

WEDNESDAY, APRIL 3 – SATURDAY, APRIL 6, 2019 • PHOENIX AZ

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.



Colvin Matheson is the founder and Managing Director of Matheson Financial Advisors, Inc., a boutique corporate financial advisory firm focused on professional services firms, the A/E/C and environmental consulting industry, and government contractors/federal program management firms. He is also a founder and a managing member of A/E Advisors, LLC, which is a network of A/E industry consultants covering a variety of management consulting practice areas. Colvin developed ZweigWhite's seminars on the topics of firm valuation, ownership transition, and mergers and acquisitions that were presented to hundreds of industry executives, and he regularly gives presentations on these subjects to A/E industry conferences. Colvin earned the prestigious Chartered Financial Analyst (CFA) designation in 1996, received an MBA in Finance and International Business from George Washington University, and a BA from Tulane University.



David Stone, president, blüStone Marketing, 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 APRIL 3

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 APRIL 4

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

- Legal Liability for Design Professionals
- Pre-Project Planning and Risk Analysis
- Contracting Do's and Don'ts
- Communication and Documentation
- Contract Administration

DAY THREE: FRIDAY APRIL 5

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

Colvin Matheson, 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 APRIL 6

7:45-8:30 breakfast

8:30 am - 12:00 Noon

David Stone, blüStone Marketing

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 2/8/19

"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 8, 2019 |
|------------------|-------------------------|-------------------------|
| ACEC members | ____@ \$1,895 = \$ ____ | ____@ \$2,095 = \$ ____ |
| ACEC non-members | ____@ \$2,095 = \$ ____ | ____@ \$2,295 = \$ ____ |

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

☐ AMEX® ☐ Visa® ☐ MasterCard® ☐ Discover®

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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 Kimpton Palomar Phoenix, 2 E. Jefferson St., Phoenix, AZ 85004. Book your room for **ACEC Business of Design Consulting Seminar**. Make reservations by calling **1-800-KIMPTON** (mention group code JB9). The cut-off date for hotel reservations is February 6, 2018 (or until the block sells out).

REFUNDS, CREDITS, SUBSTITUTIONS AND CANCELLATIONS

For cancellations received at least 15 days prior to program date, ACEC will issue a full refund. For cancellations received between 14 days and 3 days prior to program date, ACEC will issue credits toward any ACEC online class, live or on-demand. Credits are valid for 6 months from issue date. For cancellations received 2 days or less before a program date, no refunds or credits will be issued. Refunds or credits will not be issued for "no-shows." Registrants may choose another online class or substitute attendee/s without penalty at any time. Contact education@acec.org for further information.

Additional information is available at www.acec.org, by email to Education@acec.org, or by calling Maureen Brown at 202-682-4349.

GET FULL PROGRAM & REGISTRATION DETAILS:

<http://programs.acec.org/bdc2019>