

Training, Tools & Recommended Readings

Professional Training - "Working within the A/E/P/C Industry"

Career Development and Industry Relations

Exploring the Public and Private Career

Employer Perspectives

- *A/E/P Consulting*
- *Environmental Permitting and Natural Resources*
- *GIS & CADD*
- *General Contracting*
- *Legal Practice*
- *Lending Institutions*
- *Emergency Responders & Disaster Relief*
- *Churches*

Business Development

Proposal Preparation

- *Knowing Your Competition*
- *How Hungry Are You?*
- *Understanding the Project*
- *Team Qualifications*
- *Go/No Go Decision*
- *Project Approach*
- *Developing the Scope, Schedule, Budget and Deliverables*
- *Submission Checklist*

Project Management

Defining the Project

- *Problem Solving Process*
- *Feasibility Studies*
- *Pilot Project*

Developing Scopes, Schedules, Budgets and Deliverables

- *Job Descriptions*
- *Labor Rates*
- *Profit Margin*
- *Quality Control*

Executing the Project

- *Project Setup*

- *PM Duties and Responsibilities*
 - ✓ Plan the Project
 - ✓ Develop a detailed description of the work by breaking down the overall work into individual tasks.
 - ✓ Analyze the sequence of the tasks.
 - ✓ Estimate the tasks to determine the required staffing skills, effort and equipment.
 - ✓ Add up the costs and schedule estimates of the individual tasks to determine the total cost and duration of the entire project.
 - ✓ Negotiate the Contract
 - ✓ Support the client manager in negotiations with the client over scope, schedule, budget and deliverable elements.
 - ✓ Organize the Project
 - ✓ Evaluate the skills and select the project team members to work on the project. Team members can come from more than one office and consulting firm.

- ✓ Direct the Project
 - ✓ Conduct daily "5 minute walk-around" communicating, coordinating and tracking the technical staff and outside consultants.
 - ✓ Conduct regular sit-down team meetings. If other offices and/or contractors are involved establish conference call procedures.
 - ✓ Control the Project
 - ✓ Monitor the progress of the project against the Plan.
 - ✓ Communicate with the project team and the Client.
 - ✓ Maintain the balance between cost, schedule and quality.
 - ✓ Take corrective action to keep the project on track.
 - ✓ Manage the Project Finances
 - ✓ Account for all job costs.
 - ✓ Develop accurate invoices on a pre-approved client format.
 - ✓ Ensure prompt payment of outstanding invoices.
 - ✓ Help to Sell the Firm
 - ✓ The best way to get more work is to do good work within the approved parameters of the scope, schedule and budget.
- *Project Kickoff Meeting*
 - ✓ Schedule meeting with entire project team. Include Directors in notification.
 - ✓ Confirm PM and Task Leader assignments. Establish communication protocol and conflict resolution process.
 - ✓ Provide background of project and history of your firm's involvement with client.
 - ✓ Distribute job number, task and activity codes, scope, schedule, budget and list of deliverables.
 - ✓ Allocate hours to each team member.
 - ✓ Establish CADD standards and develop prototype drawing file.
 - ✓ Establish design review and QA/QC process.
 - ✓ Establish project filing and documentation procedures.
 - ✓ Review policy on transfer of electronic documents.
 - ✓ Schedule next regular project team meeting preferably before each major milestone.
- *Project Close-Out Meeting*
 - ✓ Review entire scope, schedule and budget. Was there scope creep? Did the hours assigned accurately reflect the project budget? Did the project team understand and stay within their allocated hours? Discuss any variances and have each task leader discuss how and when they happened.
 - ✓ Review make-up of project team during the life cycle of the project. Was there one consistent team? Was the PM successful in directing the project team? Were their regular team meetings?
 - ✓ Was there interoffice work sharing? Were scales of economies achieved?
 - ✓ Did deliverables meet agency design standards—the first time? Did they also represent your firm's branding standards?
 - ✓ Were changes in jurisdictional design standards memorialized in one central filing location?
 - ✓ Did the design team work from the same CADD prototype drawing file?
 - ✓ Was the QA/QC process effective?
 - ✓ What were the final contract fees for the job?
 - ✓ Are there any account receivables?
 - ✓ Were there any write-offs?
 - ✓ What was the percent and dollar profit?
 - ✓ Was Accounting notified to close job?
 - ✓ Have the job files been purged and archived?
 - ✓ Would you want to work for the client again?
 - ✓ Have you scheduled a "thank you" lunch with the client and the project team?
 - ✓ What were some of the lessons learned from this job?
- *Quality Control*
 - *Project Tracking & Performance*

- *Project Communication*
 - ✓ *Progress Reports*
 - ✓ *On the Web*
 - ✓ *Working With Other Offices Home and Abroad*
 - ✓ *Team Kudos*
- *Project Production Tools*
 - ✓ *Online Mapping*
 - ✓ *Jurisdictional Development Codes*
- *Project Administration*
 - ✓ *WBS*
 - ✓ *Filing and Document Standards*
 - ✓ *Invoice Format*
 - ✓ *Collections*
 - ✓ *Time Charging Guidelines*
 - ✓ *Manpower Projections*

Strategic Planning

- *Vision*
- *Core Services*
- *Are you Kicking A Dead Horse?*
- *Key Staff*
- *Market Sectors*
- *Target Clients*
- *Financial Goal*
- *Action Plan and Budget*

Business Operations

- *Improvement Goals*
- *Short Term Cost Savings Measures*

Business Ethics

- *Reflecting Your Faith in the Workplace*

"There is but one rule of conduct...to do the right thing. The cost may be dear; in money; in friends; in influence; in labor; in a prolonged and painful sacrifice. But the cost not to do right is far more dear; you pay for it with your integrity; in honor; in truth; in character. You forfeit your soul's content; for a timely gain, you barter your soul's infinity." – Various Authors

- *Codes of Conduct*
- *Traveling & Being Away From Home*

“Giving Back”

- *Global Professionals in Action*
- *Is Your Church Growing?*

Recommended Readings

- *The Long Boom – Peter Schwartz, Peter Leyden, Joel Hyatt*
- *The Art of the Long View – Peter Schwartz*
- *Good to Great – Jim Collins*
- *Keeping Clients Satisfied – Robert W. Bly*
- *What You Need to Know About Doughnuts – Randy Tuminello*
- *The Portable MBA in Project Management – Eric Verzuh*
- *The Five Dysfunctions of a Team – Patrick Lencioni*
- *Confronting Reality – Larry Bossidy & Ram Charan*
- *Getting to Yes – Roger Fisher & William Ury*
- *Patton on Leadership – Alan Axelrod*
- *Leadership is an Art – Max DePree*
- *The 21 Indispensable Qualities of a Leader – John C. Maxwell*

- *Beyond Integrity* – Scott B. Rae & Kenman L. Wong
- *The World is Flat* – Thomas L. Friedman
- *The Art of the Start* – Guy Kawasaki