

BusinessTRAK

Your track to the next advancement in your
A/E/C career.



THU 8 FEB 2018

8 am - 6 pm

REGISTRATION

<https://aiasa.org/business-trak/>

Early Bird

(on or before Jan 21) **\$160**

Late

(after Jan 21) **\$195**

**Earn
7
CEU**

FOR MORE INFO, CONTACT:

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Communications & Events Manager

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Excellence in
Design Firm Management

SDA



AIA
San Antonio

AGENDA

- 8:00 - 8:30** Sign In
- 8:30 - 10:00** Firm Marketing -
Develop your Marketing Strategy
- 10:00 - 12:00** Project Management -
From a Business Perspective
- 12:00 - 1:00** Networking Lunch
- 1:00 - 3:00** Financial Management -
Executing for Profit
- 3:00 - 5:00** Practice Management -
Business Overview
- 5:00 - 5:30** Final Wrap Up
- 5:30 - 6:30** Networking Reception



The Society for Design Administration advances professionals in the design and construction industries through education, networking and providing resources in all areas of A/E/C firm management.

SDA is proud to partner with AIA San Antonio in delivery of quality continuing education program that bolsters practice management knowledge at all levels of the profession.

To learn more about AIA San Antonio and its continuing education offerings, visit www.aiasa.org.

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 see that the key to firm success is:

-  **Marketing the project**
-  **Executing the project in a profitable way while managing risk**
-  **Understanding the financial and business underpinnings that hold the firm together**

Who Can Benefit from this course?



Architects, Engineers and Professionals who want to:

- Improve their financial management acumen
- Learn more about of project management from a financial perspective
- Avoid pitfalls when starting a firm
- Learn the nuances of business development and marketing in the A/E industry and the differences between the two

SDA's BusinessTRAK is designed for Emerging Professionals looking to demonstrate their knowledge in practice management and those interested in advancing his/her career into firm management.

What will A/E/C Professionals who attend the SDA's BusinessTRAK program come away with?

-  Information to help decide if you want to pursue a management career path
-  An understanding of whether firm ownership - within your firm or outside - is for you
-  Explanations as to why firms bill your time much higher than your pay rate, and why that's good for both the firm and for you
-  An understanding of why high utilization is good but doesn't guarantee profitability
-  A forward-thinking view of the project cycle: How to land your next project
-  7 Continuing Education Credits



Project and A/E/C Firm Financial Management techniques are the #1 topic missing from design and engineering curriculums, according to recent graduates.

A clear understanding of both is the key to your continued career advancement.



AIA
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Excellence in
Design Firm Management **SDA**

What will your day look like?

8:00 - 8:30

Sign In

8:30 - 10:00

Firm Marketing - Develop your Marketing Strategy

Highlight key elements of AEC marketing practices such as research, planning, client development, proposals and qualifications, and promotional activity.

10:00 - 12:00

Project Management - From a Business Perspective

See the life cycle of a project from proposal to negotiation, budget creation, execution and analysis, as well as 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. Review results analysis of two essential Key financial and performance indicators (KPIs): chargeability and project multiplier.

12:00 - 1:00

Networking Lunch (meal is included)

1:00 - 3:00

Financial Management - Executing for Profit

An in-depth look at the key financial statements: Balance Sheet, Income Statement, and Overhead Statement, and beyond the bottomline concerns of cash flow. Key financial and performance indicators (KPIs) will also be discussed.

3:00 - 5:00

Practice Management - Business Overview

What business entity and organizational structure is right for you? Topics include why you want a banker and an insurance broker along with key banking and insurance concepts. We will also discuss the burden of working for the federal government in today's world of regulations.

5:00 - 5:30

Final Wrap Up

Still have questions? Ask away and we'll get them answered!

5:30 - 6:30

Networking Reception (optional)

Unwind and avoid the traffic while enjoying an unstructured conversation about what you have learned! Join us for food and drink at the 5:30 kickback hosted by hotel management.

Attendees will receive our SDA Business Toolkit

-  Industry Key Performance Indicators (KPIs) - How to Calculate and Compare to 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
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Who 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 design and interior design.

SDA enhances the professional development and personal growth of its members, and consequently the development and growth of their respective firms.

The Society for Design Administration, the recognized leader in education for best practices in the A/E/C industry, offers a Certified Design Firm Administration (CDFA) accreditation that recognizes your achieved administrative and management experience.

The CDFA credential is a voluntary certification designed to elevate the professional standards in design firm management and administration, and to contribute to the firm's organizational growth and maturity through better practices in firm management.

Advance your career today by joining SDA. Continuing education not only helps you keep up with industry best practices, it helps keep you relevant in a marketplace where a highly-skilled and specialized workforce is in demand. SDA also offers a diverse array of resources and ongoing educational opportunities through programs, forums, webinars, and volunteerism. SDA provides resources in each of the following areas: Finance, Human Resources, Marketing, Office Administration, and Project Management.

To learn more about the SDA or the CDFA credential, please visit www.sdanational.org.

BusinessTRAK Presenters



FACILITATOR

Deborah Gill, CPA, CGMA, CDFA is the Chief Financial Officer at Precision Measurements, Inc. (PMI), a 50+ person land-surveying firm located in Virginia Beach, VA. Before joining PMI in July 2014, Deborah was the Director of Business Operations at Clark Nexsen, PC, a 550 person multi-disciplined architecture, engineering, planning, and interior design firm located in VA, NC, GA, and DC. She has also owned her own firm, Profit by Design, Ltd. providing consulting services and Deltek Vision support to over 100 clients in the Virginia and North Carolina area. Deborah has worked in the A/E/C industry for over 30 years. Deborah has provided many seminars on both accounting and human resources topics to SDA, AIA, NSPE, IFMA, VSCPA the Virginia Society of Professional Surveyors in person, as well as, through webinars at both local and national levels. She is a Past National President for the Society for Design Administration, where she has served as the National President on two separate occasions. Deborah is also a 10 for 10 leader of the Hampton Roads United Way Women's Leadership Council.



INSURANCE

James (Jim) Jimmerson is currently a Vice-President of USI Southwest and has been in that position since 2005. He has been involved in the Architects/Engineers Professional Liability insurance division of CIC and USI since 1993. He actively participates in the risk management and daily professional liability insurance needs of over 400 firms in central and south Texas. Jim earned a Bachelor of Science in Civil Engineering from Texas A&M in 1986 and a Master of Business Administration from Texas A&M in 1993.

BusinessTRAK Presenters



MARKETING

Audra Allen, Co-Founder and Principal at Emerald Fox Marketing & Consulting, has worked with professional services firms her entire career, with a special focus on the A/E/C industry. From the first time she was tasked to create mini-brand for a new service line, Audra knew she had found her calling. Her guiding principle has been "What really matters in great marketing is the smart thinking behind it." She is passionate about getting to the heart of a brand's strengths and weaknesses and building a solid platform for business growth. Audra is an active member of the Society for Marketing Professional Services (SMPS) and serves as the Sponsorship Director for the San Antonio Chapter as well as previously serving as the 2015-16 Communications Director.



INSURANCE

Kevin G. Pratt, Vice President, A/E Practice Leader at USI, is a licensed Property & Casualty agent, specializing in professional liability and risk management services to architects and engineers, in a variety of disciplines. Kevin is USI's current Architects & Engineers Division Leader in Houston, TX. In Texas alone, USI currently represents more than 700 design firms. Nationally USI represents over 5000 design professionals. He holds a degree in Business/Information Systems and has over 20 years of project management and sales experience.