

# UNDERSTANDING FINANCIAL PERFORMANCE

## Approach:

Recommended 1-day program

Will customize and personalize sessions to fit specifically with your procedures

## Who should attend?

Engineers & Architects

Future Project Managers

New Project Managers

Experienced Project Managers

Anyone who wants to improve their Project Management skills

*Dedicated to Improving Your Bottom Line*  
**LEE JAMES & ASSOCIATES**



## BENEFITS

This program is developed to take some of the mystery & frustration out of understanding financial performance. The purpose, need and differences in internal & external financial reporting is explained. The who, what, when, where, why & how are addressed. You will obtain additional comfort in reading & understanding financial statements, reporting & analysis'. This program will arm you with the knowledge to use & understand financial performance as well as making good business decisions. You will be better informed & more prepared to understand & discuss financial results within your business & with your customers, suppliers & others.

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.

## SESSION COVERS TOPICS SUCH AS:

- Become comfortable discussing financial reporting
- Take the mystery out of financial reporting
- Understand internal & external reporting
- Learn how to use ratios to measure performance
- Understand project financial reporting
- Compare actual vs. budgeted results
- Develop ways to report past & future results
- Improve profit through better financial analysis & understanding
- Use financial statements to analyze business strengths & weaknesses
- Learn by doing – i.e. case studies & exercises

## OUTLINE

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

**General** – Accounting objectives, role of CPA, internal vs. external reporting, customers & profitability

**Internal Reporting** – Planning, ratios, effective ways to monitor performance

**External Reporting** – Reasons, needs, statements used, footnotes, ratios, how to read

**Case Studies/Exercises** – internal analysis' & findings, analyzing a public company, ratio analysis, Dun & Bradstreet reporting, need for profitability

**Winning Outcome** – Empowered employees, delighted customers & increased profit

## PARTICIPANT COMMENTS

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

*"Very well organized, very effective presentation."*

*Cash histories & exercises were very beneficial."*

*"Will allow me to manage more effectively."*

*"Helped me understand what financial people are providing."*

*"Getting practical guidelines for evaluations of performance."*

*"Opened my eyes to the various ratios and how to use them as a tool."*

*"Exposure to various ratios for internal efficiency review."*

*"Brought out very critical items to keep a firm profitable."*

*"Great perspective on on business issues, financial management."*

*"Understanding interrelationships of business finances.."*

*Greatly improved understanding of financial statements, not only year end, but on weekly/monthly tracking basis."*

## INSTRUCTOR

Lee James is a CPA, CMC, CBI who has worked with engineers, architects and contractors for the last 25 years. Training and teaching have been a part of Lee's career for the past 30 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 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.

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For more information, please visit our website, email or call us:

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