PROJECT FINANCIAL MANAGEMENT

Approach:

Recommended 1- 2-day program

Will customize and personalize sessions to fit specifically with your procedures

Who should attend?

- Engineers & Architects
- Future Project Managers
- New Project Managers
- Experienced Project Managers
- Anyone who wants to improve their Project Management skills

Dedicated to Improving Your Bottom Line

LEE JAMES & ASSOCIATES

BENEFITS

Develops a process, mindset and comfort level with project financial management that enables participants to better meet the needs of clients. Addresses needs of project people, clients and company profitability. Begins at the very start of the project and continues through to successful completion. Concentrates on the what, when, where, who, why and how of performing on time and on budget. This training program will arm participants with skills to assess and win work, improve pricing, communicate with client and peers, positively start projects, track and report project progress, timely bill and collect, complete changes while building relationships with clients and successfully manage all size projects.

Numerous real-life experiences and case studies are used to teach and bring to light the principles taught. Sessions are highly interactive with active learning occurring throughout.

SESSION COVERS TOPICS SUCH AS:

- Meet your needs and your customers' needs
- Assess compatibility of projects and customers with your firm's business strategy
- Become comfortable discussing $s
- Increase company profit and cash flow
- Successfully set-up projects
- Easily complete billing and collecting
- Understand project financial reporting
- Obtain acceptance of changes
- Successfully track and report project progress
- Meet your needs and your client's needs
- Learn by doing – i.e., Case Studies and Exercises

OUTLINE

Sessions are developed to meet the needs of employees, clients & profitability.

Communications – Studies, facts and findings, improving, perception gaps, ways to differentiate, Exercises

Ten Commandments – Ten principles to successful Project Financial Management

Properly Utilizing Project Financial Management – Outline of project stages and example project issues

Project Set-up – The importance of properly setting up subcontract, purchase orders and tracking systems for project cost

Kick-off Meetings – Key to successful projects and understanding the client. What, When, Where, Who, Why & How; Case Study

Billing & Collecting – Importance of cash, ways to do painlessly, methods to maximize cash flow, issues affecting payment, Case Study

Tracking Project Progress – Using systems and methods in place to track and report project status

Contract Changes – Proactively managing, alleviating negative reactions, documenting, Case Study (not part of 1-day program – can be incorporated into a 2-day extended program)

Winning Outcome – Empowered employees, delighted customers and increased profit

PARTICIPANT COMMENTS

The course material and leader consistently receive excellent ratings. Representative comments received from participants are:

"The course ties together the entire project process from marketing through performance in a very concise manner."

"Covered real life conditions of consulting services (and clearly identifies how to address some real issues in our business)."

"Raising awareness of engineering as a business. To be successful, we must not only strive to be good technically, but have business savvy as well."

"Directly addressed central issues, problems of consulting as a business, leading to more profitable and more enjoyable work & career."

"This one of the best training courses I have attended in all industry (approx. 20 years)."

"Mr. James managed to keep the discussions lively and did a great job presenting material that could have otherwise been dry. I have been a PM for approx. 11 years and I came away from the course with several (a lot) of new ideas/things to try."

"Most of us are good technically. This course helped tremendously in making us good from a business point of view. Lee James clearly knows his subject. Unlike many trainers, he has "walked the walk" so that he can convincingly "talk the talk."

INSTRUCTOR

Lee has worked with engineers, architects and contractors for the last 30 years. Training and teaching have been a part of Lee's career for the past 35 years. Lee develops and teaches training courses throughout the U.S. He is an enthusiastic and energetic trainer who keeps your attention. Numerous case studies and exercises are used to embed the principles taught.

Lee is active in several professional societies and is continually promoting good business practices through authoring articles and completing training sessions. He was Vice President for an international engineering consulting firm and worked daily with projects, project managers and clients in developing pricing strategies, managing billing and collections, addressing change issues and negotiating win-win solutions. Previously, Lee worked with Ernst & Young as a project manager and trainer and as the Chief Financial Officer for a computer software engineering firm.

Lee now does similar work with his firm. He constantly experiences the challenges of fulfilling project technical aspects; as well as financial and business needs. Project financial systems, computer systems, strategic planning and ownership transfer projects are continually in process. Lee has successfully put into practice all the principles he teaches in this program.

ON-SITE TRAINING AND FLEXIBILITY

The program is designed to be flexible with regard to format, timeframe and location. The program is divided into modules that are independent of one another and deal with specific problems and their solutions. The curriculum is developed so that organizations wanting shorter sessions, dealing with specific problems, are accommodated. While we encourage the complete three-day program, one- and two-day agendas are available with specific modules of your choice. As an added benefit, we can customize each module to include your company's specific documentation, systems design as well as policies and procedures.

Due to the interactive nature of these sessions, class sizes of less than 30 people are best. Participant manual, handouts and reference materials are provided for use throughout the sessions.

For more information, please visit our website, email or call us:
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