



Dedicated to Improving Your Bottom Line
LEE JAMES & ASSOCIATES

Presents

PROJECT MANAGEMENT

“Wisely Obtaining & Managing Projects”

Approach:

- **Recommended 2-day program**
- **Will customize and personalize sessions to fit specifically with your procedures**

Who should attend:

- **Engineers and Architects**
- **New Project Managers**
- **Experienced Project Managers**
- **Future Project Managers**
- **Anyone who wants to improve their Project Management skills.**

BENEFITS

Some of the most technically proficient professionals are uncomfortable in managing the business and financial aspects of projects. Experience reveals that many technical people have difficulty discussing dollars, budgets, pricing, changes, and other associated issues. Those who become comfortable addressing these issues are the most successful. They positively differentiate themselves and their company. Better pricing, budgets and schedules are obtained. When changes do occur, more favorable adjustments result. Whenever financial issues of deposits, retainers, pricing, billing, collecting, etc. occur, the confident technical professional is better prepared to meet the needs of the project, the associated people and profit. This program provides participants the tools to achieve success.

Numerous real-life experiences and case studies are used to teach and bring to light the principles taught. Sessions are highly interactive with active learning occurring throughout.

Sessions cover such topics as:

- Meet your needs and your customers' needs
- Assess compatibility of projects and customers with your firm's business strategy
- Become comfortable discussing \$\$
- Arm yourself with methods to sell your pricing
- Increase company profit and cash flow
- Protect your firm with contracts and insurance
- Easily complete billing and collecting
- Understand project financial reporting
- Obtain acceptance of changes
- Successfully manage small & large projects
- Meet your needs and your client's needs
- Learn by doing – i.e. Case Studies and Exercises

OUTLINE

Sessions are developed to meet the needs of employees, clients and profitability.

Communications – Studies, facts and findings, improving, perception gaps, ways to differentiate, *Exercises*

Go/No-Go Decisions – Where to obtain data, rewards and consequences, tools for better decisions, aligning with business strategy, *Case Studies*

Pricing – Alternative methods, answering objections, negotiating, differentiating, *Case Study*

Contracting & Insurance – Setting stage for success, scope of work, deposits, retainers, avoiding “pay when paid” and retainage, *Case Study*

Kick-off Meetings – Key to successful projects and understanding client. *What, When, Where, Who, Why & How; Case Study*

Financial Systems – Successfully using your system, revenue and cost recognition triggers, reading and understanding financial reports, role of computer systems, software alternatives

Billing and Collecting – Importance of cash, ways to do painlessly, methods to maximize cash flow, issues affecting payment, *Case Study*

Doing Contract Changes – Proactively managing, alleviating negative reactions, documenting, *Case Study*

Differences in Small and Large Project – Meeting differing needs, using system to manage, assessing risks, managing properly, *Case Study*

Winning Outcome – Empowered employees, delighted customers and increased profit.

PARTICIPANT COMMENTS

The course material and leader consistently receive excellent ratings. Representative comments received from participants are:

“The course ties together the entire project process from marketing through performance in a very concise manner.”

“Covered real life conditions of consulting services (and clearly identifies how to address some real issues in our business).”

“Extremely valid & useful information that can be readily applied with the assurance that the implementation of ideas will result in positive change.”

“Raising awareness of engineering as a business. To be successful, we must not only strive to be good technically, but have business savvy as well.”

“Directly addressed central issues, problems of consulting as a business, leading to more profitable and more enjoyable work & career.”

“This one of the best training courses I have attended in all industry (approx. 20 years).”

“Mr. James managed to keep the discussions lively and did a great job presenting material that could have otherwise been dry. I have been a PM for approx. 11 years and I came away from the course with several (a lot) of new ideas/things to try.”

“Most of us are good technically. This course helped tremendously in making us good from a business point of view. Lee James clearly knows his subject. Unlike many trainers, he has “walked the walk” so that he can convincingly “talk the talk.” A particular strength was his ability to bring questions and comments from the group to illustrate the big points without going over time.”

“Lee is a very dynamic presenter. It was refreshing to see that he has considerable experience in our field, rather than coming from an entirely different industry.”

INSTRUCTOR

Lee James is a CPA and CMC who has worked with engineers and architects for the last 15+ years. Training and teaching have been a part of Lee's career for the past 25+ years. Lee develops and teaches training courses throughout the U.S. He is an enthusiastic and energetic trainer who keeps your attention. Numerous case studies and exercises are used to embed the principles taught.

Lee is active in several professional societies and is continually promoting good business practices through authoring articles and completing training sessions. He was Vice President of Finance for an international engineering consulting firm and worked daily with projects, project managers and clients in developing pricing strategies, managing billing and collections, addressing change issues and negotiating win-win solutions. Previously, Lee worked with Ernst & Young as a project manager and trainer and as the Chief Financial Officer for a computer software engineering firm.

Lee now does similar work with his firm. He constantly experiences the challenges of fulfilling project technical aspects; as well as financial and business needs. Project financial systems, computer systems, strategic planning and ownership transfer projects are continually in process. Lee has successfully put into practice all the principles he teaches in this program.

On-site training and flexibility

The program is designed to be flexible with regard to format, timeframe and location. The program is divided into modules that are independent of one another and deal with specific problems and their solutions. The curriculum is developed so that organizations wanting shorter sessions, dealing with specific problems, are accommodated. While we encourage the complete three-day program, one and two day agendas are available with specific modules of your choice. As an added benefit, we can customize each module to include your company's specific documentation, systems design as well as policies and procedures.

Due to the interactive nature of these sessions, class sizes of less than 30 people are recommended.

A participant manual, handouts and reference materials are provided for use throughout the sessions and after completion.

For more information or to schedule, please visit our websites or call:

Lee James & Associates
www.leejames.com

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