Day One: May 21, 2019

7:30 am – 8:15 am  
Registration, Continental Breakfast in room

8:15 am – 9:00 am  
Goals and Expectations

- Safety and logistics
- Introduction and overview of course
- Participant Goals and Expectations
- Participant Introductions

9:00 am – 12:30 pm  
Basic Financial Management

- Understanding an Engineering Business Income Statement and Balance Sheet
- Cash Flow Statement
- Thoughts on Valuation
- Exercise on what you have learned
- Practical ideas to improve items such as:
  - Expense Management/Indirect costs
  - Cash Flow
  - Multiplier
  - Utilization
- The Power of 1%

12:30 pm – 1:30 pm  
Lunch and Networking with Attendees

1:30 pm – 4:00 pm  
Contracts and Risk Management

- The basics of contracts
- Scope of services
- General contract and negotiation issues
- Case studies
- Key ingredients to a successful contract

3:00 pm – 3:15 pm  
Break

- Risk Recognition Simplified
- Mitigation Methods and Monitoring
4:00 pm – 5:30 pm  Consequences and Opportunities with Financials
  • Team Analysis (participants broken into small groups)
  • Team Presentation of a Financial Roadmap

Day Two:  May 22, 2019

7:30 am – 8:15 am  Continental Breakfast in room
8:15 am – 10:30 am  Sales and Marketing

  • Sales and marketing is a team sport!
  • Client concepts
  • “4 Box” and how to market to your strengths
  • What should be measured, and what is a false indicator
  • Using Focus and Energy to create Results
  • Setting SMART Goals

10:30 am – 10:45 am  Break
10:45 am – 12:15 pm  Performance Reviews and Employee Retention

  • How to Have a Candid Conversation
  • Performance Review Best Practices
  • Turnover statistics, and what is “good turnover”
  • Team Retention Techniques

12:15 pm – 1:15 pm  Lunch and Networking
1:15 pm – 2:45 pm  Project Review and Alternative Delivery

  • Best Practices for Reviewing Projects
  • Earned Value and Early Warning Systems
  • Do’s and Don’ts of Alternative Delivery
  • When things go wrong
  • Client management

2:45 pm-3:00 pm  Break
3:00 pm – 3:45 pm  The what, when and how of management communications!

3:45-5:00 pm  Putting it all Together

  • Case Study on Improving an Actual Engineering Operations Financial Performance
  • Team Activity and Presentation

5:00 pm – 5:15 pm  Concluding session