



maxim
CONSULTING GROUP

2026 Full Training List

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Maxim Consulting Speaking Topics

Managing the Lifeblood of Contracting ~ Cash Flow

Cash flow is one of the most important issues facing contractors today. As the market continues to stay strong, companies are faced with starting new projects, hiring staff, and investing in assets to support the business. More companies go bankrupt due to cash flow issues than due to profitability. Many things can and should be done to improve cash management practices. We will explore a range of tools and techniques, from simple to complex, which allow firms to manage and control cash flow. Examples include contractual negotiation strategies, pricing and bidding practices, development of cost and resource-loaded schedules that tie to billing activities in the schedule of values, use of 12-week cash flow forecasts, project closeout procedures, and managing the billings and collection cycle. An interactive cash flow simulation provides hands-on experience that enhances the learning outcomes.

Learning Objectives:

- Learn the importance of cash management practices
- Increase profits with billings and collections
- Apply tools and techniques that optimize cash flow
- Maximize cash flow with process standardization
- Create transparency and accountability with measurement

Inequitable Payment Practices

Specialty contractors are expected to manage many forms of risk; some of which are inherent to the trade. Other forms of risk, such as payment practices that result in carrying the cost of capital for 30-60-90 days, have a significant impact on your ability to remain financially solid and/or acquire new work. This presentation quantifies the impact of slow payment and identifies mitigation strategies to address inequitable payment practices and protect the interests of specialty contractors.

Learner Outcomes:

- Quantification of the impact of inequitable payment practices
- Specific, tangible things specialty contractors can do to improve payment cycles
- Jurisprudence surrounding contract language and enforceability
- Negotiating points with general contractors and owners
- Legislative talking points

Improving Cash Flow and Inequitable Payment Practices

Cash flow is one of the most important issues facing contractors today. Companies are faced with starting new projects, hiring staff, and investing in assets to support the business. More companies go bankrupt due to cash flow issues than due to profitability. Many things can and should be done to improve cash management practices. Practical tools and strategies to improve cash flow will be discussed. In most cases, they are improvements to existing practices that can be quickly implemented to put a focus on cash flow and drive the right organizational behaviors. This presentation will also quantify the impact of slow payment and identifies mitigation strategies to address inequitable payment practices.

Learner Outcomes:

- Increase profits with better billings and collections practices
- Apply tools and techniques that optimize cash flow
- Maximize cash flow with process standardization
- Create transparency and accountability with measurement
- Quantify the impact of slow payment
- Specific, tangible things specialty contractors can do to improve payment cycles
- Jurisprudence surrounding contract language and enforceability
- Negotiating points with general contractors and owners

Cracking the 'WIP' – Driving Predictable Cost Projections

Many project managers lack a clear handle on how their projects are performing financially. Most commonly it is because they have not been trained in 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 managers 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

Key Performance Indicators – Using Lagging Information to Create Leading Indicators

Effective financial management expertise at the top of your operation is expected. Learn how to identify the key indicators that monitor project performance and allow you to drive responsibility down to the project level, affecting the greatest positive change. Discover how to automate processes throughout different levels of your organization so that the correct information reaches the right staff levels in a timely manner. Using lagging information to create leading indicators is an age-old problem but with a bit of insight, we can identify the top 12 indicators all organizations should be measuring and reporting on.

Learning Objectives:

- Review key performance metrics that create actionable information
- Discuss data collection and metric automation methods
- Understand deployment options

Key Performance Indicators 5.0 – Increasing Margin and Reducing Risk

This session will focus on helping contractors identify issues sooner to improve margin and mitigate risk. The pandemic has necessitated new ways to monitor performance at the company, business unit and employee level. Properly established KPIs are more critical today than ever before. Contractors will be able to readily identify pertinent metrics for their organization and have practical tools and tips to operationalize the use of the KPIs.

Learning Objectives

- Evaluate and present KPIs for all functional areas (Business Development, Estimating, Prefabrication, Purchasing, Operations, Equipment and Financial Controls / Job Cost)
- Review options to operationalize the KPIs
- Understand implications and proper use of the KPIs
- Linking business strategy and desired outcomes to KPI driven compensation options

Change Order Management

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:

- How to properly notify owners and general contractors of changed conditions to reserve your rights
- How to scope, price and sell a change order
- Negotiation strategies to maximize outcomes

Building the Case to Win – Claims and Change Orders

In this session, the group will discuss contract risk management and preservation of rights in order to increase the chances of financial recovery during project execution. Since the most valued information for contract conflict resolution comes from those closest to the work, the basics of preparing that documentation and effectively translating the information will be discussed. The group will gain understanding and review examples of risky contract clauses, the process of claims management, the legalities of change order control, and preparation for lawsuits.

The Life Cycle of Estimating – Bidding with More Data and Less Gut

With the technology available to the industry, it is entirely possible to price work utilizing data in lieu of estimating software with the "hope" that it contains the right information to help land the job AND not lose profit. During this session, we will discuss the life cycle of estimating and the critical path of information that must be shared through the get work, do work, and keep score functions to allow for this critical information to be gathered, extracted, and utilized.

Learning objectives:

- Define bid selection criteria – not all opportunities are good ones
- Discuss the utilization of data and data mining in bid strategy
- Outline the link of consistency required between estimating and work breakdown structure
- Show the critical role of the estimator in the essential preconstruction planning process
- List the lessons learned needed to close the information loop. This is the most valuable information that is so seldom shared

Driving Project Success

The driving project success module is a highly interactive session geared towards field leadership. Participants are immediately placed in the positions they find themselves every day – tasked to build a project without all the tools or information they need to get the project done. During the workshop, attendees learn about the importance of productivity, motivation, coaching, leadership, planning and technology to drive project performance. A full-scale BIM model of the project is utilized to demonstrate just how drastically technology and prefabrication are going to change the industry. This module sets the stage for the remaining content of the program by introducing all the concepts taught in the program.

Learning Objectives:

- Industry trends and changes
- Field management obstacles and opportunities
- Understand how planning and communication impact productivity
- Understand how productivity is measured
- Evaluate impact of rework on productivity and project performance
- Evaluate impact of BIM on project performance through improved planning and communication

Teamwork and Technology to Drive Accuracy in Project Financials.

For many organizations, accuracy in projected project financials is little more than an educated guess. Significant changes in the forecasted performance of projects highlight internal weaknesses in financial talent. Proper processes, training and a culture of teamwork are the key components to improve this critical skill set. During this session, we will discuss best practices in financial controls, technology deployment, and with the roles and responsibilities necessary to create a predictable outcome in our construction jobs.

Learning Objectives:

- Define the structural components of effective financial controls
- Discuss the roles and information sharing required for an accurate forecast and outcome
- Use of technology to share real time information to drive project production and profitability

Strategic Planning – Putting Strategy First

Today's economic times are challenging contractors with tight budgets, compressed schedules and workforce shortages. Does your company's strategic plan recognize these issues as you identify what the next 3-5 years will bring? Strategy helps firms create a competitive position by defining which markets they will service, which customers they want to work for and what competitive differentiators they will leverage to maximize market share. Strategy helps firms clearly define how they create value for the customer, thereby reducing competition. We will discuss the work steps to build a comprehensive and effective strategic plan including the supporting organizational development initiatives and how the plan links up with the business development efforts of your firm.

Learning Objectives:

- Developing your firms' strategy and competitive advantage
- Review planning models used in evaluating strategic alternatives
- Define the necessary work steps and expected outcomes of an effective strategic planning process
- Learn from another contractor how a carefully planned strategy can leverage your company for growth and profitability.

Creating a Customer or Member-Focused Organization

Interaction with customers is critical to your organization's success and this contact occurs with employees at every level. Not all of your employees feel comfortable with or understand how important their role is in building and maintaining customer relationships. By developing specific skills in this area, your staff can more effectively represent your association and help you reach your defined objectives. Learn what works and what doesn't with customer service to make sure everyone on your staff is contributing to positive experiences for your customers and members.

Learning Objectives:

- Identify the cost of poor customer service
- Understand how to implement customer surveys to measure your performance
- Learn the one question you must ask to evaluate customer and member satisfaction
- Use the 8 Rules that Govern Successful Relationship Building to develop guidelines for great customer and member relations

Technology Trends That Drive Contractor Success

By 2020 Internet-connected devices will grow from 400 million today to 50 billion and smart phones will have the capability of storing and accessing as much information as IBM's supercomputers. Technology will be even more critical in gaining new customers and recruiting key employees as everyone (employees, clients and competitors) will have hand-held access to the biggest, smartest, fastest computers in existence today and the workforce you hire has never lived without technology. Successful contractors understand the positive impact that technology has on business processes, the ability to respond to change, cost savings, efficiency and the bottom line.

Learning Objectives:

- Redefine IT strategy as a system of engagement versus a system of record-keeping.
- Understand how technology integrates business processes, eliminates waste and rework, and minimizes the cost of problems through early detection.
- Identify the technologies that incorporate the field and office operations to create real time job tracking.
- Realize the productivity impacts that technology offers for service-divisions.

Delivering the Promise: The Executive's Role in Marketing and Branding

Your strategy distinguishes your company from competitors, identifies profitable markets and preferred clients, and ensures continuity. This strategy incorporates your mission, values, and the "promises" you make to customers. As the company grows, you are no longer the primary sales force in the organization and have hired leaders to manage the marketing and selling of the company's services. However, the role of the executive in the selling effort is still very critical. The purpose of this program is to outline the executive's role in the business development of the firm, specifically in creating an effective strategy that is reflected in the branding, marketing and selling of the organization's services and culture.

Learning Objectives:

- Define the differences between Strategy, Branding, Marketing, and Selling and emphasize how the executive must drive alignment company-wide.
- Understand the executive's role in acquiring business, executing the work and evaluating performance with respect to purpose, perspective, people and process.
- Discuss important efforts to put your marketing program on semi – auto pilot

Identifying, Developing and Retaining High Potential Leaders

Leadership development is once again at the forefront of executive's thoughts as growth returns and the aging work force continues to leave the industry at an alarming rate. Realizing that leadership development efforts take years, this program presents a framework to identify those high potential leaders and to develop them using methods scaled down from the top companies in the world, so that they fit for any size of electrical contractor.

Learning Objectives

- Present the nine-box framework for assessing talent within the organization and determining high potential leaders.
- Define a broad methodology for developing leaders everyday with experiential and relationship-based development practices.
- Present a series of options that can be used to retain the high potential leaders and ensure the return-on-investment in their development is realized.

Look in the Mirror: An Executive's Role in Business Development

There is no person better at selling your company than the owners, president and executive team members. The first step to effective business development is freeing up the executive team so that they can sell the work and close the sale. Critical to making this happen is strong organizational structure and process, and consistent execution of well-defined processes. Once this structure is in place, you have the time to evaluate your company's potential for success, develop the strategy and ultimately align the marketing and branding to match the strategy so that the company, over time, can move to a dedicated sales force model. Sending the business development team off on a mission to "get work" is a recipe for failure. Learn how to put structure behind the business development process that will generate results.

Learning Objectives:

- Understand the organizational structure and processes your company needs in place in order to make time for executives and business development staff to focus on building the business.
- Develop a strategy for selling work that capitalizes on the markets where you have the highest potential for profitability.
- Identify the role that everyone in the organization has in marketing and business development.
- Learn from best practices of other contractor's experience how critical the executive's role is to company growth.

Managing Yourself for Optimum Personal Productivity

We all have the same 24 hours in a day. Why is it that some people can accomplish a lot while others struggle to make it through their in-box? It is impossible to manage time, but you can develop self-management skills to make you more focused and productive. This interactive and reflective session will identify the time wasters that prevent you from reaching your potential and provide you with 10 tips on how to maximize productivity!

Learning Objectives:

- Discuss what it looks like to manage your time effectively
- Explore the difference in important and unimportant activities
- Conduct a self-analysis about how you spend your time and discuss these findings with your classmates
- Improve your time management skills with valuable tools and techniques

Successfully Managing the Work/Life Balance

The business world of the 20th century is one with 24/7 communications, technology that connects us even in remote locations, and to-do lists that never end. How effective are you at separating that line between your work life and your personal life? Do you need to separate them or is that possible? This session encourages creating harmony between life and work requires by identifying a purpose and using your purpose to inspire and define goals.

Learning Objectives:

- Create goals for your entire life integrating both work and personal areas in an appropriate alignment with your purpose.
- Establish and utilize 7 boundaries of PROMISE to maintain proper balance in your life.
- Develop strategies to keep yourself accountable for an aligned and balanced life.

Process Driven Profitability (Process Mapping)

Well defined, scalable systems and processes deployed with technology and used consistently by everyone in the company are the foundation to minimizing risk and achieving predictable results. Many contractors know and understand this concept, and many have, at some point, defined their processes. Perhaps they are sitting on a bookshelf right now and are rarely used or even referenced in order to understand the company procedures. The more a company grows the more difficult it becomes to develop and deploy these systems. Yet the need increases dramatically. We will discuss how to define standard procedures in your organization, generate buy in that will operationalize their use, and how to utilize them as a platform to build bench depth that will move the organization to the next level.

Learning Objectives:

- Illustrate the value of workflow documentation and provide examples of how best of class contractors develop and document standardize workflow
- Demonstrate how to leverage technology in the deployment of standardized processes and procedures that create consistency and predictable results.
- Describe the keys to successfully operationalizing processes including staff training and metrics that provide visibility on compliance and the bottom-line impact.

Performance Based Incentive Compensation

84% of organizations offer some form of reward programs to employees. A well-designed compensation plan rewards both individual and group performance, is connected to the performance management system, and incentivize certain behaviors. Developing internal processes is critical to an effective incentive compensation system.

Learning Objectives:

- Understand the importance of defined standards and processes
- Identify how to utilize the right tools to drive desired outcomes
- Measure performance with objective metrics
- Establish KRA-based job descriptions

Value Stream Mapping

The best way to improve and enhance the value you deliver to customers is Value Stream Mapping. This requires that your organization grasp what is happening at every internal and external touch-point. It is the process by which an organization identifies the sequence of activities required to act on and deliver a customer's request. Value Stream Mapping allows organizations to visualize work systems (prefabrication, IT, financial systems, etc.) and identify the gaps, overlaps and roadblocks in how customer requests/orders are completed.

Learning Objectives:

- Learn how to identify internal and external customers
- Define what your customers value
- Understand the fundamentals to developing a process map
- Identify how a gap analysis is used to highlight process improvements

Transform Your Organization for the Future

With the future bringing more of the same accelerated challenges of schedule compression, pricing pressure, and manpower shortages, the industry will be forced to innovate at a heightened clip. Most contractors are trying to solve these massive industry issues with tactical solutions, and everyone is basically trying the same approach they have used for years.

The reality is a new business model that is evolving to address these challenges with strategic, long-term solutions. Best in class electrical contractors are utilizing value stream mapping to visualize work systems (prefabrication, IT, financial systems, etc.) and identify the gaps, overlaps and roadblocks in how customer requests/orders are completed. We will use case studies of US based contractors including pictures and detailed descriptions of what they have done, why, and the substantial bottom line results they are enjoying.

Learning Objectives:

- Learn to identify internal and external customers
- Define what your customers value
- Understand the fundamentals to developing a value stream map
- Identify how a gap analysis is used to highlight process improvements

Removing the Myth of Bid Markups – Dual Overhead Rates of Recovery

The objective of an estimating group is to produce a bid that represents cost, including overhead. We will show you how to put math behind the method of recovering overhead, so that you are recovering it correctly and accurately. We know intuitively that a high labor, low material job contains more risk, but how do we account for this? We will explore this very simple method and give you the training necessary to implement its use.

Learning Objectives:

- Eliminate the guesswork behind bid markups
- Understand what should be contained in overhead, and what should be considered direct job cost
- How to calculate the correct overhead recovery based on direct job costs components and job size

Managing Economic Risk by Utilizing Multiple 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. As the market continues to shift, contractors must have the capability of delivering in multiple contract processes in order to be competitive in the future.

Learning Objectives:

- Discuss the changes in procurement strategies for owners and why this is occurring
- Explore the differences in different project delivery methods
- Provide guidance on why a client might select a method
- Examine how each delivery method changes a contractors' risk profile and suggestions on how to mitigate those risks

KRA Based Job Descriptions in Construction

We have many challenges in construction: tight budgets, compressed schedules and changing owner demands. The good news is, we have the ability to manage many of these challenges effectively. In this session, we will discuss how to hire the right people, conduct objective and constructive evaluations, and create long term employee engagement. Key Results Area job descriptions provide the ability to communicate clarity of job responsibilities along with the metrics used in order to evaluate the desired behaviors. Additionally, it allows your staff to see what is expected of other positions within your organization, helpful when researching their own career path map, and creating a focus on long-term success and loyalty.

Learning Objectives:

- Identify the tools necessary to identify the correct level of work
- Share an example of how to organize the Key Results Area role description
- Understand how to assemble a bank of interview questions to beat the odds of finding the 'right hire'

Supply Chain Management

Nearly 40% of every dollar that runs through an organization is materials. However, industry pays little attention to the supply chain because the risk is in the labor, not the materials. This session will explore how to better leverage your supply chain to not only drive down material prices and costs associated with the “ing’s” of finding, buying, invoicing, payment, shipping, handling, etc. but also how to drive improvements in labor productivity through more effective use of your supply chain. Participants will explore basic supply chain principles, purchasing contracts, vendor managed inventory, consignment and full blow supply chain mechanics and the use of material requirements planning software and systems.

Learning Objectives:

- Understand the economics of materials and their impact on productivity and profitability
- Understand supply chain terminology and key concepts
- Evaluate options to improving your own supply chain
- Understand the impact of material requirements planning system

Technology and Transparency – The Future of Construction

Identifying the tools and technology needed to best position your organization for a successful future can sometimes be daunting. During this session, we will discuss why these tools are critical to future profitability as well as examples of ERP systems, Project Management software, Production Tracking solutions, and Purchasing solutions. Additionally, we will show examples of the reports and metrics necessary to provide transparency on performance so that challenges can be identified early enough to effect a change to minimize financial losses and maximize margin gains.

The why. We will:

- Discuss what is driving this need to change
- Explore the value of what this information provides
- Define the levels of the organization that benefit from this change

The how: We will:

- Evaluate what type of core ERP is needed
- Discuss software implementation strategies
- Compare integrated vs. stand-alone project management solutions
- Define what production tracking methods are preferred
- Learn to maximize purchasing power and negotiate favorable terms
- Review reports and dashboards based on the needs of the user

Technology and Transparency, Part II - Linking Technology to Performance

In this generation of construction, we capture more data than ever. That said, how accurate is the data you are capturing and, if it is not, what causes the problem? What do we do with that information once compiled and how is it shared?

In this course, we will discuss the importance of connecting aligned vision, data collection, and performance management to create measurable, impactful tools that can increase the bottom line.

We will:

- Discuss the bottom-up philosophy of data collection
- Define data collection solutions designed by level of work
- Analyze the link between data and performance management

Pull Planning

Pull planning is a lean technique that is being successfully deployed in the construction industry to help improve coordination, planning, and ultimately reduce overall schedule durations.

Participants will review case studies demonstrating the inefficiencies experienced on projects due to out of sequence work. An introduction to pull planning techniques and terminology will allow participants to join in on two separate hands on activities that illustrate the productivity improvements experienced as a result of batch flow and sequential work. At the conclusion of the session, participants will be educated on the impacts and overall process of pull planning.

Learning Objectives:

- Understand the mechanics and terminology of pull planning
- Identify waste associated with out of sequence work
- Effectively participate in a pull planning session with owners or general contractors

Change Management

Implementing change is hard. People naturally do not like change. In this session, we will discuss why change initiatives typically fail. We will illustrate examples of the timeline of most change initiatives and the associated behaviors that are observed along the way. By understanding how change manifests itself leaders can anticipate what will happen next. The critical elements of a successful change initiative will also be discussed.

Ownership Transition Management Succession

Nearly half of all contractors will go through an ownership transition and / or management succession by 2030. Learn what alternatives exist to transfer ownership along with the pros and cons of each. Also explore techniques to garner alignment and buy in from the incoming management team. Evaluate tools to identify skills gaps of the new ownership and management team and discuss resources and options for filling the gaps.

Learning Objectives:

- Understand alternative methods and options for ownership transition
- Learn how to identify an incoming management team
- Identify options to structure incoming ownership / management team to optimize results
- Identify resources and options to help fill skills gaps considered necessary for success

CFO Best Practices

CFOs play a key role on the executive management team and should be responsible for more than just “running the numbers”. What best practices can CEOs put in place to drive a higher ROI from Construction Financial Managers? Clearly identifying opportunities in your business that the CFO can make an impact requires defined expectations and measurable results.

Learning Objectives:

- Define what CEOs expect from Best-in-Class Construction Financial Managers (CFMs)
- Draw distinction between role and responsibilities of the CFO and Controller
- Establish value of true CFMs and what they can (and should) bring to the business
- Identify critical functions or opportunities in your business the CFO may not be adequately fulfilling

The Building Blocks of Best-in-Class Contractors

During this session, we will discuss the foundational pieces of best-in-class contractors that allow organizations to grow profitably while deploying the proper tools to minimize the risk associated with growth. Attendees will learn the basics of strategy development, business development, leadership development, business process re-engineering, project execution, prefabrication, and technology strategy providing a holistic view of the elements of “best in class” contractors. The “Building Blocks” model will be reviewed in detail and will be built upon throughout the entire program.

During this session, we will:

- Discuss the definition of strategy in setting the future path of an organization
- Outline effective structure by depicting current organizational structure contrasted with tomorrow’s needs for success of strategy
- Clarify the need for strong, defined systems and processes along with employee engagement principles to allow staff to learn and grow appropriately in order to fill both the current and future needs of the organization.

The Evolution of the Electrical Contractor as an Integrator: Part I

The evolution of technology in the industry is creating an opportunity in what was once seen as a commodity – the installation of low voltage cabling and devices. Technology adoption in infrastructure, industrial, and commercial projects continue to advance further fragmenting installer expertise. Electrical contractors that can be flexible, bringing a solutions-oriented approach to client needs and serving as an integrator will be positioned to capture this growing segment of the market. We will use examples and case studies within the market to demonstrate the growth of the market and the impact on contractors.

Learning Objectives:

- An overview of the low voltage and automation market segments that are evolving and their projected growth
- Present scopes of services by contractors that are necessary to meet that growth
- Present methods of entering the market and go-to market strategies
- Present an organizational structure, roles and responsibilities and necessary certifications/field skills necessary

The Evolution of the Electrical Contractor as an Integrator: Part II – How to go to Market

The first study reasonably answered the questions of “why” go after the integration business and “what” services would be provided. The goal of part II is to build on the findings of the first study and help companies understand “how” to position the services with the customer and be able to engineer, program, install and maintain the integrated systems. We will help contractors understand how to grow or enter the systems integration market which has been identified as a high growth market segment and in support of the 10 by 25 objective.

Learning Objectives:

- An overview of the baseline of requirements for establishing credibility with clients
- Define a multitude of processes for performing work in the Low Voltage and Integration Market (sales, engineering, procurement, testing and management)
- Identify a required competency chart for installation of integrated systems
- Synthesize the findings to develop a “How-To” guide and recommended sample artifacts (checklists, design development criteria, etc.)

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.

Learning Objectives:

- Understand the difference between fixed and variable overhead
- Learn how to segment traditional overhead, detailing, fabrication and installation overhead and burden
- Evaluate different methods for calculating overhead and burden in each disparate phase
- Establish the talking points and information necessary to negotiate proper overhead and burden calculations

Calculating Shop Burden

Electrical contractors are unique in the construction industry in that they engineer, install and integrate products made from both commodities and engineered materials. The scope of services provided by electrical contractors creates confusion and sometimes conflict with owners and general contractors who may not be familiar with the cost structure of an electrical contractor. The purpose of this presentation is to detail the various types of expenses incurred by an electrical contractor in support of a proper determination of overhead and burden rates. The objective is to provide a clear and concise discussion surrounding the scope of services provided by the electrical contractor and thus how overhead and burden should be calculated.

Following this course, participants will be able to:

- Understand the impact of fixed and variable costs on burdens
- Differentiate between overhead burden, engineering/fabrication burdens, and field burdens
- Calculate overhead, engineering/fabrication, and field burdens separately

Production Tracking in the Detailing, Manufacturing and Installation Process

Tracking productivity has been a challenge for electrical contractors who are characterized by a high degree of offsite work such as detailing plans and off-site fabrication necessary to build a customer's project. There are few standards related to tracking productivity for off-site facets of construction and because of that, it remains unclear what best practices are applicable for these design-driven contractors to effectively track productivity. Traditionally electrical contractors have focused on tracking productivity in the field since it is often viewed as the most intensive and riskiest portion of the work. Labor costs typically account for anywhere from 30% to 70% of a project's costs depending on the type of work being performed, so a small improvement in labor productivity can yield substantial increases in profitability. However, there is a growing recognition that productivity tracking for electrical contractors should encompass the entire lifecycle of a project from initial design and engineering through punch list.

Following this course, participants will be able to:

- Differentiate tracking productivity approaches for engineering, off-site fabrication, and installation
- Setup a standard cost code structure for engineering, off-site fabrication, and installation
- Identify standard units of measure for each code, understand how to apply time to those codes, and report progress and benchmarking

Presentation Skills

Presentation skills are no longer just for salespeople. This is especially true since the delivery method in the construction industry continues to shift toward collaborative and design build models. The ability to present well is a necessary skill in order to convey ideas, negotiate, and sell at all levels within the construction organization. This is a required skill encompassing the field leadership level to the corporate level to effectively communicate with both internal and external clients.

In this session we will discuss:

- Defining the vision
- Dictating versus engaging
- Preparing the presentation
- Reaching the audience
- Putting presentation skills to work

Career Path Mapping

Organizations are justifiably concerned about the ability to retain talent in an environment where availability of workers is so very scarce. Additionally, the changing needs of today's workforce require employers to reassess their employee development programs. Career path mapping brings clarity to an otherwise cloaked path of progression, allowing the employee to understand the opportunities within the firm and engage them in creating, and owning, their own map.

Learning Objectives:

- Understand the driving force behind the need for career path mapping.
- Develop a strategy for creating an effective career path map that focuses and engages today's construction staff.
- Discuss the deployment and implementation needed to create a positive, building culture.

Scaling Up

The keys to scale up your business are attracting and retaining the right people, creating a truly differentiated strategy, directing flawless execution, and keeping cash reserves to weather the storms. Many contractors struggle with growth and breaking the barriers of a \$10M, \$50M or \$100M Company. Fortunately, there are some very predictable barriers that companies will face. Having first-hand knowledge of these barriers, participants will be exposed to "what to expect" at various revenue sizes and "what to do" to overcome the challenges and remain profitable. The focus of the program will be in four critical areas of the business - namely People, Strategy, Execution, and Cash.

Learning Objectives

- Recruitment strategy and finding A Players
- Defining and executing a truly differentiated strategy
- How to drive flawless execution
- Finance mechanisms to weather the storm

Labor Cost - Convert Your Biggest Risk to Your Biggest Advantage

Case studies demonstrate common myths of field productivity due to a fundamental misunderstanding of what productivity really is. Case studies provide step by step illustration for participants to simply and clearly define productivity and production. Case studies illustrate methodologies for measuring and managing jobsite productivity for sustainable, breakthrough performance gains.

Following this course, participants will be able to:

- Clearly define and appropriately measure productivity.
- Clearly define and understand the mechanics of production.
- Understand blind spots existing project management approaches have to productivity improvement and what to do about it.
- Gain an introductory understanding, based on case studies, of how to measure cost of lost production and how to implement effective improvement routines.

Crew Level Production Planning & Execution: Set Goals and Win

Case studies dispel common myths and pitfalls of typical field productivity approaches. Case studies illustrate effective Crew Level Production Planning techniques, including visual batching of work, input worksheets, resource (manpower) loaded scheduling, and labor cost analysis, simple daily productivity tracking and forecasting, and effective, measurable improvement strategies.

Following this course, participants will be able to:

- Clearly and simply define and measure productivity.
- See first-hand case studies and real examples of planning tools designed to set targets and manage labor productivity for superior results.

Introduction to Project Level Lean – What's the Big Deal?

The construction industry is increasingly utilizing formal production management principles and techniques known as 'Lean Construction' to increase reliability, jobsite productivity, and superior control over schedule. Using case studies, this course provides participants with a clear understanding of the background of Lean in Construction, why it's important, why it's effective and why they should care.

Following this course, participants will be able to:

- Understand clearly what 'Lean' is and why the construction industry needs it.
- Understand 'Lean' terminology and be able to define it relative to other Project Management processes.
- See real life examples of the various methods for implementation and the results it generates
- Gain an introductory understanding of best practices and common pitfalls.

Construction Equipment Economics ~ Building Blocks of an Effective Equipment Budget

A critical aspect in equipment-intensive construction companies is the budgeting of capital expenditures as well as annual equipment hours, and operating costs. This session will provide insights into the process, inputs and workflows to establish accurate and effective budgets. Learn best practices of how the internal "Equipment Triangle" of Operations, Fleet and Accounting can collaborate to achieve success in managing, budgeting and tracking your fleet.

Learning Objectives:

- Understand the workflow of a collaborative and comprehensive equipment budgeting process
- Effectively forecast capital expenditures
- Establish equipment hours budgets
- Understand the basics of setting equipment rates and forecasting equipment charges to jobs
- Budget depreciation, rentals and other equipment owning costs
- Identify quality inputs and sources of information to budget fuel, preventative maintenance and other variable operating costs
- Develop reports to track actual results vs. budgets

Increasing Market Share with Process – Not Luck

Increasing your company's market share requires 90% process and 10% luck. Does that explain why

your hit rate is so low? Are your numbers more like 90% luck and 10% process? In this program, you will learn how best-in-class organizations fix and overcome this challenge. The best companies position themselves for success by defining a tangible and specific direction, supported by the right

tools that successfully deliver projects, and accounts that will forever transform your organization. We will outline how strategy, structure, business development, systems, and process translate into trust and long-term relationships. When these aspects are in sync, your business will be on a path to

close more than 50% of the projects you pursue.

Learning Objectives:

- Clarify your markets, customers and competitive differentiator
- Understand the three levels of business development and how to capture key accounts
- Evaluate how your current systems and processes support your goals
- Establish an effective business development process that allows your company to gain market share

Purchasing Best Practices

The second greatest risk for electrical contractors is the ability to positively affect the supply chain for materials. In this session, we will discuss concepts behind effective material planning strategies, enterprise level purchasing methodologies, and managing the service levels of our material vendors. Attendees include field leaders, project administrators, project engineers, project managers, project executives, group/branch executives, financial managers, owners.

Learning Objectives:

- How to properly leverage preconstruction planning to drive a proactive purchasing strategy
- How to align risk management between labor and material in order to produce valuable project insight
- Vendor partnership agreement and vendor managed inventory structures and their proper deployment

Enabling Success – Creating Alignment Between Field and Office

For construction firms to thrive, synergy, teamwork and trust must exist between the office and the field. The proper deployment of defined processes and tools will facilitate this critical alignment. This collaboration must begin before mobilization and continue through project closeout. During this session, we will discuss the workflow that must exist in order to mitigate risk and maximize productivity. During this session, we will discuss why the processes of preconstruction planning, short interval planning, production tracking, daily project reports, exit strategy, and lessons learned are critical to the organization. We will also discuss what the benefits are for each member of the team, and how these processes can be properly implemented.

Learning Objectives:

- Describe the information needed to effectively navigate preconstruction planning
- Learn the critical communication required in short interval planning
- Discuss the importance of accurate production tracking
- Identify the needed data transfer of a daily project report
- Outline the data collection required of the project team during closeout and lessons learned

Business Negotiations

During this session, we will learn how to develop and effectively plan a strategy for any negotiation; improve persuasion skills; and learn tools, techniques and practical strategies for negotiation success. Compromise is a no-win situation for either party in a negotiation yet is the most commonly used methodology. We will utilize a mock change order negotiation in order to prove the theory of collaboration versus confrontation.

In this session, we will:

- Discuss the emotional challenges that prevent or hinder successful negotiations
- Outline the steps necessary to achieve collaborative outcomes
- Define the communication skills necessary to de-escalation conflict to achieve a buildable space
- Display the difference between compromise and collaboration

Mergers & Acquisitions: Reasons, Risks & Rewards

Acquisitions that solely seek to consolidate shared services and reduce costs are relatively common in the construction industry. In our experience, ideas for growing profit are almost always predicated on experiences assisting companies in reaching growth targets to drive profitability. The integration of a planned acquisition target might result in different techniques to increase profit with varying degrees of success. This session will show in plain terms the steps to identify, evaluate, close, and successfully integrate an acquisition target to accelerate profits.

Learning Objectives:

- Significant Drivers and Reasons for M&A Activity
- How to Design a Target Operating Model
- Best Practices for Structuring M&A Valuation and Major Risks
- How to Identify Strategic Acquisition Targets
- Integrating Acquisition Targets to Accelerate Profit

Data-Driven Decision Making for Your Business

Because data-driven decision-making is at the heart of today's most profitable companies, tools like Key Performance Indicators (KPIs) provide a critical business edge for decision-making. We will cover the approaches for selecting KPIs, show easy-to-understand processes to ensure predictable business outcomes in several functional areas, and include practical examples and real-world best practices.

Learning Objectives:

- Find out what KPIs are and why you should care
- Learn how to use KPIs to drive profitability in your company
- Discover how you can quickly implement and communicate KPIs to employees

Success in Technology Implementation

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

Advanced Enterprise Budgeting and Forecasting

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 clarity 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

Balancing the Portfolio – Creating a High-Performance Service Group

Having a service and special projects group to help balance the portfolio can create additional financial stability for 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 the 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

Project Financials that EVERY Project Manager Needs to Know

Project financials are a weakness in many organizations, yet our success with our banking and bonding partners relies heavily on this data. Many are left uncertain when it comes to knowing the outcome of projects while they are occurring and experience significant fade or gain at the end of the job that was not predicted. Financial acumen can be the line in the sand between staff being “project managers” versus “project witnesses.” The solution to this is defined standard practices to set your team up to win. In this session, we will discuss the importance of managing cash flow and how to produce accurate project forecasts.

Learning Objectives:

- Outline best practices for producing stellar schedule of values
- Discuss billing and collections standards to focus on getting the cash in the door timely
- List the steps required to produce an accurate project forecast
- Show the tremendous affect labor productivity tracking has on the quality of project financial projections

This is a full day class

ROI from investing in Off Site Production – or Prefabrication

When we poll construction executives regarding their greatest industry challenges, inevitably the #1 challenge is the ability to stay competitive in an increasingly cost-driven marketplace. Other challenges include out of control supply chain, poorly managed projects, decreased productivity, quality control and a shrinking skilled workforce. One solution that impacts all of these challenges is the investment in an internal Prefabrication Process and facility. However, the implementation process can seem daunting, and the investment can be difficult to quantify. The job site is our primary place of business, and that place is not always conducive to a safe, lean installation or predictable outcomes. We believe the answer is to embrace a new business model; one that takes you away from the historical onsite approach to construction and moves you toward a lean standard work model performed in an off-site production space. This session will demonstrate the principles required for this Lean transformation. Further we will provide a methodology to calculate a return on investment from a Prefabrication operation. Attendees include Operations Managers, Project Managers, Project Executives, Group Executives, and Business Owners.

Learning Objectives:

- Calculate a return on investment of a prefabrication facility
- Learn the fundamental importance in the standardization of means and methods
- Lean principles, sustainable management systems
- Benefits of measuring and leveraging key production metrics
- Understanding the power of increasing your standard work
- That gaining control of design to increase predictable outcomes

Specifications:

- 2-hour session
- 75 attendees maximum

Psychological Safety – Building the Right Culture to Enable Organizational Greatness

Alternate title (Human Empowerment: How Great Leaders Set the Stage for Stellar Performance)

Every organization strives for greatness. That greatness comes from the level of engagement and performance of the people within the company. Psychological safety is not about “being nice” or “being comfortable.” Rather, it is creating a culture where input is encouraged and recognized. It is an environment where people are unafraid to ask for assistance or admit making mistakes. It is a space where ideas can be challenged constructively in the desire to pursue continuous improvement.

During this session, we will:

- Discuss the benefits of psychological safety
- List the behaviors to avoid that will sabotage psychological safety
- Outline the questions to ask to determine whether this is a problem for your organization
- Describe strategies for improving leadership practices to create the right environment for engagement

Optimizing an Ownership Transition

This session will explore tools that can be used to optimize, from a tax perspective, the ownership transfer process from existing owners to new owners. Ownership transitions are most often transitions to either family or to a successor management team. Less than 10% of ownership transitions in the construction industry are accomplished through a sale to a third party, either a strategic or financial buyer. A lack of proper succession planning is endemic in the construction industry, as is the understanding of just how long it will take to completely sell stock to the next ownership group and the potential impact on the business.

During this session we will explore tax concepts, such as tax-free reorganizations, gift taxes, and qualified small business stock gain exclusions, and discuss their applicability to contractors. Moreover, we will provide examples demonstrating the tax savings available, how this benefits the business and hastens the ownership transition.

Learning objectives:

- Provide examples of traditional ownership transitions to demonstrate how long it takes to complete the transition and how the pace of the transition can impact a contractor's growth.
- Understand and quantify the tax consequences of traditional methods for transferring ownership to a successor management team through bonuses or other forms of compensation.
- Explore tax concepts that can be utilized by contractors to mitigate the tax consequences of the ownership transition.
- Demonstrate how a tax-free organization works and quantify the benefits of this approach to business and owners.
- Provide an example of a qualified small business stock gain exclusion and quantify the benefits to the owners.

What is a Captive Insurance Group and What Can it do for Your Company

There are over 9,000 captive insurance companies in the U.S. The term “captive insurance” is used broadly, and it is important to understand there are many different types of captives. We will explore the different types of captives and how they benefit the companies that participate in them. The end game is turning a large, fixed cost into an investment that also provides a pricing advantage in the form of more predictable rates for workers compensation, auto and general liability insurance coverage. A well run captive will return 40-60% of the premiums paid in back to the owners in the form of dividends. We will also discuss the peer group effect of captives and how it tends to make good companies even better.

During this session, we will:

- Discuss the benefits of captive insurance programs
- Understand the different types of captives
- Identify the profile of companies that can benefit from a captive
- Turning a fixed cost into an investment

Data Based Project and Field Management

The construction industry is experiencing a transition between gut and experience led decision making and those based on data and analytics. Our youngest generations of staff and field are most comfortable with the shift towards the use of technology and data. The challenge is that moving our business models, workflows, and training in that direction takes time and focus to accomplish. We will discuss best practices behind definition, implementation, training, and engagement when moving our operations to this more objective, fact-based model.

During this session, we will:

- Discuss why the need to shift to this model is necessary
- Outline the benefits of data-based project and field operations
- List the workflows required to be defined in order to provide quality information to stakeholders
- Show the financial transparency and predictability of outcomes this provides

Project and Field Management Introduction - The Necessary Skills for Success.

In the construction industry, opportunities to promote from within are abundant. How do we best prepare those candidates for success? This course will discuss the basics needed to facilitate greater and quicker success for those climbing the ladder. During this session, we will discuss the foundational concepts of:

- Contract startup and terms
- Preconstruction planning
- Job cost management
- Scheduling
- Labor productivity
- Forecasting

Standardizing Workflow – Add Speed to the Project Life Cycle

Most contractors struggle to eliminate the internal rework caused when the work crosses from silo to silo. Creating workflow with the end in mind, taking into consideration the viewpoint of critical stakeholders, minimizes waste and maximizes operational effectiveness. Speed is imperative when positioning your teams to win but must be balanced with quality and predictability of outcome.

During this session, we will discuss:

- Creation of standards to align vision for all key internal stakeholders
- Documentation of workflow to enable training and implementation success
- Definition of metrics and KPIs that measure adherence to the process and provide accountability to key responsible parties
- Discussion of example workflows to show alignment between people, process, and technology deployment

Driving Organizational Performance and Innovation through Peer Groups

Peer groups are considered one of the best forms of executive learning. Peer groups provide you with the opportunity to learn from top performing organizations and access the experience of successful construction leaders in your discipline and vertical markets. Peer groups afford the opportunity to have open and candid conversations about business challenges, openly benchmark against financials, compensation, insurance and other key areas to identify opportunities for improvement. The fast pace of change in our industry necessitates a broader lens and deep exposure to how other companies are adapting technology, leveraging AI, overcoming workforce shortages, improving margins and increasing the enterprise value of the company. Come explore what peer groups are all about and how best in class groups are run and the results they generate.

Learning Objectives:

- Understand different peer group formats and how they drive organizational performance and innovation
- See benchmarking tools in action and how they shine a light on underperforming areas of the business
- Understand how peer groups grow and gain a larger footprint in your business as more leaders are exposed to the group
- Understand how accountability for change and improvements are driven

Project Rescue

Ugly projects can happen. This session will help you identify warning signs, preventative measures as well as rescue tips to minimize loss and increase successful completion without burning bridges. Contract negotiations, good project schedules, quantity of RFIs and CORs, executive involvement and collaboration with other trades will also be discussed.

Learning Objectives:

- Identifying a project heading south
- Investigating the why
- Course correcting for a profitable outcome
- When and how to take legal action

Giving and Receiving Feedback

Learn to give and receive feedback effectively in this session. Explore what is happening in the brain when receiving feedback. Learn constructive communication techniques, active listening, and the art of using feedback for growth. Perfect for anyone looking to enhance their professional and personal relationships.

Learning Objectives:

- Emotional response to feedback
- Honesty in giving feedback
- How to do it successfully
- Asking for feedback

Construction Financial Basics – Literacy for All Levels

The business of construction contains within it many financial complexities. It is critical to get the basics correct before creating a system that only a CFO can understand. It's far more important that each level in the organization has the financial acumen required to be able to manage financial risk and help contribute to the bottom line. In this session, we will discuss the foundational principles of construction accounting so that each team member can fully comprehend the vocabulary utilized, flow of revenue, and their role in the success of the financial transparency desired.

During this session, we will:

- Define basic accounting terms for universal understanding
- Discuss the principles of cash in such as AR, billing and collections strategies
- Outline the payables process including invoice processing, reimbursements and credit card usage
- Discover the principles of a general ledger and why this level of information is necessary
- Present the fundamentals of proper job cost management

Mitigating the Impacts of Tariffs

The construction industry faces significant challenges due to fluctuating material costs and tariffs on essential resources such as steel and aluminum. These financial pressures impact project budgets, contractor margins, and overall project feasibility. This presentation explores strategies to mitigate these risks through contractual safeguards, procurement adjustments, and alternative material considerations. Attendees will gain insights into leveraging escalation clauses, negotiating favorable contract terms, and adopting innovative sourcing solutions to manage cost volatility effectively.

Learning Objectives:

- **Understand the Impact of Tariffs and Material Costs** – Analyze how tariffs and rising material prices affect construction projects, contractor profitability, and overall market trends.
- **Explore Contractual Strategies for Cost Recovery** – Identify key contract provisions, such as force majeure and escalation clauses, that can help contractors manage financial risks associated with material cost fluctuations.
- **Implement Risk Mitigation and Procurement Solutions** – Learn how to adjust procurement strategies, explore alternative materials, and utilize tariff exemptions to minimize cost impacts on construction projects.

Measuring Productivity – The Ultimate Tool to Guide Project Success

The need for data-based field management has never been greater than today. With projects and their ever-tightening schedules, identifying wins and fades early is critical. In addition, self-performing contractors must use data in building a fact-based case of impact, increasing the chances for reimbursement for labor fades caused by external sources. For labor fades stemming from internally driven sources, an early recognition is key to positively impacting the outcome. The change necessary for proper implementation include procedural, cultural, and operational focuses to ensure alignment and trust throughout the system.

During this session, we will discuss:

- Why measuring productivity is such a critical issue
- The impact of measuring productivity
- The necessity of alignment of material and labor data for causation analysis
- Processes of measuring productivity to ensure success
- Utilizing labor productivity data to win

Optimizing the VDC Process

VDC can evolve from a design coordination tool into a powerful driver of downstream value in MEP firms—unlocking efficiencies in prefabrication, material handling, and field installation. Success requires aligning all teams—project management, VDC, prefab, and field—around defined roles within an integrated execution strategy.

Learning Objectives:

- Understanding and Fulfilling Internal Customer Needs
- Documenting Standard Work by Phase of Construction
- Defining and apply Design for Manufacture and Assembly (DFMI)
- Utilizing KPI's to Measure Performance
- Understanding Cost of Quality and impact on Operations
- Establishing Closed Loop Execution Systems

Recruitment and Retention – The Keys to Managing Risk and Increasing Profitability

Great organizations understand that the keys to their current and future success lie in the hands of their employees. Hoping that your employees know how to do their job to the maximum level of effectiveness is a shaky strategy at best. Great processes that define how to recruit, develop, measure, compensate, and promote within the organization are key in creating an enduring organization. Best practice dictates the ability to recruit toward the bottom of the org chart and develop those with ability as quickly as possible, allowing them to rise within the walls of the same company, making the opportunities there outshine the option of leaving.

During this session, we will discuss:

- Creating structure in the hiring process to test for knowledge, passion, and cultural fit
- Implementing strong employee development processes driven by defined workflows and comprehensive adult learning concepts
- Defining an effective career path mapping process so that the employee plays the driving role in their own career choices
- Discussing employee engagement principles and the 5 key principles that must be followed
- Outlining effective performance management and incentive compensation principles to gain results

Project Risk Analysis & the Strategic Review of Your WIP

The WIP is normally seen as the one of the significant financial documents that financial and corporate leaders utilize to determine current and future financial health. It is difficult, however, to have tremendous faith in the data it contains as so much of it is contributed to by operations. This is a significant challenge as there appears to be a lack of financial training in the operations side of our industry, leading to less focused, and certainly less accurate, data landing on the WIP statement. For the WIP and project forecasts to be utilized not just as a financial instrument, but as a tool to depict the performance of each and every project, collaboration and education is beyond critical.

Learning Objectives:

- Discuss why math and hope do not mix in predicting project performance
- Understand the use of data to calculate project financial standing
- Utilize WIP metrics to identify projects requiring intervention and/or recovery plans
- Review the use of reports and dashboards to highlight key performance indicators
- Define the necessary capture of the causes of margin changes in order to ensure proactive project management and enterprise level learning

Labor Negotiations

Team Building: Creating a Successful Labor-Management Culture

When Labor and Management have a strong team culture, it creates an environment that allows for positive, continuous improvement for everyone and is necessary to attract and retain the best and brightest employees in our industry. Discover how Labor and Management can align visions to escalate mutual success. In this session, we will:

- Discuss aligned vision for Labor and Management

- Describe “bottom up” philosophy and why it is so tremendously successful

- Discover how internal subject matter experts become catalysts of change

Negotiating Conflict Between Labor and Management

Conflict is apparent in every aspect of the construction industry and is not unique to Labor and Management. Compromise is a no-win situation for either party in a negotiation yet is the most commonly used methodology. Participants will learn the basics of good negotiation practices, how to identify the techniques to use to consistently achieve beneficial results. In this session, we will:

- Define the four steps to successful negotiations that are necessary to achieve collaborative outcomes

- Discover communication skills that allow for the de-escalation of conflict

- Discuss how perceptions and emotions contribute to conflict and steps to prevent them from influencing negotiations

Critical Communication Skills for the 21st Century Construction Industry

In our industry today, we are providing leadership to three or more generations of human capital, with differing personalities and perspectives. While we understand that there are significant differences in these generations, it is critical that Labor and Management representatives understand how to assess their own communication style as well as those they work with for all to succeed. Cultural or personality clashes are costly in many ways and are often attributed to communication skill gaps. Learn how to identify these challenges and put in place an effective improvement program. In this session, we will:

- Define the role of leadership in communication

- Discuss the generational differences and how their leadership and communication styles differ

- Discover the differences in personality types and tools to effectively assess and bridge this knowledge gap

Project Manager and Field Leader Academy Topics

Project Planning: From Preconstruction to Closeout

This session will examine the value and positive impact of a well-planned project and explore the different types of plans that could be developed. Planning does not end when the project starts, and we will discuss how to lead planning from the beginning of the project all the way until the customer accepts the finished project.

Time Management: Achieving Maximum Personal Productivity

Personal productivity is about self-management and improving habits to maximize your use of time. We will review several tips to improve your skills and conduct a self-analysis of your use of time so we can apply the lessons learned. We will also discuss the importance of prioritizing and applying lessons that can improve your work life balance.

Resource Control: Managing Your Critical Project Resources

This session will discuss the management side of knowing the status of and controlling the various resources that need to be managed for a successful project. The systems, metrics, reporting tools and what to do with the information are important success factors in being a great project manager whether your resources are people, materials or equipment.

Customer Relationships: Developing Customers for Life

Construction is a service industry and how we treat our customers impacts the success of the project and business. This session will drive home the importance of developing great customer relationships and how to navigate dissatisfaction when it occurs. We will explore the one question that needs to be asked to ensure your customers are happy and how to keep them coming back for years.

Contract Administration: Crossing the T's and Dotting the I's

This is not the glory topic, but it may be the most important aspect of a project managers role when it comes to mitigating risk and protecting the company. We will review the pitfalls and lessons that every PM must be watching on their contract and tell a few stories to illustrate the importance of thorough contract administration.

Effective Communication: Learn and Avoid the Roadblocks to Great Communication

One survey reported that Project Managers spend 90% of their time communicating. We will explore the mediums of communication and discuss how to be more successful communicators by knowing ourselves better, avoiding roadblocks to communication and listening better. Participants will learn skills that will help them be more efficient and improve their relationships internally and externally.

Job Cost Management: Understanding Basic Job Cost Management Principles, Earned Value, and Cash Flow Basics

Project managers need to understand basic financial information and should be able to connect the financial performance of their project to the performance of the business overall. In this session, we will explain the basics of Earned Value Management, job cost accounting and explain key concepts such as cash flow and profit. The project manager will gain deeper appreciation for the importance of actions that impact profitability, reporting and cash flow.

Driving Project Success: Keys to Improving Productivity

How can the project manager improve productivity? This session will explain how by reviewing the keys to minimizing waste and inefficiencies' as getting the best effort from the field forces. We will provide practical tools that can be implemented by the managers to lower the cost of production.

Project Leadership: How Leadership Differs from Management

Project managers are also project leaders. We will explore both management and leadership behaviors and explain how they are different. We will discuss what effective leadership looks like and how to lead more effectively.

Goal Setting and Action Planning

At the conclusion of the program, we will provide participants with the opportunity to set goals and develop personalized action plans for their development. The purpose of this session is two-fold. We are seeking to help participants make the learning stick by defining and committing to make changes when they return to the office. Secondly, we strive to encourage goal setting behavior by teaching how to set goals and develop plans to achieve those goals.

PM & Field Leader Level 100

The program will begin with the organizational focus and then will shift to a strategic focus to ensure a holistic view of the business and will include the following:

Session 1 – Overview of the Building Blocks of a Successful Contractor model, program objectives and expectations. Marketing, sales and business development will also be covered.

Session 2 – Estimating Basics including plan reading, quantity takeoffs, material pricing, and assignment of job overhead.

Session 3 – Estimating Basics continued including development of RFP's and presentation skills training.

Session 4 – Effective Pre-Construction Planning including estimating turnovers, pre-job planning, short interval scheduling, daily production targets, exit strategies and lessons learned processes.

Session 5 – Project Management Basics including contract administrations, submittals, RFI's, drawing logs, knowledge management structures, and document control systems.

Session 6 – The Impact of Standardized Work including a case study on merit shop electrical contractors performing 75% of their labor hours in a controlled facility.

Session 7 – Equipment Management Best Practices including system setup, establish a profit and loss statement by equipment category and each piece of equipment, use of telematics, preventative maintenance programs and asset acquisition and divestiture. Additionally, scheduling basics including forward and backward passes as well as logic ties, resource loading, progress overrides, line of balance scheduling and building an effective WBS.

Session 8 – Job Cost best practices including system setup budgets, SOVs, billings, collections, change control, and earned value analysis

Session 9 – Supply Chain management including the importance of managing all the "ing's" such as finding material, pricing, ordering, inventorying, delivering, billing, etc. Additionally, an introduction to business strategy and supporting organizational structures.

Session 10 – Organizational and leadership development including effective communication, relationship building and team building.

At the conclusion of the level 100 program participants will have a basic understanding of a broad range of topics critical to contractor success.

PM & Field Leader Level 200

The program will expand upon and dive deeper into the topics presented in Level 100 and will include the following:

Session 1 – Project Management I (Killer Contract Clauses, Claims, Change Control, Lawsuits).

Session 2 – Project Management II (Negotiations, Problem Solving, Conflict Resolution).

Session 3 – Project Management III (Management vs Leadership, Fast Paced Business Communication, Employee Engagement).

Session 4 – Finance I (Introduction to Balance Sheet, Income Statement, Statement of Cash Flows).

Session 5 – Finance II (Ratio Analysis, Sample Financials, WIP, Fraud).

Session 6 – Finance III (Banking, Bonding, Insurance, Economic Forecasts).

Session 7 – Manufacturing I (Value Stream Mapping, Radar Charts, Roles and Responsibilities).

Session 8 – Manufacturing II (Swim Lane process mapping and relational process mapping).

Session 9 – Manufacturing III (Workplace Organization, Material Requirements Planning, Demand Planning).

Session 10 – Technology (ERP Systems, Technology Strategy, Mobile, Cloud, Integration of Systems).

At the conclusion of the Level 200 program, participants should have a much broader perspective on not only the industry, but the practices successful contractors follow and their role in contributing to that success.

PM & Field Leader Level 300

The program will expand upon and dive deeper into the topics presented in Level 100 & 200, will shift to a case study format requiring participants to do homework in advance of the session, will provide an opportunity to practically apply what they have learned and will include the following:

Session 1 – Case Study I & II (Strategic Diversification Problem – 90% of work in one vertical) & Case Study II (Organizational Structure Problem – Business has outgrown structure)

Session 2 – Case Study III (Organizational Culture Problem – Toxic Employee that makes the company a lot of money)

Session 3 – Case Study IV (Leadership Problem – Lack of Leadership)

Session 4 – Case Study V (Business Development Problem – Pipeline Management)

Session 5 – Case Study VI (Estimating Problem – Huge Bust – Pricing Issue or Execution Issue)

Session 6 – Case Study VII (Project Management – Juggling Lots of Issues, What takes Priority and Why?)

Session 7 – Case Study VIII (Procurement Issues – Everyday ordering, missed critical releases, supply chain development)

Session 8 – Case Study IX (Claims problem – Schedule delays, trade stacking, concurrent delay arguments, loss in productivity, dilution of supervision, etc.)

Each case study will be based on actual electrical contractors (sanitized for confidentiality) and will require participant to evaluate the organization from multiple dimensions including but not limited to, business development, marketing, finance, execution, cultural, leadership and employee engagement.

At the conclusion of the Level 300 program, participants will have practical experience applying the skills they learned in Levels 100 & 200.

Hard Skill Competencies

Plan Reading

Reading construction blueprints is a foundational skill in construction. Participants will learn the foundational knowledge needed to understand how to navigate blueprints and specifications.

Quantity Takeoff & Construction Math

Understanding the fundamentals of construction math is critical for any estimating activities. Participants will use hands-on exercises to learn the math skills necessary to provide quantity take-offs for electrical estimates.

Project Management – Job Track

Successful utilization of Job Track provides ensures that projects are managed according to Sequoyah's process. Understand the information and process that are utilized to update budgets, charge time, quantities, look-aheads, etc.

Safety – Accident Prevention & Loss Control

A commitment to safety is an ethical, financial and moral decision that contractors make on a daily basis. Learn the fundamental requirements of Sequoyah's Safety program and the tools that help with compliance on every project.

Surveying & Layout

Successful projects kickoff the construction phase with accurate surveying and layout techniques that bring the design and engineering to life.

Managing Project Financials

Understanding the relationship between financial management and project performance requires knowledge of Earned Value Management, job cost accounting and key concepts such as cash flow and profit.

Prefabrication

Prefabrication is the key to improving productivity in the field and impacting bottom-line profitability. Understand how Sequoyah is embracing prefabrication to encourage manufacturing of materials that are delivered ready-to-install to the site, reducing time spent looking for the right materials, parts and tools.

Design Standards

Predefined design standards are fundamental to a successful prefabrication practice. Learn about the identified Sequoyah standards that are utilized in design and construction to increase efficiency in fabrication, installation and profitability.

Soft Skill Competencies

Mentoring & Motivating Others

A leader's ability to mentor and motivate others is essential to improving individual and team performance. Skilled leaders are able to set goals, offer praise, admit mistakes and provide a supportive environment for individual and team growth.

Problem Solving

A critical component of effective communication, problem solving requires that you evaluate long and short-term considerations, gather facts, and utilize an accurate evaluation process.

Negotiation Skills

Compromise is a no-win situation for either party in a negotiation yet is the most commonly used methodology. Participants will learn the basics of good negotiation practices, how to identify the techniques to use when negotiating with contractors, subcontractors, employees, and others and how to consistently get beneficial results.

Customer Service

Develop great customer service skills and understand how to navigate dissatisfaction when it occurs to protect the relationships that impact the success of the project.

GC/Subcontractor Relations

Great managers are respected as trusted partners by the other contractors on the project. They deliver the promised results, provide sound advice relative to their trade, and are trusted by others to make the job successful.

Leadership Curriculum

Emotional Intelligence for Business

In Emotional Intelligence for Business, you will develop your capacity for recognizing your own emotional state, in real time, and managing those emotions based on the need of the social situation at hand. This awareness and behavior modification will increase your ability to work through stress and build effective relationships, both professionally and personally.

Learning Objectives:

- Develop the participants' capacity for understanding their emotional states
- Through awareness and behavior modification, increase the ability to work through stress and build more effective work relationships.

Agenda (Typically 2-Day Workshop; Can Be 1-Day)

✓ Day One

- Defining EQ
- The business case for EQ
- Neuroplasticity/brain function
- Self-awareness
- Strategies & Action Planning
- Self-management
- Strategies & Action Planning

✓ Day Two

- Social Awareness
- Strategies & Action Planning
- Relationship Management
- Strategies & Action Planning
- Making commitments to take back to the job

Emerging Leaders Workshop

This highly interactive 2-day workshop, designed for managers-of-people, is designed to deliver practical managerial tools, as well as foster a powerful new perspective on the value of leading others. The workshop approaches this skill-development, focusing on the four key areas of leading others: Strategy, Attitude, Inquiring, and Feedback.

Learning Objectives:

- Develop the participants understanding for core leadership skills that are particularly helpful at the mid-levels of leadership.
- Through interactive activities, participants will practice their leadership skills and will develop a specific plan to deliver these skills back on the job.

Agenda (2-Day Workshop)

- ✓ Learning to give, and receive, business feedback
- ✓ Reflection on and adjusting leadership styles, based on a direct reports' needs
- ✓ Leading by example; learning to create a positive, calming attitude
- ✓ Connecting the strategy of your department's work with the overall organization
- ✓ Learning to coach and delegate, using the "Task-Based Leadership" model
- ✓ Identifying successful techniques to approach conflicts, and difficult discussions
- ✓ Building the powerful skill of Active Listening
- ✓ Building the powerful skill of Inquiring, to get to the root causes of issues
- ✓ Understanding a few, fairly common legal themes for new managers
- ✓ Recapping commitments; taking the learning back to the job



Project Management (Leading Teams)

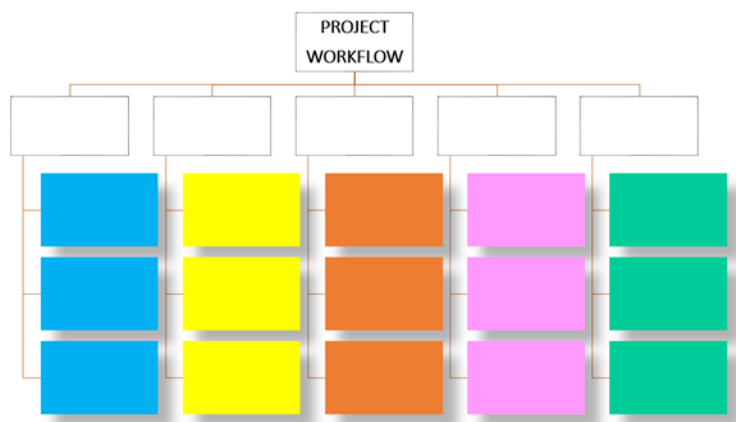
This course is designed to improve the participant's ability to lead teams by kicking off projects with clear roles and responsibilities, a team-built project plan, effective upward communication, and a vision for success. This interactive workshop provides a simulation for team members to learn how to visually create a project plan, using their team to identify and understand each other's milestones, deliverables, and specific tasks. Participants learn the value of clear and interactive planning, to avoid miscommunications and conflicts.

Learning Objectives:

- Develop the participants' ability to collaboratively establish a project plan for projects of a small to medium size, including process changes, technology rollouts, or cultural initiatives.
- Through simulation and practice, participants will practice and learn how to use a few collaborative team project management techniques, such as the Work Breakout Structure (creating a visual project plan) and Project Charters.

Agenda (4-Hour Workshop)

- ✓ Learn the root causes of poor teams, and poor team results
- ✓ Learn team project management techniques, including Work Breakout Structure
- ✓ Learn how to establish clear roles and responsibilities – e.g. RACI charts
- ✓ Learn how to hold team members accountable for their tasks and for communicating to other team members
- ✓ Learn how to put together a clear project plan
- ✓ Learn how to create a Project Charter
- ✓ Learn to communicate effectively within the team, and upward to senior management



Active Listening

This course is designed to increase the participant's listening skills, emphasizing active listening techniques. Participants will practice their listening techniques in pairs, and in larger groups.

Learning Objectives:

- Develop the participants' empathy and ability to listen actively to others
- Through interactive activities, participants will enhance the core leadership skill of active listening—appreciating the value of pausing, breathing, and listening to others. Participants will develop a plan to implement this skill back on the job.

Agenda (1-2 Hour Workshop)

- ✓ Why active listening is a critical activity
 - Listening is purposeful, requires control, and requires total focus and engagement
 - Listening is the front end of decision making
- ✓ Steps in active listening – FOCUS
 - Free your mind
 - Observe the speaker
 - Comment on what you heard and encourage
 - Uncover facts or feelings
 - Summarize and gain agreement
- ✓ 10 Keys to effective listening
 - Find areas of interest, listen for content not delivery, “stop loadin’ yer guns”, listen for ideas, be a flexible note-taker, focus on listening , resist distractions (phones, email, etc), exercise your mind, keep your mind open, thought is faster than speech; repeat back what you heard until the speaker agrees
- ✓ Active listening exercises

Business and Email Writing

Being able to write in a clear and professional style is critical to effective leadership, and to one's career. This course will focus on improving the participant's ability to write, so that their readers will receive clear, concise, and effective messages. Through this training module, participants will reflect on their own areas to improve, and will create an individual approach to resolution.

Learning Objectives:

- Develop the participants' ability to write effective emails that are both concise and highlight critical areas of information.
- Through practice and instructor-feedback, participants will enhance their writing skills, to create emails that are easier to read and therefore are more likely to be read.

Agenda (3-Part; 2-Hours Per Part Workshop)

- ✓ Target audience overview
 - WIIFM (What's in it for me?)
 - Research your audience before making assumptions
 - Exercise: Write an email to 4 different types of people
- ✓ BAM!
 - Capture the reader's attention
 - Exercise with different emails – Find the BAM!
- ✓ Structure
 - Inverted pyramid, Grouping information, polite openings, examples
 - Activity: In groups, move index cards around in the "right order"
- ✓ Oxygen: creating writing that is open, readable, and to the point
- ✓ The importance of grammar, spelling, and editing



Perhaps no area can have such a positive impact as clarifying, and communicating, roles and responsibilities across a department, and even outside of that department. The collection of roles & responsibilities involves brainstorming, bucketing responsibilities into categories, prioritizing, and then determining who to communicate to. On occasion, communication of roles & responsibilities may include upper levels to gain alignment around expectations for specific roles.

Learning Objectives:

- Develop the participants' appreciation for, and skill in developing, clear roles and responsibilities for their teams.
- Participants will learn interactive techniques to have their teams clarify both their responsibilities at work and the service level agreements between roles.

- ✔ Why Assess Roles and Responsibilities
 - What are roles & responsibilities
 - What have leaders noticed when expectations are unclear? Clear?
- ✔ Real scenarios of conflicts with unclear roles as the root cause
- ✔ Following the TAFLAT process to clarify roles and responsibilities
- ✔ Bring this process back to your team(s); strengthening your team(s)

Label Management	Web/e-commerce	Print / Design	IT	Business Development
- Manage U.K./CN regulatory compliance - Follow-up with required registration/evidence from UK - Update labels per vendor requirements - Follow label control process - Schedule production for this C&P products	- Investigate fraud orders – follow up with customer on shipping - Check if any UK or CN labels are missing - Check if any UK or CN labels are damaged - Check if any UK or CN labels are expired - Check if any UK or CN labels are missing - Check if any UK or CN labels are damaged - Check if any UK or CN labels are expired	- Manage internal labels for kits, warehouse, shipping - Design labels for products, labels - updates / change control, production coordination with printer - Catalogue updates when needed - Mock-up / print for distribution - Research booklets - print for distribution - Order business cards, sales letters, brochures - Outsource printing when needed - Process vendor invoices - Supplement facts - maintain files for website, website / Mailings - Product sheet - update when needed - Product sell sheets - maintain inventory, update when needed - Maintain Supplement Facts, Product Images - Update when needed send to distributors upon request.	- Manage servers - Source new retail (B&M) or online distributors – evaluate their strategy - Contact buyer / source contact info - Review contract / price negotiation - Account setup w/ distributor required paperwork. Source information needed with C&P - Follow up with initial orders – track prices - Coordinate w/ signed distributors - Setup / manage promotions - Conduct research on source required materials - Setup distributor account in order to track price - Conduct initial order / verify against submitted Purchase Order - Order - Follow up with tracking and invoice	- Source new retail (B&M) or online distributors – evaluate their strategy - Contact buyer / source contact info - Review contract / price negotiation - Account setup w/ distributor required paperwork. Source information needed with C&P - Follow up with initial orders – track prices - Coordinate w/ signed distributors - Setup / manage promotions - Conduct research on source required materials - Setup distributor account in order to track price - Conduct initial order / verify against submitted Purchase Order - Order - Follow up with tracking and invoice

Managing Priorities/Time Management

This course is designed to improve the participant's ability to get the most out of each day through actively managing time spent on high priority action items. Participants will learn to deliver against their priorities by reducing the impact of "time wasting traps".

Learning Objectives:

- Develop the participants' awareness of the root causes of mismanaging time, including gaining clarity on their priorities and delivering priorities to their teams.
- Participants will leave the workshop with an action plan to increase the likelihood that their priorities and their team's priorities will enhance their effectiveness.

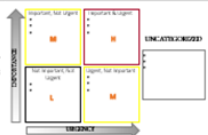
Agenda (3-Hour Workshop)

- ✓ Identifying your priorities
 - Listing your tasks and using the priority matrix
 - Shiny objects and other common traps
- ✓ Understanding time management
 - Envisioning the ideal day versus actual day
 - Defining "What's In; What's Out!"
- ✓ Planning is the key to managing priorities
 - Developing annual, quarterly, weekly goals, and connecting daily goals
 - Setting and sticking to your schedule
- ✓ Reviewing progress and making changes

PRIORITIZATION WORKSHEET

YOUR TASKS OR PROJECTS	PRIORITIZATION			RATIONALE	PERCENTAGE OF TIME YOU ARE SPENDING ON THIS
	IMPORTANT	URGENT	EMUL		

A Simple Tool for Identifying Priorities



Self-Awareness and Interpersonal Communications

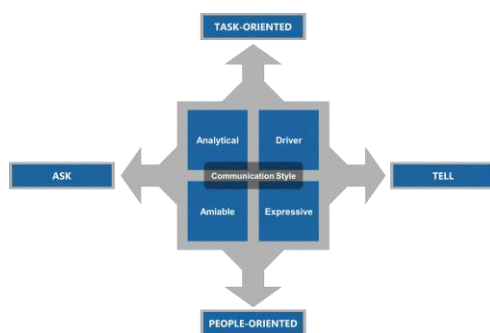
The course is designed to help you learn more about different Communication Styles, including your Style, others' Styles, and how to adjust to be the most effective leader. In addition, the course builds skills to allow participants to provide effective feedback, both positive and constructive. This course draws on team theory and communications models to solidify trust within a team, thereby fostering high-performing teams.

Learning Objectives:

- Develop the participants' emotional intelligence through the lens of Communication Styles.
- Participants will learn techniques to adjust their styles to others, to increase the effectiveness of their communications.

Agenda (2-3 hour workshop; can be enhanced with the module "Delivering Feedback Effectively" to a 3-4-hour workshop.)

- ✓ Communications Styles – assessment and activity
 - Understanding various Communication Styles
 - Gaining insight into your own Style
 - Learning how to adjust your Style for others
- ✓ Feedback Model – Context, Behavior, Effect (+ consequence)
- ✓ Team development and building trust within the team
 - Understanding Lencioni's Team Development model
 - Communicating effectively within the team
 - Team Activity: scenarios; techniques to facilitate communication



Communications & Overcoming Objections For Salespeople

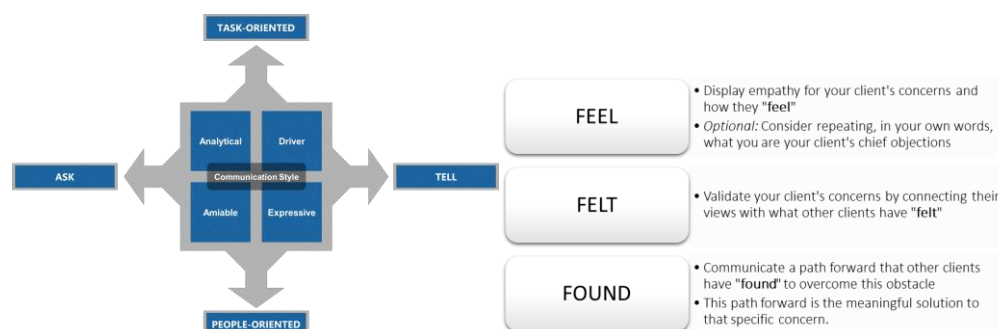
The course is designed to help you learn more about different Communication Styles, including your Style, others' Styles, and how to adjust for your clients. In addition, the course builds skills to allow participants to overcome objections in a Sales situation. This course draws on Communications and Overcoming Resistance frameworks, to strengthen Emotional Intelligence and Empathy for customers. Course participants walk out with practical, and practiced, skills to use in a Sales situation.

Learning Objectives:

- Enhance the results of sales meetings by increasing the participants' emotional intelligence through the lens of Communication Styles and techniques to overcome objections.
- Participants will gain a deeper understanding of styles of communicating, and will learn techniques to adjust their meetings, emails, and other communications to their prospects' (or customers') preferred styles.
- Participants will learn, and practice, a technique to overcome many objections to the sales process to increase the likelihood of a smooth sales meeting.

Agenda (3-Hour Workshop)

- ✓ Communications Styles – assessment and activity
 - Understanding various Communication Styles
 - Gaining insight into your own Style
 - Learning how to adjust your Style for your clients
 - Mapping your top clients, their likely Communication Style, and adjusting your verbal and written communications
- ✓ Overcoming Objections Framework – Feel, Felt, Found (+ affirming & validating objections)
 - Understanding Objections – affirm and validate to show you've heard your client. This section includes brainstorming of common objections.
 - Applying "Feel, Felt, Found" in a way that displays the ability to put yourself in your client's shoes, and provide a new way to think about the area of objection



Creating and Delivering Effective Presentations

Whether it's a keynote address or a presentation for a few colleagues, you still have to capture attention and hold it. This training is for individuals or groups, the smaller the better, to help participants create and deliver effective presentations. This course employs storytelling techniques to significantly improve the ability to relay information in a manner that is more compelling and so will be remembered.

Learning Objectives:

- Participants will gain an appreciation for the art of storytelling in presentations.
- Participants will reexamine their presentations and develop new presentations.
- Participants will practice presentation techniques to increase the effectiveness of their delivery of information.

Agenda (3-Part Workshop; 3-Hours Per Part)

- ✓ Telling a story
 - The power of storytelling; stories widely used in the business world
 - Knowing your audience's interests
 - Capturing your audience's attention from the beginning
 - Read your audience
 - Know your subject
- ✓ Create your story structure – story boards
- ✓ Use visuals versus text
 - Show processes
 - Use visuals to paint pictures
- ✓ Writing tips and tricks – Common Errors
- ✓ Deliver presentation
 - Rehearse and practice – videotaped
 - Control your voice: tone and speed
- ✓ Close by letting audience know exactly what you need them to do

Leading by Example

This course is designed to promote leadership behavior, through modeling the right behavior. The job of a manager is to get the system running; it is the job of the leader to turn on the system, and, more especially, to get others to turn it on. The course covers four ways to do this: Set the right example (e.g. the 19th century model of a cavalry officer), Act the part (demonstrate that you are in charge and that you have what it takes by being willing to get out of your skin and connect with others), Handle the tough stuff (pick your moments to battle carefully and persevere), Put the team first (learn to stand in the spotlight when things go poorly).

Learning Objectives:

- Participants will reflect on the best leaders they've worked with, identifying the qualities that made them so. Participants will be afforded the time to consider their own leadership style, connecting their aspirations to their genuine styles.
- Participants will learn the most critical elements of leading a team, building their teams' trust in them when things go well, or not.

Agenda (6-Hour Workshop)

- ✓ What makes a great leader v. a good manager?
 - Small team activity and group debrief
 - Leadership Principles
- ✓ Setting the right example
 - Stories and examples
 - Walking the talk
- ✓ Act the Part
 - Stories and examples
 - Trying something new
- ✓ Handle the Tough Stuff
 - Stories and examples
 - How to pick battles
- ✓ Putting the Team First
 - Stories and examples
 - Standing up when things go wrong

Training Others

In many instances, excellent leaders train their employees to pick up new skills and goals. This course is designed to improve a supervisor's understanding of when and how to use training, coaching, or projects to develop their staffs. The course builds the supervisor's ability to use time-tested training techniques, by demonstrating these techniques, and building their confidence as an instructor.

Learning Objectives:

- Participants will learn the core training skills, increasing their skill in transferring knowledge and skills to others.
- Participants will learn, and practice, numerous techniques to actively engage learners to most effectively transfer knowledge and skills.

Agenda (1-Day Workshop)

- ✓ Principles of Adult Learning
- ✓ Training Techniques
 - Icebreakers, Energizers
 - Brainstorming
 - Case Studies
 - Demonstrations
 - Gallery Walk
 - Group Feedback
 - Observation
 - Reflection
 - Role Playing
 - Storytelling
- ✓ Creating a Learning Environment
- ✓ Pre-Work, Post-Work and Tracking Training Effectiveness
- ✓ Put It Into Action – Practice Training

Task-Based Leadership: Coaching & Delegation

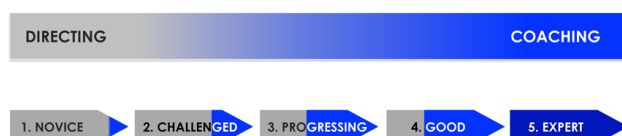
This interactive course is designed to improve the participant's ability to coach individuals and teams to higher levels of performance. The course emphasizes Task-Based Leadership– a model that provides invaluable tools to help the leader spend his/her time on the right areas for his/her direct reports (i.e. those improvement areas that have been agreed to by both the direct report and the coach).

Learning Objectives:

- Develop the participants' appreciation for, and ability to, delegate tasks.
- Participants will create a strategy to delegate specific tasks to direct reports, considering the current skill levels of those people and the style of coaching that will best support their take-over of those tasks.

Agenda (3-4 Hour Workshop)

- ✓ What is a great coach?
 - Participant activity: sharing personal examples
 - Famous coaches: their philosophies and behaviors
- ✓ Coaching Individuals
 - Scattergram: people are experts in some areas, and weak in others
 - Using Task-Based Leadership/Coaching



- ✓ Coaching Teams
 - Setting a clear vision, with understandable and achievable stretch goals
 - Establishing clear roles and responsibilities, and aligning team goals with rewards and recognition

TASK	RISK	TIME COMMITMENT	DELEGATE? Y/N	CANDIDATE/S

Conflict Management

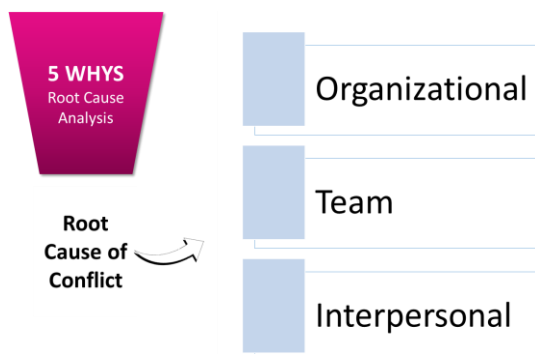
This course is designed to improve the participant's ability to identify interpersonal, inter-team, and inter-departmental conflicts, and better isolate the root cause of these issues, understand their role as a "manager of others" in managing conflict, employ the Disciplinary Process and Performance Management tools, as needed, and employ conflict management tools (e.g. CBI Feedback Model, Communication Styles, Lencioni's Team Model) to improve those situations mentioned above.

Learning Objectives:

- Participants will use leadership and LEAN tools to collaboratively gain an understanding of the root causes of conflict.
- Once these root causes are understood by all, participants will learn invaluable techniques to manage conflicts, reducing tension, and allowing their teams to focus on the work.

Agenda (4-Hour Workshop)

- ✓ Opening: Understanding the Cost of Conflict
- ✓ Understanding the Leader's Role in Conflict, and in Conflict Management
 - Being a leader means managing conflict
 - Using Performance Management, the Disciplinary Process, and Human Resources to manage conflict
- ✓ Identifying the Root Cause of Conflict
 - Examples of organizational, team, and interpersonal conflict
 - Looking for organizational solutions, such as clear roles/responsibilities or sponsorship alignment
- ✓ Practicing Tools to Manage Conflict



Performance Management and Goal Setting

This course is designed to improve the participant's ability to use the Company's Performance Management processes and tools. Participants will learn how to set SMART goals for employees, hold them accountable, and conduct professional performance management conversations.

In addition, participants will learn when and how to use the Disciplinary Process, for both Exempt and Non-Exempt employees (i.e. Warnings, Performance Improvement Plans). Participants will learn the importance of effective and detailed documentation to reduce legal exposures.

Learning Objectives:

- Participants will increase their ability to hold employees accountable through their Performance Management and Goal Setting processes.
- Participants will practice the delivery of tough messages in a manner that both gets across the messages and respects the other individual.

Agenda (4-Hour Workshop)

- ✓ Performance Management Overview
 - Importance of Performance Management
 - Reward / Compensation
 - Coaching before Counseling
- ✓ Performance Management Process
 - Aligning Goals with Business Targets
 - SMART Goals
 - Performance Reviews – Feedback, Active Listening, Effective Questioning
 - Evaluations, Progress Results, Ratings
- ✓ Disciplinary Process
 - Overview and importance of the Disciplinary Process
 - Company Policies and Procedures
 - Exempt versus Non-Exempt
 - Coaching, Training, Disciplining

Stakeholder Analysis and Influencing Others

This course is designed to improve the participant's ability to influence others in their organization, and to include these influencing techniques into their project planning and communications. The leader will become more aware of others' objectives, so that the leader can adjust her/his approach to influencing others, so they achieve the desired organizational behaviors.

Learning Objectives:

- Participants will strengthen their understanding of stakeholder involvement in their work, and will practice the development of change management processes to increase the likelihood of their projects' successes.
- Participants will learn, and practice, influencing techniques to enhance long term commitment to changes.

Agenda (6-Hour Workshop)

- ✓ Stakeholder Analysis Activity
- ✓ Creating Change and Communication Plans
 - Learning the principle of "WIIFM" – "What's in it for me"
 - Learning the importance of structured and cascading communications
- ✓ Influencing Others
 - 3 Simple Ways to Influence Others
 - Influence is a process, not an event
 - Choosing an influencing technique requires putting yourself into their shoes, and considering factors (such as time, money, sponsorship, etc)
 - Understanding that choices regarding influencing techniques can lead to different results, in terms of Compliance v Commitment
 - Debrief on process/emotions/active listening
- ✓ Emotional Intelligence
 - Understanding how to pick up on cues, around resistance
 - Practicing on-the-fly adjustments and flexibility
- ✓ Final review and presentation of take-home exercises

Interviewing and Selection

This course is designed to improve the participant's ability to display the skill of conducting a standard, consistent, and legally compliant interview. Participants will learn how to engage with the interviewee to learn about past behavior that will predict future performance. Participants will learn how to screen resumes, write interview questions using Behavioral Interviewing techniques, and spend more time *listening* and less time *talking* during interviews.

Learning Objectives:

- Participants will increase their skill in selecting the right candidates for interviews.
- Participants will build their interviewing skills, increasing the likelihood of making effective hiring decisions.

Agenda (6-Hour Workshop)

- ✓ Understanding Policies and Legal Guidelines
- ✓ Understanding the Recruitment Process
- ✓ Preparing for an Interview
 - Defining the job
 - Defining the competencies, behaviors, and values of the position
 - Screening resumes: what to look for
 - Writing effective interview questions
- ✓ Delivering an Effective Interview
 - Putting candidate at ease
 - Asking open-ended questions
 - Listening 80%; talking 20%
 - Keep interview on track and close effectively
- ✓ Post Interview
 - Reviewing notes as a team
 - Evaluating and selecting as a team

Managing Change

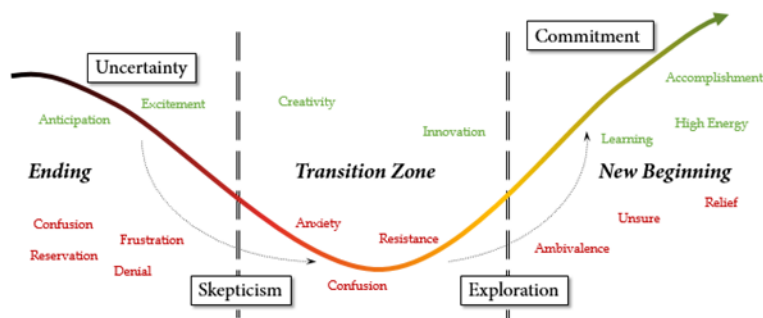
Research shows that 50-70% of how employees perceive their organization can be traced to the actions of one person: the leader. People take their behavioral and attitudinal cues from higher management . . . particularly from the person they report to. This course is designed to improve the participant's ability to manage and communicate change.

Learning Objectives:

- Participants will gain an appreciation for how people move through changes, so that these leaders can create an effective strategy to take an organization through change.
- Participants will learn, and practice, structural techniques to build plans that encourage their stakeholders' adoption of changes.

Agenda (1-Day Workshop)

- ✓ What is Change? Who are Stakeholders to Change?
 - Real business experiences involving Change
 - Stakeholder Map
- ✓ How do individuals and teams respond to change?
 - "The Change Curve" – Phases of Responses
 - Individuals reactions to Change: motivation levels, excitement v. stress
- ✓ Leadership through the "Change Curve"
 - Understanding impacts of Change on all stakeholders
 - Incorporating impacts in plans: training, communications, feedback loops
- ✓ Using the Change Management tools back on the job



Structured Problem Solving

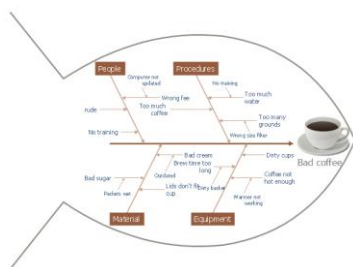
This course is designed to improve the participants' abilities to assess situations and apply a structured approach to solving problems. Teams will work with real-life business challenges, apply the approach, and present recommendations to the broader class.

Learning Objectives:

- Participants will learn collaborative techniques to identify the root causes of business issues.
- Participants will learn, and practice, structured techniques to clarify the opportunity, prioritize solutions, and create an action plan that is realistic.

Agenda (4-Hour Workshop)

- ✓ Getting Started
 - Understand the situation – scenarios and simulations
 - Identify experts and establish expectations
 - Learn techniques to assess root cause(s)
- ✓ Define the Problem
 - Dissect the problem into components and prioritize
 - Identify resources and obtain commitment to move forward
- ✓ Data Collection and Analysis
 - Focus on the key questions that get to the root cause of the problem
 - Manage data and analysis to avoid losing sight of problem
- ✓ Conclusion and Recommendations
 - Prioritize conclusions into a cohesive set of recommendations
 - Confirm level of analysis to support recommendations; build consensus
- ✓ Communicating the Solution
 - Drive to a straight forward compelling message, with supporting data
 - Present your findings succinctly to the key decision makers



Effective Upward Communication and Presentations

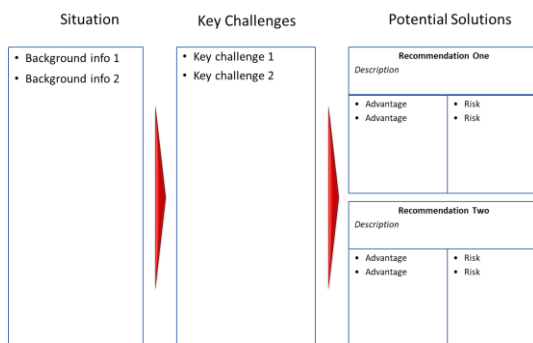
This course is designed to build the participants' abilities to communicate to higher levels of management. Through simulations, practice, and guest discussions, the participant learns how to value the time of higher-level leaders, by presenting through a structured approach (Situation, Challenge, Recommendations). Participants learn to take complex and copious amounts of data, synthesize that data, and develop an "Executive Summary".

Learning Objectives:

- Participants will gain an appreciation for the art of delivering messages to senior levels of management, or to clients.
- Participants will learn, and practice, techniques to increase the likelihood that their recommendations are heard and acted upon.

Agenda (2-4 Hour Workshop; Can Be Broken Into Parts)

- ✓ What is the key to communications at senior levels?
 - How much information is enough, too much?
 - What do senior level leaders respect in communications?
- ✓ Business Simulation
 - Learning the Simulation and Basic Financial Principles
 - Working in teams to collect data, and make decisions
 - Collaborating on presentations for senior leadership
 - Receiving feedback from senior leadership
- ✓ Back on the job



Meeting Management & Decision-Making

This course does more than only teach the best practices of running meetings, it helps leaders consider how they would like all meetings in their company to be held. Often, leaders express that upwards of 50% of their meetings are not productive. This results in many leaders not having enough time in a day to complete their work. In turn, this results in leaders neglecting important elements, including their own functional work and even their own self-care, such as sleep, exercise, and time with their families.

Perhaps one of the easiest ways to return time to individuals is to help organizations run their meetings more effectively. To get to that place, leaders must agree on the purpose of meetings, before they agree to the basics of meeting management. Then, leaders can align around the ways to hold everyone accountable to implementing core meeting management principles.

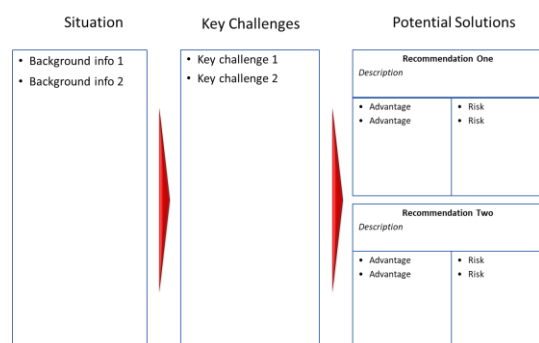
In this workshop, we tackle team meetings, 1:1s, and the dreaded “status report meeting!” Leaders leave the workshop empowered with best practices, and committed to creating organizational norms around meetings.

Learning Objectives:

- Develop the participants’ appreciation for effectively-run meetings.
- Enhance the participants’ skills in setting up, delivering, and following up on their meetings.

Agenda (4-Hour Workshop)

Upward Communication



Team Decision-Making



Thinking Strategically As a Department Leader

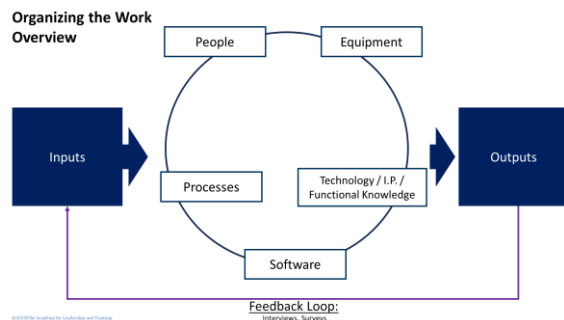
Oftentimes, we hear from CEOs that they would like their leaders to “think more strategically” and to be able to communicate their strategies to their staff. In this workshop, we take leaders through our proprietary framework for viewing their work, transforming raw inputs and requirements into finished products and/or services. Leaders spend time discussing their departments as, essentially, small businesses, with employees (staff), customers (internal or external to the Company), and the value of continuous improvement in areas of their business. Participants present their work to each other, and leave the workshop not only with a completed template to communicate their department’s work, but also with new knowledge about other departments.

Learning Objectives:

- Participants will learn the difference between tactical and strategic thinking.
- Participants will practice strategic thinking techniques using their department as a model.
- Participants will learn to present their department’s work to others, and participants will gain an appreciation for other departments.

Agenda (4-Hour Workshop)

- ✓ Your Department as a Small Business
 - What are small businesses?
 - How is your department a small business?
- ✓ Completion of Strategic Framework
 - Explaining and discussing the strategic framework
 - Completing the framework for each department
- ✓ Gallery Walk Presenting the Strategic Frameworks



Customer Service and Emotional Intelligence

Customer Service skills can be the key to keeping clients for the long-term. What's more, their jobs are emotionally taxing. This workshop assists these folks to communicate effectively to multiple types of personalities and to build their skill in managing their own emotions and interpretations of events before them. In strengthening Emotional Intelligence skills, these leaders will be positioned to strengthen their interactions with colleagues, customers, prospects, and vendors. The workshop participants learn the principles behind Emotional Intelligence, gain self-awareness in their preference for communication, and strengthen their ability to assess how they are interpreting situations, so they can gain empathy toward others.

Learning Objectives:

- Participants will learn about Emotional Intelligence (E.I.), specific techniques to enhance their own E.I., and how to apply those techniques to increase the likelihood of smooth customer interactions.
- Participants will leave the workshop having practiced specific techniques for likely instances in their business.

Agenda (1-2 Day Workshop)

- ✓ Emotional Intelligence (E.I.)
 - What is Emotional Intelligence, and how is this skill one of the keys to your career growth and to building the Company's success?
 - Scenarios where Emotional Intelligence will apply directly to your role.

Our E.I. model, known as "T.E.A.R." or:

Thoughts →

Emotions →

Actions →

Results →

When we understand how we are interpreting situations (and, by the way, where that interpretation may be wrong), we strengthen our ability to respect others. Along with that respect and empathy for others comes our own empowerment to support and "show up" the way we would like to, even in unsettling circumstances.

Sales Team Training

Is your Sales Team aligned on their messages to customers and to prospects? Does your team effectively differentiate the value of your product and service and how you excel above your competitors? Many of our clients say, "Some of them do." Our 5-part Sales Training program helps to align your salespeople, with a Messaging Framework and a way to visualize to whom they are selling. This 5-Part program can be delivered in a variety of ways (in-person v remote; over time or all in two-days).

Learning Objectives:

- Salespeople will work to crystallize their key messages for their customers, connecting the customers' needs with the key areas of differentiation that their company possesses versus its competitors.
- Salespeople will learn to sell proactively through a strategy and a plan that puts strategy into action. The sales strategy will include new customer acquisition as well as new sales to existing customers.

Agenda (5-Part, 2-hours per part, Sales Training Series)

- ✓ 1) Messaging
 - What is the difference between Sales and Marketing, and how does Messaging fit into both areas?
 - Points of Differentiation (PODs)- What makes you stand out?
- ✓ 2) Targeting
 - Build your "Marketing Personas" and team shares
 - Create your Unique Value Proposition, written with each Persona in mind
- ✓ 3) Unique Value Propositions (UVPs) and Handling Objections
 - Team alignment on UVPs
 - Handling the most common customer/prospect objections
- ✓ 4) Proactive Selling
 - Strategies for nurturing relationships, including storytelling, customer segmentation and frequency of communication to different customers
 - Creating a tactical sales plan for existing customers
- ✓ 5) Building Pipelines: Connecting with New Customers
 - New customer segmentation and sharing best practices

Curriculum-Guided Coaching

If you have leaders who could level-up with the right coaching, and their manager would like to guide that development path, then 1:1 Curriculum-Guided Coaching could be a wonderful solution. Through this process, our senior facilitator will meet with the leader's manager, and the leader, to select the leadership behaviors on which they will focus. Leaders will receive a six-month bespoke coaching model that both allows for flexibility and structure. This leader will experience accelerated growth to bring them to their next level.

Learning Objectives:

- Participants will have the unique experience of a 1:1 coach to build specific leadership skills that are selected by their manager and themselves.
- Participants will gain a deep understand of leadership techniques and have the opportunity to talk with a coach about their implementation of these techniques.

Process (6 months of 1:1 coaching around specific leadership curriculum topics; coaching meetings to take place every other week)

- ✓ 1) Kick-Off
 - The leader's manager (and possibly the leader) meets with the TAFLAT Sr. Facilitator to discuss the program and set expectations.
 - Review of TAFLAT Curriculum – All curriculum modules and the time needed to complete each module.
- ✓ 2) Selection
 - The leader's manager and the leader discuss the leadership behaviors they would like the leader to enhance.
 - The two carefully select 3-6 modules for the guided-curriculum coaching.
- ✓ 3) Facilitation
 - The TAFLAT Sr. Facilitator and the leader set up six months of one-hour meetings, every-other-week (or 12 total Zoom meetings).
 - Each meeting includes an explanation of the leadership material, with participant activities, and each session concludes with action step commitments by the leader.
- ✓ 4) Debrief
 - Once all 12 meetings are delivered, the leader, the leader's manager, and TAFLAT meet to debrief the value achieved and further development.