



PROJECT FINANCIAL MANAGEMENT

Who should attend?

- 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 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 client needs
- Become comfortable discussing \$s
- Increase company profit and cash flow
- Successfully set-up projects
- Easily complete billing and collecting
- Understand project financial reporting
- Successfully track and report project progress
- Obtain acceptance of changes
- Positively managing the change process
- Learn by doing – i.e. Case Studies and Exercises

OUTLINE

Sessions are developed to meet the needs of employees, clients and 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 and 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*

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:

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

“Extremely valid & useful information that can be readily applied with the assurance that the implementation of ideas will result in positive change.”

“To be successful, we must not only strive to be good technically, but have business savvy as well.”

“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.”

“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.”

“A particular strength was his ability to bring questions and comments from the group to illustrate the big points without going over time.”

“Lee is a very dynamic presenter. It was refreshing to see that he has considerable experience in our field, rather than coming from an entirely different industry.”

INSTRUCTOR

Lee James is a CPA, CMC, CBI who has worked with engineers, architects and contractors through consulting, training and teaching for the past 30 years. 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. 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.

COURSE PROVIDES

A participant manual, handouts and reference materials are provided for use throughout the sessions.

8 hours of PDH's

Refreshments and Lunch Provided

Limit: 30 Registrants

Fee: \$495 per registration
(\$445 early registration before March 17, 2017)