 8:30a

Registration Check-in/Continental Breakfast/Networking

8:30a – 10:00a

Firm Marketing – How to develop your marketing strategy



Finding and winning work, including repeat business and referrals, is the lifeblood of any business. Yet most architects, engineers, and contractors never study sales and marketing, so they are unprepared when it comes to promoting their firm and their services, leaving "marketing" to the Marketing Department and "business development" to the Principals. But what would happen if everybody was involved in those efforts? In this engaging and interactive session, we'll discuss the difference between marketing and business development, walk through the client acquisition process, and look at how you can personally help your firm win more work – no matter what position you hold.

10:00a – 10:10a

Break

10:10a – 12:15p

Project Management



Have you ever 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, negotiating and creating your budget, executing and variance analysis, and how to use lessons learned to propose on the next project. Key elements: Triple Constraint Triangle of Scope | Schedule | Cost, defining overhead and calculating bill rates, top-down and bottom-up fee preparation, value-based pricing, the benefits of lump sum and hourly work and when to use each, analysis of the two essential key financial and performance indicators (KPIs) a PM is responsible for – chargeability and project multiplier.

12:15p – 12:45p

Lunch

12:45p – 2:45p

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 KPIs to understand the key industry metrics you want to use to compare your firm to the industry.

2:45p – 2:55p

Break

2:55p – 4:30p

Practice Management Business Overview

Ever wonder what management staff is working on? This session covers business entities and organizational structures, including: why you need a banker and line of credit (and pay it back); why you need an insurance broker to cover risk management; and explanation of key banking and insurance terms. It will also touch on human resources and the burden of working for the federal government in today's world of regulations.

4:30p – 5:00p

Final Q&A

Meet the Presenters

**William R. Strong, FSMPS, CPSM,
Associate AIA
(Bill Strong Consulting)**



Bill specializes in helping A/E/C firms with strategic planning, marketing and business development, communication training for technical staff, coaching and mentoring marketing personnel, client perception surveys, and client care programs.

Bill has over 46 years of experience in the A/E/C industry, with the last 30 years primarily focused on marketing and business development for architectural firms. Consulting for the last 6 years, prior to that, Bill was with a major Pacific NW architecture firm for 25 years and a principal the last 12. He received his Bachelor of Architecture degree from Kansas State University and his Masters in Marketing & Public Relations from the University of Missouri. Bill has been a member of AIA since 1973, a member of SMPS since 1982, and an SMPS Fellow since 1999. He has repeatedly presented at conventions and seminars for organizations locally, regionally, and nationally.

Deborah A. Gill, CPA, FSDA



Deborah has 40 years of experience in the A/E and land surveying industries working in large and small firms as well as a consultant to the industry. She spent 21 years as the Controller and Director of Business Operations at Clark Nexsen, establishing budgeting practices as well as KPI financial reporting. As consultant/owner of Profit by Design, Ltd, she provided accounting and systems support for Deltek Vision products for more than 100 clients. She established project management and financial systems in many companies to support the implementation of accounting software. She served for 5 years as CFO of Precision Measurements, Inc., implementing best practices to increase revenue, grow the firm, and successfully transition firm leadership to the next generation. She provides consulting services to start-up architectural and engineering firms and firms wanting to increase their bottom line.

Deborah developed the original "Handbook for Design Office Administration," material that served as the basis for SDA's **BizTrak™** practice management workshop, as well as the CDFA-U curriculum for SDA'S Certification in Design Firm Administration program. Deborah presents **BizTrak™** and deep dives into Ownership Transition, Project Management (finances), and Financial Statements for non-finance types for many organizations including SDA, SMPS, SHRM, AIA, IFMA, ACEC-V, and NSPS.



SDA is an AIA
Registered Provider

Earn up to 8 hours of
LUs, PDHs, or CEUs



Who We Are

For 60 years, SDA 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.

Contact Us

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Attendees Receive SDA's BizTrak™ Toolkit

- Marketing Go/No Go Process Template
- Industry Key Performance Indicators (KPIs): How to calculate, and industry benchmarks since 2010
- Business Entities: Comparison table of all types (C Corp, S Corp, LLC, Partnership)
- Sample financial statements: Balance Sheet, Income Statement, Overhead Statement
- Worksheets on top-down and bottom-up budgeting, calculating working capital and bill rates, and proforma Excel KPI report

Register by hard copy form below or online:

Seattle workshop: <http://sda-seattle.org/event/biztrak-workshop-seattle/>
Spokane workshop: <http://sda-seattle.org/event/biztrak-workshop-spokane/>

- SDA Members: Early bird registration by Aug. 30: \$160; after that: \$175
- Member firms: Early bird by Aug. 30: \$185; after that: \$200 (someone in your firm is a member of SDA, no matter their location)
- Non-members: Early bird by Aug. 30: \$270; after that: \$285
- Students (studying A/E/C or business): Early bird by Aug. 30: \$85; after that: \$100

Registration includes workshop materials, morning munchies, lunch, and afternoon snacks.

Credit card payments accepted online, or pay by check with the completed registration form below. **Registering more than one attendee?** Use additional sheets as necessary, indicating workshop date/city they are attending, along with their contact info as requested below.

I will attend this workshop (check one):

- ☐ Sept. 24 in Seattle
☐ Sept. 25 in Spokane

Please print:

Name: _____

Firm: _____

Title or Position: _____

Address: _____

City, State, Zip: _____

Email: _____

College/University (if Student): _____

Please make checks payable to SDA Seattle.

Seattle attendees, mail to:

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c/o Judy Beebe, FSFA
WSP USA
999 3rd Avenue Suite 3200
Seattle WA 98104

Spokane attendees, mail to:

SDA Seattle Chapter
c/o Gretchen Renz, CDFA
Bernardo | Wills Architects, P.C.
153 S Jefferson Street
Spokane WA 99201

Cancellation Policy

No-shows and cancellations after 12:00 PM (Pacific) on September 3 will not be refunded. You may, however, substitute attendees (please contact sdaseattle@gmail.com if you need to substitute).