



AMERICAN COUNCIL OF ENGINEERING COMPANIES

Business of Design Consulting

February 27-March 1, 2023

Daily Schedule of Events

Hilton Scottsdale Resort & Villas
6333 N Scottsdale Rd, Scottsdale, AZ 85250

February 27, 2023

7:30am - 8:00am

Breakfast and Registration

Breezeway

8:00am - 12:00pm

Managing to Succeed in a Challenging Business Environment

Kiva 1

Steve Walker, srwalker & associates

- The Leadership path
- Personal Vision
- Strategic planning
- Trends and opportunities
- The Discipline of Market Leaders
- Growth Horizons

12:00pm – 1:00pm

Lunch and Networking with Attendees

Kiva Patio

1:00pm - 5:00pm

Pathway to Leadership

Kiva 1

Kelly McArter, HR Advisors Group, LLC

- Transitioning from Project Management to Leadership
- Building Relationships
- Creating High Performance and Diverse Teams
- Management Best Practices in the E/A Industry



February 28, 2023

7:30am - 8:00am

Continental Breakfast

Breezeway

8:00am - 12:00pm

Finance

Kiva 1

Matt Fultz, Matheson Financial Advisors

- 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

12:00pm - 1:00pm

Lunch and Networking with Attendees

Kiva Patio

1:00pm - 5:00pm

Business Management & Ownership Transition

Kiva 1

Matt Fultz, Matheson Financial Advisors

- Financial exit strategies
- 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



March 1, 2023

7:30am - 8:00am

Continental Breakfast

Breezeway

8:00am - 12:00pm

Contracts and Risk Management

Kiva 1

Michaela Kendall, Underwriting Manager and Cheryl Shaw, Senior Claims Specialist, AXA XL, a division of AXA

- 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

12:00pm - 1:00pm

Lunch and Networking with attendees

Breezeway/Kiva Patio

1:00pm - 5:00pm

Maximizing Your Business Development & Marketing ROI

Kiva 1

Richard Friedman, Friedman & Partners

- 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