

LEVEL 100

The program will begin with the organizational focus and then will shift to a strategic focus to ensure a holistic view of the business and will include the following:

Session 1 – Overview of the Building Blocks of a Successful Contractor model, program objectives and expectations. Marketing, sales and business development will also be covered.

Session 2 – Estimating Basics including plan reading, quantity takeoffs, material pricing, and assignment of job overhead.

Session 3 – Estimating Basics continued including development of RFP's and presentation skills training.

Session 4 – Effective Pre-Construction Planning including estimating turnovers, pre-job planning, short interval scheduling, daily production targets, exit strategies and lessons learned processes.

Session 5 – Project Management Basics including contract administrations, submittals, RFI's, drawing logs, knowledge management structures, and document control systems.

Session 6 – The Impact of Standardized Work including a case study on merit shop electrical contractors performing 75% of their labor hours in a controlled facility.

Session 7 – Equipment Management Best Practices including system setup, establish a profit and loss statement by equipment category and each piece of equipment, use of telematics, preventative maintenance programs and asset acquisition and divestiture. Additionally, scheduling basics including forward and backward passes as well as logic ties, resource loading, progress over rides, line of balance scheduling and building an effective WBS.

Session 8 – Job Cost best practices including system setup budgets, SOVs, billings, collections, change control, and earned value analysis

Session 9 – Supply Chain management including the importance of managing all the “ing's” such as finding material, pricing, ordering, inventorying, delivering, billing, etc. Additionally, an introduction to business strategy and supporting organizational structures.

Session 10 – Organizational and leadership development including effective communication, relationship building and team building.

At the conclusion of the level 100 program participants will have a basic understanding of a broad range of topics critical to contractor success.

LEVEL 200

The program will expand upon and dive deeper into the topics presented in Level 100 and will include the following:

Session 1 – Project Management I (Killer Contract Clauses, Claims, Change Control, Lawsuits).

Session 2 – Project Management II (Negotiations, Problem Solving, Conflict Resolution).

Session 3 – Project Management III (Management vs Leadership, Fast Paced Business Communication, Employee Engagement).

Session 4 – Finance I (Introduction to Balance Sheet, Income Statement, Statement of Cash Flows).

Session 5 – Finance II (Ratio Analysis, Sample Financials, WIP, Fraud).

Session 6 – Finance III (Banking, Bonding, Insurance, Economic Forecasts).

Session 7 – Manufacturing I (Value Stream Mapping, Radar Charts, Roles and Responsibilities).

Session 8 – Manufacturing II (Swim lane process mapping and relational process mapping).

Session 9 – Manufacturing III (Workplace Organization, Material Requirements Planning, Demand Planning).

Session 10 – Technology (ERP Systems, Technology Strategy, Mobile, Cloud, Integration of Systems).

At the conclusion of the Level 200 program, participants should have a much broader perspective on not only the industry, but the practices successful contractors follow and their role in contributing to that success.

LEVEL 300

The program will expand upon and dive deeper into the topics presented in Level 100 & 200, will shift to a case study format requiring participants to do homework in advance of the session, will provide an opportunity to practically apply what they have learned and will include the following:

Session 1 – Case Study I & II (Strategic Diversification Problem – 90% of work in one vertical) & Case Study II (Organizational Structure Problem – Business has outgrown structure)

Session 2 – Case Study III (Organizational Culture Problem – Toxic Employee that makes the company a lot of money)

Session 3 – Case Study IV (Leadership Problem – Lack of Leadership)

Session 4 – Case Study V (Business Development Problem – Pipeline Management)

Session 5 – Case Study VI (Estimating Problem – Huge Bust – Pricing Issue or Execution Issue)

Session 6 – Case Study VII (Project Management – Juggling Lots of Issues, What takes Priority and Why?)

Session 7 – Case Study VIII (Procurement Issues – Everyday ordering, missed critical releases, supply chain development)

Session 8 – Case Study IX (Claims problem – Schedule delays, trade stacking, concurrent delay arguments, loss in productivity, dilution of supervision, etc.)

Each case study will be based on actual electrical contractors (sanitized for confidentiality) and will require participant to evaluate the organization from multiple dimensions including but not limited to, business development, marketing, finance, execution, cultural, leadership and employee engagement.

At the conclusion of the Level 300 program, participants will have practical experience applying the skills they learned in Levels 100 & 200.

APPENDIX B – CLASS SCHEDULING AND FACILITATING SCHEDULE

	Steph			Michael	
	S100	S200	S300	M200	M300
L100- Building Blocks	Jan 8				
L200- PM Contracts, Change Control, Claims		Jan 8			
L300- Strategic Diversification & Organizational Structure Problems			Jan 7		
L100- Estimating Basics	Jan 23				
L200- PM - Negotiations, Problem Solving, Conflict Resolution		Jan 23			
L300- Organizational Problem			Jan 22		
L100- Estimating Basics part II	Feb 20				
L200- PM - Management vs. Leadership, Business Communication, Employee Engagement		Feb 20			
L300- Leadership Problem			Feb 19		
L100- Pre-Construction Planning	Mar 5				
L200- Finance - BS, IS, Statement of Cash Flows		Mar 5			
L300- Business Development Problem			Mar 4		
L100- PM Basics	Mar 19				
L200- Finance - Ratio Analysis, Sample Financials, WIP, Fraud				Mar 19	
L300- Estimating Problem		Mar 18			
L100- Engineering & Design Standardization	Apr 2				
L200- Finance - Banking, Bonding, Insurance, Economic Forecast				Apr 2	
L300- Project Management			Apr 1		
L100- Equipment Management & Scheduling	Apr 16				
L200- Manufacturing - VSM, Radar Charts, R&R		Apr 16			
L300- Procurement Issues			Apr 15		
L100- Financial Management & Job Cost	Apr 30				
L200- Manufacturing - Swim Lane Process Mapping and Relational Process Mapping		Apr 30			
L300- Claims Problem			Apr 29		
L100- Supply Chain Management & Intro to Business Strategy	May 14				

L200- Manufacturing - WPO, Material Requirements Planning, Demand Planning		May 14			
L100- Organizational Leadership Development & Capstone	May 29				
L200- ERP - Technology Strategy, Mobile, Cloud, Integration of Systems		May 29			

APPENDIX C – SPEAKER BIOS

Michael J. McLin

Michael McLin
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Professional History

- Navigant Consulting Inc.
Director
(2007-2009)
- FMI Corporation
Consulting Team Leader
(2004-2007)
- Fischbach and Moore Electric, Inc.
Project Executive
(1996-2004)
- Sturgeon Electric Company
(1992-1996)

Education

- Masters of Business
Administration
Boston University Graduate
School of Management
- BS in Construction Management
Colorado State University, Fort
Collins, CO

Michael McLin is the Managing Director at Maxim Consulting Group responsible for leading the business and guiding the strategic direction. Michael works with construction related firms of all sizes to evaluate business practices and assist with management challenges. Having worked in the industry, Michael has developed a practical and objective perspective to solving business challenges. Areas of specialization include: organizational assessments, strategic planning, project execution, productivity improvement, prefabrication, peer groups, and training programs. Mr. McLin is a nationally recognized, dynamic public speaker and published author.

Michael is also an experienced peer group manager having consistently run groups whose membership represents some of the largest, most sophisticated contractors in the U.S. He has led electrical, mechanical, dry wall, fire protection, and heavy-civil and general contractor peer groups - both union and non-union. With expertise in many facets of the business, Michael is adept at utilizing tools and analysis available to the peer groups to identify opportunities and challenges within an organization. His structured approach to running peer groups ensures all members have an opportunity to learn and grow.

PROFESSIONAL EXPERIENCE

Mr. McLin's experience in the construction industry spans nearly two decades. He has worked for various contractors as a laborer, operator, CDL driver, foreman, estimator, asset manager, assistant project manager, project manager, and project executive. His project experience includes some of the most complex construction projects undertaken in the U.S. with nearly eight years on Boston's \$14.6BB Central Artery / Tunnel Project.

Stephane A. McShane

Stephane McShane

Director

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Professional History

- Maxim Consulting Group
Senior Consultant
(2011-current)
- Turnupseed Electric
Division Manager
(2010-2011)
- A-C Electric Company, Inc.
Division Manager
(1998-2010)
- Gates Electric Company
(1985-1998)

Stephane McShane is a Director at Maxim Consulting Group responsible for the evaluation and implementation processes with our clients. Stephane works with construction related firms of all sizes to evaluate business practices and assist with management challenges. With a large depth of experience working in the construction industry, Stephane is keenly aware of the business and, most specifically, operational challenges that firms face. Her areas of expertise include: Leadership development, executive coaching, organizational assessments, strategic planning, project execution, business development, productivity improvement, and training programs. Mrs. McShane is an internationally recognized speaker, mentor, author, and teacher. Her ability to motivate, inspire, and create confidence among your work groups is extremely rare and very effective.

PROFESSIONAL EXPERIENCE

Stephane possesses the rare combination of talent from being in the field as an apprentice, electrician, foreman, then working her way through each operational chair within a successful electrical construction firm. Her ability and drive defined her to be "best in class" at each position held. This talent is what makes her tremendously effective at operational and organizational assessments today. She has successfully conquered every operational position from being an estimating trainee through executive management. She has built, trained, and led her teams to become the undisputed leaders in their markets. She is able to quickly identify organizational positives and negatives and assess appropriate action steps and throughputs.