

MARCH 15-18, 2017 • ORLANDO FL

THE BUSINESS OF DESIGN CONSULTING

A management intensive program for developing A/E firm leaders

***Advance the leadership potential
of your best and brightest!***



Earn 22.5 PDHs!

MASTER THE CHALLENGES OF TODAY'S A/E BUSINESS

Real-World Skills ... Strategic Insights ... Best Practices for Success

Managing your A/E business for success requires technical know-how coupled with a broad awareness of today's best multi-disciplinary business practices.

Firm managers — especially up-and-comers — must know the rules of finance and how they work in the real world, and the ins and outs of managing people, risk and resources, including:

- Navigating the intricacies of human relations and associated legal elements
- Creating and managing client relationships and client expectations
- Managing risk and drafting/adapting contracts
- Knowing the fundamentals of business development
- Strengthening financial and accounting skills with an eye toward connecting firm financial performance to building firm value

Contemporary Best Practices and Critical Operational Management Methods

The multi-day agenda highlights strategies for a wide array of critical business topics that will keep your business thriving despite a churning business environment.

Attendees will learn specific skills and techniques to help them manage change and build success in performance management, strategic planning and growth, finance, leadership, ownership transition, contracts and risk management, marketing, and more!

Instructing from the Heart of Experience



Rod Hoffman, PE, is co-founder and CEO of S&H Consulting, an A/E management consulting firm. Hoffman has 25+ years of industry experience and previously served as senior vice president and director of strategic planning and acquisition with global A/E firm HDR. He serves on the faculty of ACEC's prestigious Senior Executives Institute and remains active in the industry through ACEC.

Brett Stewart is the Risk Manager for XL Catlin Design Professional. He is responsible for developing risk management and education materials for XL Catlin's architect and engineer insureds with the goals of minimizing the frequency and severity of loss exposures, while focusing on increasing

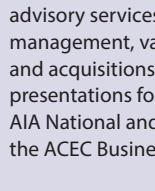


best practices. Brett interfaces directly with brokers and other valued business partners, the public and various trade organizations in an effort to promote issues that are relevant to the design community. Prior to his role as Risk Manager, he was a Senior Claims Examiner handling design professional claims for almost seven years. He is a licensed California attorney and was a litigator at two San Francisco law firms for approximately eight years. His practice

focused on construction and real estate litigation, and he represented a variety of clients including owners, developers, contractors and design professionals. Brett started his professional career in law school handling general liability claims for contractors at Argonaut Insurance.

Brett is a graduate of the University of California at Santa Barbara and the University of San Francisco School of Law. He lives and works in Walnut Creek, California.

David S. Cohen, Esq., ASA, Managing Director, Matheson Financial Advisors, Inc., has over 15 years of experience in consulting design firm clients on ownership transition, business valuation, financial management, and mergers and acquisitions. David has completed appraisal assignments for purposes of mergers and acquisitions, internal ownership transition and succession planning, Employee Stock Ownership Plans (ESOPs), and various litigation support engagements. He has assisted clients with all facets of ownership transition planning and advised clients through the mergers and acquisitions process. As an expert in valuation and financial



advisory services, David conducts seminars on the topics of financial management, valuation, ownership transition planning, and mergers and acquisitions for the design industry. He leads in-house educational presentations for firms nationwide and speaks regularly at ACEC and AIA National and State conferences and seminars. He is an instructor for the ACEC Business of Design Consulting program and the ACEC Illinois, Massachusetts, North Dakota, and Washington emerging leaders programs.



David Stone, president, Stone & Company, is a 35-year veteran in marketing and sales for the design and construction industry. As owner of his own architecture and management consulting companies, author, speaker and trainer, he has advised hundreds of design and construction firms worldwide.

"Year after year, attendees attest The Business of Design Consulting Program consistently meets objectives and fulfills expectations."

COURSE HIGHLIGHTS

DAY ONE: WEDNESDAY MARCH 15

12:00 Noon - 1:00 pm

Registration

1:00-5:00 pm

Rod Hoffman, S&H Consulting

LEADERSHIP

- The leadership path
- Personal vision

STRATEGY, PLANNING AND GROWTH HORIZONS

- Strategic planning
- Trends and opportunities
- Discipline of market leaders
- Growth horizons

DAY TWO: THURSDAY MARCH 16

7:45 - 8:30 am breakfast

8:30 am - 12 Noon

Rod Hoffman, S&H Consulting

EXECUTION AND PERFORMANCE

- Change and transition
- The change game

PERFORMANCE MANAGEMENT AND GENERATIONS

- Elements of performance success
- Generations in the workplace
- Challenges and best practices

12:00 Noon - 1:00 pm lunch

1:00-5:00 pm

Brett Stewart, XL Catlin Design Professional

CONTRACTS AND RISK MANAGEMENT

- How good is your risk management crystal ball?
- The legal system—friend or foe?
- Importance of pre-project planning
- Key risk factors that determine project success or failure
- Contracts do's and don'ts
- The quality management process
- Communication and documentation — a two-edged sword
- The construction contract administration process

DAY THREE: FRIDAY MARCH 17

7:45 - 8:30 am breakfast

8:30-12:00 Noon

Colvin Matheson, Matheson Financial Advisors

FINANCE

- Fine-tuning financial management in uncertain times
- Driving value in a volatile market
- Long-term financial and valuation results: setting the stage
- Accounting principles and practical financial tools

12:00 Noon - 1:00 pm lunch

1:00 - 5:00 pm

David Cohen, Matheson Financial Advisors

BUSINESS MANAGEMENT AND OWNERSHIP TRANSITION

- Financial exit strategies when market conditions are at all-time lows
- Retirement planning: internal ownership transition issues, internal buy-outs, stock plans, ESOPs
- Gearing stock expansion programs to the new market realities
- The “ins and outs” of mergers and acquisitions in the recovery decade

DAY FOUR: SATURDAY MARCH 18

7:45-8:30 breakfast

8:30 am - 12:00 Noon

David Stone, Stone and Company

MARKETING AND BUSINESS DEVELOPMENT

- A comprehensive view of your entire “get-work” effort
- Using the five-stage system for a balanced, multi-layered marketing program
- Starting with strategy—finding your differentiators
- Broadcasting your message through brand-building
- Winning with one-on-one selling
- Building a high-touch, high-return customer service program
- The vital role of business development

REGISTER NOW! Early Bird Rates until 2/3/17

“Business of Design Consulting speakers always earn high marks on preparation and subject knowledge, as well as clear and engaging presentation styles.”

Earn 22.5 PDHs!

REGISTRATION

ATTENDEES	Advance	After February 3, 2017
ACEC members	____@\$1,675 = \$ ____	____@\$1,900 = \$ ____
ACEC non-members	____@\$1,900 = \$ ____	____@\$2,100 = \$ ____

ATTENDEE INFORMATION

(For multiple attendees, please attach additional copies of this form.)

Name _____

Name for Badge _____

Title _____

Discipline _____

Role in Firm _____

Firm _____

Address _____

City _____ State _____ Zip _____

Phone _____ Fax _____

E-mail _____

PAYMENT INFORMATION

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Card # _____ Expiration Date _____

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Make check payable to ACEC/Education Programs and send with form/s to:

American Council of Engineering Companies
ATTN: Business Resources and Education
1015 15th St, NW, 8th Floor
Washington, DC 20005-2605
Or Fax to 202-789-7220 (secure)

HOTEL INFORMATION

The designated event hotel is the Orlando World Center Marriott, 8701 World Center Drive, Orlando Florida 32821. Book your room for **ACEC Business of Design Consulting Seminar**. Special rate of \$199 USD/night (+ tax) available 03/14/17 to 03/18/17. Make reservations by calling **888-789-3090** (reference ACEC Business 2017) or by going to <http://bit.do/acec-bdc2017hotel>. The cut-off date for hotel reservations is February 21, 2017.

REFUNDS, CREDITS, SUBSTITUTIONS AND CANCELLATIONS

For cancellations received by ACEC at least 30 days before the program date, ACEC will issue a full refund of registration fees, less \$100 administration fee. For cancellations received by ACEC between 29 and 15 days before the program date, ACEC will issue credits toward future ACEC education seminars. Credits are valid for six months toward any ACEC education seminar. For cancellations received by ACEC 15 days or less before a program date, ACEC will issue no refunds or credits. In addition, ACEC will issue no refunds or credits for "no-shows." Substitute attendee registrations may be made at any time.

Additional information is available at www.acec.org, by email to Education@acec.org, or by phone 202-347-7474, ext. 349.

GET FULL PROGRAM & REGISTRATION DETAILS:

<http://programs.acec.org/BDCSpring2017>