BizTRAK
Your track to the next advancement in your A/E career
SDA is the premier professional organization for A/E/C business and management leadership. The foundation of A/E/C business success is the people and processes upon which it's built. SDA advances both and delivers value to the individual, firm, and industry through education, certification, leadership development, and community.

Now more than ever, rising architects and engineers need to develop their business skills in addition to their technical skills. This program will guide you through the cycle of Project Delivery and see the key to firm success is: Marketing the Project, Executing the Project in a Profitable Way while managing risk, and, Understanding the financial and business underpinnings that holds the firm together.

SDA’s BizTRAK is design for emerging professionals looking to demonstrate their knowledge in practice management and anyone interested in advancing their career into firm management.

Architects | Engineers | Designers who want to:

• Learn the nuances of business development and marketing in the A/E industry and the difference between the two.
• Improve their financial management acumen.
• Learn more about the art of project management from a financial perspective.
• Avoid the pitfalls when starting a firm.

A/E/C Professionals who attend SDA’s BizTRAK program will come away with the following at the end of the day:

• Understand why you earn $37.50/hour and the firm bills you out at $125/hour and that’s not just alright, but good for the firm and you.
• Know why high utilization is good, but not the only piece of the puzzle, and why just high utilization on a team doesn’t guarantee profitability. Why we don’t just dump hours on a project.
• Understand that the cycle always begins with getting the next project and how to accomplish that.

Dollars and Cents

Project and A/E Firm Financial Management
#1 Topic missing from design and engineering curriculums according to recent graduates...

But now, it’s the key to your continued career advancement!
## Typical Agenda

What you should expect to learn in this power one-day seminar

<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
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<tbody>
<tr>
<td>7:30–8:30</td>
<td>Registration</td>
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<tr>
<td>8:30–10:30</td>
<td>Firm Marketing – How to develop your marketing strategy</td>
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<td>In our discussion about Project Marketing, we will highlight key elements of AEC marketing practices such as research, planning, client development, proposals and qualifications, and promotional activity.</td>
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<td>10:00–12:00</td>
<td>Project Management</td>
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<td>This session will take you through the life cycle of a project from generating the proposal, negotiation and creating your budget, execution and analysis, and how to use lessons learned to propose on the next project. Key elements: Calculating bill rates, defining overhead, top down and bottom up budgeting, value based pricing, the benefits of lump sum and hourly work and when to use each, result analysis of two essential KPIs — chargeability and project multiplier.</td>
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<td>12:00–1:30</td>
<td>Networking Lunch</td>
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<td>Connect with other attendees to share what you’re learning and the issues that you are currently facing in your office.</td>
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<tr>
<td>1:30–3:00</td>
<td>Financial Management</td>
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<td>This session will explain the key financial statements, Balance Sheet, Income Statement, and Overhead Statement, and the bottom line concerns of cash flow. It will also cover key financial and performance indicators (KPIs) to understand the key industry metrics you want to use to compare your firm to the industry.</td>
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<tr>
<td>3:00–5:00</td>
<td>Practice Management Business Overview</td>
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<td>This session will cover business entities and organizational structures. Why you want a banker and an insurance broker and key banking and insurance concepts — like the difference between general liability and professional liability insurance and why you want to set up a line of credit (and pay it back). The burden of working for the federal government in today’s world of regulations.</td>
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<tr>
<td>5:00–5:30</td>
<td>Final Q&amp;A</td>
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<td>We answer your questions. Are business skills the track to your next career advancement? Where and how to get the skills and the experience.</td>
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On-Site Program Bonus:  
Receive our SDA Business Toolkit

- Industry Key Performance Indicators — How to Calculate and Industry Benchmarks since 2000
- Business Entities — Comparison table of all types (C Corp, S Corp, Limited Liability Co. [LLC] Partnership)
- Sample financial statements — Balance Sheet, Income Statement, Overhead Statement
- Worksheets on top down and bottom up budgeting, calculating daily wage rates, average man hour rates, and overhead

SDA enhances the professional development and personal growth of its members, and consequently the development and growth of their respective firms.

SDA: Who We Are

For over 60 years, the SDA (Society for Design Administration) has promoted excellence in design firm management through education, and networking. It is the largest organization for managers and administrators in the architectural and engineering industry. SDA membership stretches across the United States and Canada and includes personnel in architecture, engineering, construction, landscape and interior design.

SDA, the recognized leader in education for best practices in the A/E/C industry, offers a credential that recognizes your achieved administrative and management expertise, the Certified Design Firm Administrator (CDFA) designation. The CDFA credential is a voluntary certification designed to elevate the professional standards in design firm management and administration and contribute to the firm’s organizational growth and maturity through better practices in firm management.

Advance your career today by joining SDA. Continuing education not only helps you keep up with industry best practices, it helps keep you relevant in a marketplace where a highly skilled and specialized workforce is in demand. SDA also offers a diverse and vast array of resources and ongoing educational opportunities through programs, forums, webinars, and volunteerism. SDA provides decades of resources in each of the following areas: Finance, Human Resources, Marketing, Office Administration, and Project Management.

To learn more about SDA or the CDFA credential, please visit www.sdanational.org.

To schedule your BusinessTRAK program today, contact SDA National Executive Director, Stephanie Kirschner
Phone: 513.268.5302
E-mail: admin@sdanational.org
www.sdanational.org

Earn up to 8 hours of AIA LUs and/or 8 PDHs.
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