

TRANSFORM

BEST PRACTICES FOR **POWERING** PROFITABLE GROWTH

Register at www.maxwellsystems.com/event

APRIL 7-9, 2014 | CARIBE ROYALE | ORLANDO, FL

TRANSFORM

BEST PRACTICES FOR POWERING PROFITABLE GROWTH

April 7-9, 2014 | Caribe Royale | Orlando, Florida

Letter from Jay Haladay

CEO of Viewpoint Construction Software



As CEO of Viewpoint Construction Software, I'm pleased to announce that Viewpoint has acquired Maxwell Systems, a long time provider of construction software solutions built for contractors including takeoff and estimating, project management and accounting solutions. This acquisition provides Viewpoint the opportunity to extend and increase our ability to provide contemporary and mission-critical software solutions, including estimating, to a broader construction market audience.

I'm happy to be welcoming more than 200 Maxwell team members to provide their talents as part of the Viewpoint family and continue the development and support of core Maxwell products. With this acquisition, our organization will now employ nearly 700 people and will serve more than 8,000 customers worldwide. Over the years, Viewpoint has been very successful in serving the needs of construction organizations that require a highly configurable and scalable ERP solution. With the Maxwell line of products, we can extend our focus on customer care to a large portion of the market — contractors who are looking for an integrated and easy to use solution that's better focused on their business model.

Beyond meeting the needs of a much broader market, I'm excited to lead Viewpoint as the company becomes one of the most comprehensive construction-specific software publishers in the world, providing solutions that address all points of the construction life cycle from estimating and preconstruction to post-project completion and service maintenance.

In closing, I know I can speak for everyone at Viewpoint by saying we value your business, your input, and the opportunity to be part of your best success and moving the construction industry forward.

I look forward to meeting you at this milestone conference!

Sincerely,

Jay Haladay
CEO, Viewpoint Construction Software

VIEWPOINT®

TRANSFORM

BEST PRACTICES FOR POWERING PROFITABLE GROWTH

April 7-9, 2014 | Caribe Royale | Orlando, Florida

Contents

Why You Should Attend	4
About the Conference	5
Keynotes	7
Featured Speakers	9
CPE Credits	11
Schedule-at-a-Glance	12
Breakout Session Planner	13
Breakout Session Descriptions	16
The Maxwell Zone	41
Hotel & Travel Information	42
Registration Form	43

“Our first conference was... GREAT! Thank you for a well executed, professional, fun, friendly, and very productive conference.”

— **Sally O'Brien**
Browning
Contractors Inc.

If you have any questions about the conference, please email **events@maxwellsystems.com** or call 800.688.8226 and ask for the events manager.



Who Should Attend?

The annual conference is designed to offer valuable content for anyone using any of our software, including your company's:

- ✓ Owners
- ✓ Executives
- ✓ Managers
- ✓ Accounting Staff
- ✓ Estimators
- ✓ Project Managers
- ✓ IT Managers
- ✓ Consultants

Having trouble deciding who should attend?
Send everyone!

Group Discount details on the registration form.

Why You Don't Want to Miss This Conference

If you want to experience what a new level of success feels like, then this event is for you. Learn new ways to work more efficiently, discover how you can share real-time information with others, figure out a solution to that unique problem that's been your latest headache, and become a more savvy professional with greater potential than ever.

The Viewpoint (formerly Maxwell Systems) 2014 Annual Conference delivers many worthwhile educational, networking, and consulting opportunities in three days. You can learn new methods about leveraging innovative solutions that can help you work more efficiently and effectively to reach your greatest potential and success.

At the Viewpoint (formerly Maxwell Systems) Annual Conference you will be able to experience:

- ✓ **Best practices** – There will be educational sessions on topics of critical importance within the construction industry. These best practices tracks will provide you with immediate benefit and provide materials to share with the rest of the company when you return to the office.
- ✓ **Training sessions** – Choose from assorted product tracks and hands-on labs, with new or advanced user options, and learn a special skill needed for a particular process and/or to help your team overcome current or future challenges.
- ✓ **Consulting appointments** – Schedule a private one-on-one appointment with a Maxwell Systems expert to answer your questions, offer guidance, and present recommendations to your particular needs.
- ✓ **Peer networking** – Gather valuable resources and advice from your peers in the construction industry and share your own experiences, challenges, and words of wisdom.
- ✓ **Meet with experts** – Speak with industry partners exhibiting their offerings valuable to construction companies or meet one-on-one with Maxwell Systems technology experts, including support representatives, consultants, executives, product managers, and sales professionals.

The Viewpoint (formerly Maxwell Systems) Annual Conference is a powerful way to connect your company's knowledge needs and requirements with the training, guidance, and resources to fulfill them.



Designed exclusively for Viewpoint (formerly Maxwell Systems) customers, the Annual Conference provides tailored program content so you can gain valuable learning and new insights about running a more profitable business.

- ✓ **Learn** about what's happening in the industry, around the country, with technology, regarding processes, and more
- ✓ **Create** a forum for your team to discuss improvements and how to apply them to improve workflow, communications, efficiencies, etc.
- ✓ **Connect** with other construction industry professionals and grow your relationship with your Maxwell Systems support and consulting teams, via networking occasions to share ideas, experiences, and resources

Join us at the conference and you'll see how cost to attend turns to a worthwhile investment. And be sure to check out our various registration rates to see if you can take advantage of any discounts and savings!





About the Conference

The construction game has changed. Turnarounds are faster. Margins are tighter. Competition's tougher. And Viewpoint is helping our customers everywhere to transform the ways they do business to take advantage in today's evolved construction landscape. This April, join Viewpoint at our 2014 Annual Conference for the best practices to empower your company to be more efficient and productive from end to end — and power profitable growth.

Attending construction professionals experience the impact of participating in training sessions, business discussions, and social activities and ultimately are better equipped with knowledge of software capabilities and proven methods to consider and implement, and so are able to move forward with a renewed energy for success. We hope you join us to maximize the investment made in your solution.

Educational Opportunities

- ✓ **Breakout Sessions:** Learn how to use your software solution to its fullest potential and gain valuable insight for your business. Stay within your specific product track or cross-over to one of the other tracks to learn other ways your business could benefit from what Viewpoint has to offer. Improve your overall business with industry insights, learn accounting principles and estimating techniques, see what's new with project management, hear about construction technology tips and trends, and more.
- ✓ **Best Practices:** You don't want to miss the Best Practices sessions! Presented by knowledge experts from Viewpoint and acclaimed authorities on various business management issues, these sessions will deliver a wealth of information. Attendees can improve awareness and understanding of accounting principles, estimating skills, and project management methods, as well as overall business management systems. Presenters will illustrate what you can be doing today and how to plan for the future in order to transform your business and work more knowledgeably and productively to increase profitability. Look for the  symbol in the session planner.

- ✓ **Keynote Sessions:** Everyone should attend these daily general sessions. Monday morning's session is the official welcome to the Viewpoint (formerly Maxwell Systems) 2014 Annual Conference. (see page 7-8 for details).
- ✓ **Consulting by Appointment:** Meet one-on-one with a highly trained Viewpoint professional who can answer your specific questions and offer guidance and recommendations that address your unique needs. Appointments must be scheduled; conference attendees may sign up for a private appointment by visiting the designated registration desk at the conference.
- ✓ **The Maxwell Zone:** Open daily, the Maxwell Zone provides many opportunities to learn about Maxwell Systems software solutions and services and explore offerings of our industry partners. Stop in and meet face to face with technology experts — including support representatives, consultants, executives, and sales professionals — to find out about ProContractor, American Contractor, Management Suite, StreetSmarts, Estimation, and V6.
- ✓ **Hands-On Labs:** Gain hands-on experience by using the software for recently-launched capabilities, to practice new skills or methods learned, or to delve into features you aim to utilize when returning to your office. Admittance is on a first-come, first-served basis. Attendees must pre-register for the lab of their choice when registering for the conference. Space is limited and 2 seats per station. Look for the  symbol in the session planner to designate labs.

“This conference has been very informative and as a new user has made me feel more comfortable with using my solution. Thank You!”

— Karen Watts, JDK LLC



Networking Opportunities

- ✓ **Before the conference:** Join Viewpoint on Facebook to receive updates on conference activity; network with other contractors attending the conference; have open exchange with your industry peers about experiences, successes, obstacles, and more.
- ✓ **During the conference:** We encourage attendees to network throughout conference activities to discover valuable capabilities of your software solution. Learn about new tools and practices that can help you enhance your estimating, accounting, project management, and business leadership efforts. You'll have many opportunities to meet with your construction peers to discuss industry trends and best practices, as well as gain insight into how companies like yours are using a Viewpoint (formerly Maxwell Systems) software solution.
- ✓ **Welcome Reception:** The conference social scene kicks off with a welcome reception from 3:30 – 5:00 PM on Monday, April 7. Browse the exhibits in the Maxwell Zone, mingle with your colleagues, consult the experts, and network with fellow attendees. Attendance is complimentary with your conference registration.



- ✓ **Networking Social Event:** Change your latitude & change your attitude; an evening at Jimmy Buffett's® Margaritaville® is not just an event — it's a vacation. Even non-parrot-heads can't resist the relaxed atmosphere and Buffett inspired design features that will transport us to the shores of Margaritaville. Always a conference highlight, Viewpoint hosts this social event that's not to be missed! Dinner and drinks will be held on Tuesday, April 8 from 7:00 – 10:00 PM (times subject to change). Guest passes are available for \$100 per person.

"The conference was very well done. The sessions were very informative and educational. Maxwell Systems employees are very knowledgeable and helpful. Networking with users was priceless."

— Mike Stewart
Technical Building
Services



Conference Keynotes

Opening General Session

Monday, April 7: 9:00AM – 10:30AM

“Greatly exceeded expectations! Learned more in the last three days about the software I use daily than I have in the past five years.”

— James Camarre,
Mollenberg Betz



A Word from Viewpoint CEO

Jay Haladay

Jay Haladay welcomes conference attendees on Monday morning with exciting news of Viewpoint's acquisition of Maxwell Systems and how customers are now served by a technology partner with even broader depth and comprehensive solution offerings. He will share the company's vision, commitment to collaboration, paths for product innovation, and how the industry can advance by leveraging powerful technology, partnerships, and best practices. Attendees can anticipate learning about software development efforts, as well as solutions in support and services.



The Trouble With The Future Is It's Not What It Used To Be! Transform And Change For Profitable Growth

Murray Banks

It's Game On for Viewpoint (formerly Maxwell Systems) in 2014 so we invite you to take a few minutes to recharge and refocus! Our opening keynote speaker Murray Banks has created a dynamic keynote that will energize and inspire us for the changing world we face.

Murray is the perfect fit for our hard-working, fun-loving Viewpoint Team! He understands the challenges we face and how to convert those challenges to opportunities. He will inspire us with his 10/90 Rule for solving problems, his Lava Lamp Philosophy for continually adapting to change and creating a focus on what we want, not the obstacles we encounter. Murray will humorously drive home the point that “who you are may be more important than what you know” in this business if we expect to be world class in the future.

And Murray knows something about world-class performance... he is an honored educator and world champion athlete. His presentation is the perfect blend of the skills, focus and motivation that earned him Teacher of the Year in Vermont and Gold in the Skiing World Championships. His hilarious images, imaginative videos and poignant stories will challenge and inspire us to continually transform to gain a competitive advantage for 2014!

Transformation and Powering are right up Murray's alley! As a coach, he turned long time losing programs into perennial State Champions. As an educator, his imaginative and innovative teaching techniques earned him the Vermont Teacher of the Year and national Outstanding Educator awards. As an athlete, he has been one of the top finishers in the Ironman Triathlon World Championship in Hawaii, and is a 3-time masters Skiing World Champion.

General Session

Tuesday, April 8: 8:30AM – 9:30AM



Going Up for the Rebound

Anirban Basu
Chairman & CEO of Sage Policy Group, Inc.

This presentation will provide economic updates for the global, national, and regional economies. Special attention will be given to those aspects of economic performance that relate most directly to government finances, including the performance of both labor and housing markets.

Anirban Basu is Chairman & CEO of Sage Policy Group, Inc., an economic and policy consulting firm in Baltimore, Maryland. Mr. Basu is one of the Mid-Atlantic region's most recognizable economists, in part because of his consulting work on behalf of numerous clients, including prominent developers, bankers, brokerage houses, energy suppliers and law firms. On behalf of government agencies and non-profit organizations, Mr. Basu has written several high-profile economic development strategies, including co-authoring economic development strategies for Baltimore City and Baltimore County, Maryland. Among other things, Anirban serves as the chief economist to Associated Builders and Contractors (national) and as chief economic advisor to the Construction Financial Management Association.

General Session

Wednesday, April 9: 8:30AM – 9:30AM



Improving Industry Productivity

Mike Bellaman
President and CEO, Associated Builders and Contractors

We all know we have a workforce shortage but we also have a productivity challenge. In this presentation, Mike Bellaman, President and CEO of Associated Builders and Contractors, will define what that productivity challenge is on a macro and micro level and talk about the three areas we as an industry need to focus on to improve industry productivity. These include project origination and planning, coordination and workflow, and construction crew production.

Michael D. Bellaman has served as president and CEO of Associated Builders and Contractors (ABC) since Feb. 1, 2011. ABC is a national association with 72 chapters representing merit shop construction and construction-related firms. In his role as president and CEO of ABC, Bellaman has focused on increasing the value of ABC to its members and the construction industry. He has prioritized safety by leading an industry-wide effort with the Construction Coalition for a Drug-and-Alcohol Free Workplace and focusing on ABC's Safety Training and Evaluation Process (STEP). As part of his commitment to closing the gap in the construction workforce, ABC joined forces with USA Cares, a partnership which will train veterans for careers in construction. Bellaman also serves as a trustee for the Trimmer Construction Education Foundation, which generates funds to award scholarships and grants in support of construction education. He also has overseen legislative efforts to secure a level playing field for all members of the construction industry — regardless of union affiliation. During his first year of leadership, seven states enacted bans on government-mandated project labor agreements.

Featured Speakers

Viewpoint is excited to present conference attendees with an outstanding lineup of expert speakers to share their best practices, industry insights, strategic thinking, and inspired methods to help you run a better business.

Take some time at the annual conference to hear from a renowned author and business coach, a tax attorney wise to benefits law, a licensed general contractor and construction advisor, a university professor and Fulbright Scholar, FMI knowledge consultants, a world leader in process reliability methods, and a national association's head of federal affairs. A wealth of wisdom will be at your disposal — take advantage of it all and take home more value for your best success.



Leslie Shiner

Leslie Shiner — author, speaker, and trainer — has more than twenty years' experience as a financial and management consultant. She is the owner of The ShinerGroup, a consulting firm helping contractors gain financial control. As a business coach, she has worked with both small and large businesses to help them better understand their business practices and maximize their profits. She is the author of *"A Simple Guide to Turning a Profit as a Contractor."*



Robert Litvin

Robert Litvin is the Managing Partner of Paisner-Litvin LLP. He is an attorney by profession, practicing primarily in Pennsylvania. His practice focuses on the tax and nontax aspects of employee benefits law, including qualified retirement plans, health and welfare plans, executive compensation and stock based compensation arrangements. Mr. Litvin counsels clients on plan design and implementation as well as tax compliance issues. Mr. Litvin also advises employers and plan trustees on fiduciary matters. Mr. Litvin represents clients before the Internal Revenue Service as well as the Department of Labor with regard to employee benefit matters.



Dennis Dixon

Dennis Dixon is an experienced construction advisor, business coach, consultant and speaker addressing the business subjects most important to building and design professionals such as: Business Skills, Contracts, Change Orders, Cost Plus vs. Fixed Price, Design-Build, Development, Estimating, Marketing/Sales, Quality Control and the Financial Aspects of running a successful and profitable construction business. Mr. Dixon is a licensed general contractor with 29+ years' experience in both new construction and remodeling. His company's focus is primarily on custom homes, and also has experience in producing and managing historical restorations, multi-family, remodeling and commercial projects.



Kirk Alter

Kirk Alter is an Associate Professor in Purdue University's Dept. of Building Construction Management, president of Fast Management, Inc., a member of the PHCC Educational Foundation's Board of Governors and director for their management courses. He worked his way up from an apprentice to business owner, which brings a uniquely well-rounded perspective to his training sessions. Kirk is LEED accredited professional, a Fulbright Scholar and has taught management and sustainable construction practices to audiences across the US, Europe and around the world.

Featured Speakers continued



Tyler Pare

As a consultant with FMI, Tyler focuses on leveraging his construction experience, coupled with his advanced knowledge of business mechanics, to help clients mitigate risks and improve productivity. Prior to joining

FMI, Tyler worked for multiple general contractors in the Southeast while completing his undergraduate and graduate educations. Tyler has substantial experience in construction estimating, both in negotiated and hard-bid environments. He also has operations experience, serving as project manager on several commercial and industrial projects.



Preston Ingalls

With over 41 years of experience, Preston Ingalls, President/CEO of TBR Strategies has personally led maintenance and reliability improvement efforts across 29 countries for Royal Dutch Shell,

Aera Energy, Occidental Petroleum, Hess, Skanska, Bayer, Exxon, Baxter Healthcare, Lockheed Martin, Mobil Chemical, Unilever, Monsanto, Pillsbury, Corning, and Texas Instruments. He started his career as a maintenance millwright and held positions of millwright, maintenance engineer, maintenance supervisor, maintenance manager and director of engineering.



Stephen J. Boughton

As a senior consultant with FMI, Steve works with contracting companies nationwide to develop sound strategic solutions to help position them competitively in the marketplace, with a focus on business development

and strategic planning. Prior to joining FMI, Steve spent more than 12 years working in complex sales roles in B2B environments including the aerospace and automotive supply industries. This background enables Steve to help contractors deal with increasingly challenging business relationships. Steve is able to assist contracting companies with strategy and tools which translate into competitive advantages to drive company sales and profitable growth.



Geoff Burr

Geoff Burr is Vice President of Government Affairs at Associated Builders & Contractors in their National office in Washington, DC. As Vice President, Geoff oversees the Legislative, Political, Legal and

Regulatory Departments at ABC, a trade association representing 22,000 contractors, subcontractors, materials suppliers and construction related firms in 70 chapters throughout the country. Geoff also serves as the Chairman of the Coalition for a Democratic Workplace, a coalition of over 600 businesses and organizations founded to protect a worker's right to a federally supervised private ballot election when deciding whether or not to join a union. Prior to accepting his current position, Geoff spent three years as a political appointee, serving in the Bush Administration at the U.S. Department of Labor (DOL).



Dave Berry

As a consultant with FMI, Dave focuses on the areas of Business Development, Finance, Engineering and Production. Prior to joining FMI, Dave spent 10 years in the Aerospace, Defense, and Water Treatment Industries in varying

business development and management roles. In his most recent roles, Dave has focused on company positioning and marketing strategies, financial targets/goals, and financial statement projections to achieve bank and investor financing through the initial stages of production for a start-up company focused on government business. Dave also has experience of working with customers overseas, in the effort to create and pursue business plans regarding major and strategic opportunities in specified markets in order to exceed, improve, and/or increase relations and future business potential.



Kay Wolf

Kay Wolf is an experienced trial lawyer, having tried a variety of discrimination, harassment, and retaliation claims under federal and state law. Kay is Board-certified by the Florida Bar as a Specialist in labor

and employment law and has practiced in the area in both private and public sectors since 1976. Her practice is devoted to providing management with the necessary tools to meet the challenges in today's employment arena through proactive legal advice, training and litigating complex cases in both trial and appellate courts.

"I was beyond impressed with the conference."

**— Michelle Beck
Mavo Systems Inc**

Earn CPE Credits: Up to 13.5 credit hours

The Viewpoint (formerly Maxwell Systems) Annual Conference sessions and educational courses are approved by the National Association of State Boards of Accountancy (NASBA) for Continuing Professional Education (CPE) credits. While you learn how to maximize your Maxwell Systems software solution, you can earn continuing education hours required to keep your license or credential current.



Maxwell Systems, Inc. is registered with NASBA as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North, Suite 700, Nashville, TN, 37219-2417.



“Great classes
and wonderful
networking
opportunity!”

— Jackie Farasyn
Mathiowetz
Construction Company



Schedule-at-a-Glance

Monday, April 7

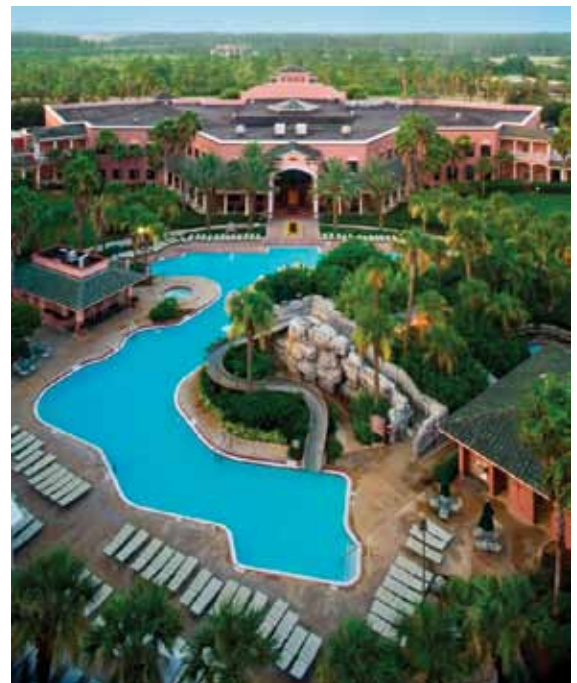
Start	End	Description
7:00 AM	5:00 PM	Registration
7:30 AM	9:00 AM	Breakfast
11:00 AM	4:00 PM	Consulting (by appt only)
9:00 AM	10:30 AM	General Session
10:30 AM	5:00 PM	Exhibit Hall
10:30 AM	11:00 AM	Refreshment Break in Exhibit Hall
11:00 AM	12:00 PM	Breakouts
12:00 PM	1:15 PM	Lunch
1:15 PM	2:15 PM	Breakouts
2:30 PM	3:30 PM	Breakouts
3:30 PM	5:00 PM	Networking Welcome Reception

Tuesday, April 8

Start	End	Description
7:30 AM	8:30 AM	Breakfast
7:30 AM	4:30 PM	Exhibit Hall
8:00 AM	4:30 PM	Consulting (by appt only)
8:30 AM	9:30 AM	General Session
9:45 AM	10:45 AM	Breakouts
10:45 AM	11:00 AM	Refreshment Break in Exhibit Hall
11:00 AM	12:00 PM	Breakouts
12:00 PM	1:15 PM	Lunch
1:15 PM	2:15 PM	Breakouts
2:30 PM	3:30 PM	Breakouts
3:45 PM	4:45 PM	Breakouts
7:00 PM	10:00 PM	Social Event

Wednesday, April 9

Start	End	Description
7:30 AM	8:30 AM	Breakfast
7:30 AM	9:00 AM	Exhibit Hall
8:30 AM	9:00 AM	Exhibitor Raffle
8:30 AM	11:00 AM	Consulting (by appt only)
9:00 AM	10:00 AM	General Session
10:15 AM	11:15 AM	Breakouts
11:15 AM	11:30 AM	Refreshment Break in Foyer
11:30 AM	12:30 PM	Breakouts



Breakout Session Planner Grid

To best plan and utilize your time at the conference, please use this planner to choose one session per time slot. (You are not required to stay within one product track.)

Session Key

- American Contractor
- Management Suite
- Estimation
- ProContractor
- StreetSmarts
- Transformations

- ★ Beginner
- Ω Intermediate
- ◆ Advanced
- 🏆 Best Practices
- 💻 Hands-on Lab

Monday, April 7, 2014			
	11:00 AM – 12:00 PM	1:15 PM – 2:15 PM	2:30 PM – 3:30 PM
American Contractor	<ul style="list-style-type: none"> ★ Report Modifying I for American Contractor (AC01) 🏆 Selling Construction Services (BP01) 🏆 Health Care Reform in 2014 and Other Developments in Employee Benefits (BP02) 🏆 25 Ways to Increase Profits – Part 1 (BP03) 	<ul style="list-style-type: none"> Ω Report Modifying II for American Contractor (AC02) 🏆 Organizing For Growth: How to Build a Sustainable Organization for Good Times and Bad (BP04) 🏆 25 Ways to Increase Profits – Part 2 (BP06) 	<ul style="list-style-type: none"> ◆ Adjusting Payroll in American Contractor (AC03) 🏆 Who Will Run Your Business When You're Gone? Developing Emerging Managers to Run Your Company (BP07) 🏆 How New Federal Regulations, Pending Legislation and the 2014 Midterm Elections Will Impact the Construction Industry (BP08) 🏆 A Project Manager's Guide to the Financial Stuff (BP09)
Management Suite	<ul style="list-style-type: none"> ★ Tips and Tricks: Getting the Most out of Management Suite and How We Can Help You (MS01) ★ Service Work Orders – Managing the Process (MS02) ★ Management Suite Lab: Format/Dimension Report Writing – Beginner (LB01) 🏆 Selling Construction Services (BP01) 🏆 Health Care Reform in 2014 and Other Developments in Employee Benefits (BP02) 🏆 25 Ways to Increase Profits – Part 1 (BP03) 	<ul style="list-style-type: none"> ★ Using DataLink: Getting the Most out of Management Suite and How We Can Help You (MS03) ★ MaxService for Field – How Field Technicians Can Be More Efficient (MS04) 💻 Management Suite Lab: Format/Dimension Report Writing – Advanced (LB03) 🏆 Organizing For Growth: How to Build a Sustainable Organization for Good Times and Bad (BP04) 🏆 25 Ways to Increase Profits – Part 2 (BP06) 	<ul style="list-style-type: none"> ★ Incorporating Office Manager into Your Daily Routine (MS05) ★ MaxService for Back Office – How to Process Details from the Field (MS06) 🏆 Who Will Run Your Business When You're Gone? Developing Emerging Managers to Run Your Company (BP07) 🏆 How New Federal Regulations, Pending Legislation and the 2014 Midterm Elections Will Impact the Construction Industry (BP08) 🏆 A Project Manager's Guide to the Financial Stuff (BP09)
Estimation	<ul style="list-style-type: none"> ★ What's New – Versions 9.5.x and 10.0 for Electrical (ES01) ★ Digital Takeoff Basics for Mechanical and HVAC (ES02) 🏆 Selling Construction Services (BP01) 🏆 Health Care Reform in 2014 and Other Developments in Employee Benefits (BP02) 🏆 25 Ways to Increase Profits – Part 1 (BP03) 	<ul style="list-style-type: none"> ★ Digital Takeoff Basics for Electrical (ES03) ★ What's New – Versions 9.5.x and 10.0 for Mechanical and HVAC (ES04) 🏆 Organizing For Growth: How to Build a Sustainable Organization for Good Times and Bad (BP04) 🏆 25 Ways to Increase Profits – Part 2 (BP06) 	<ul style="list-style-type: none"> ★ Takeoff Tricks and Tips for HVAC (ES05) ★ Takeoff Tricks and Tips for Mechanical (ES06) 💻 Estimation Lab: Open Forum Advanced – Electrical (LB06) 🏆 Who Will Run Your Business When You're Gone? Developing Emerging Managers to Run Your Company (BP07) 🏆 How New Federal Regulations, Pending Legislation and the 2014 Midterm Elections Will Impact the Construction Industry (BP08) 🏆 A Project Manager's Guide to the Financial Stuff (BP09)
ProContractor	<ul style="list-style-type: none"> ◆ Management Financial Analysis for the Large Construction Company (PC01) ★ Digital Takeoff & Advanced Image Manager Best Practices (PC02) ★ Mobile Connect Best Practices (PC03) 💻 ProContractor Lab: Modifying Reports – Accounting & Project Management (LB02) 🏆 Selling Construction Services (BP01) 🏆 Health Care Reform in 2014 and Other Developments in Employee Benefits (BP02) 🏆 25 Ways to Increase Profits – Part 1 (BP03) 	<ul style="list-style-type: none"> ★ The Power of Grids and Views (PC04) ★ Introduction to ProContractor for Earthwork (PC05) Ω Change Management Best Practices (PC06) 💻 ProContractor Lab: Modifying Reports – Estimating (LB04) 🏆 Organizing For Growth: How to Build a Sustainable Organization for Good Times and Bad (BP04) 🏆 25 Ways to Increase Profits – Part 2 (BP06) 	<ul style="list-style-type: none"> ★ Management Financial Analysis for the Small Construction Company (PC07) Ω Introduction to ProContractor for Enterprise Level Assemblies (PC08) Ω Project Accounting for Project Managers (PC09) 🏆 Who Will Run Your Business When You're Gone? Developing Emerging Managers to Run Your Company (BP07) 🏆 How New Federal Regulations, Pending Legislation and the 2014 Midterm Elections Will Impact the Construction Industry (BP08) 🏆 A Project Manager's Guide to the Financial Stuff (BP09)
StreetSmarts	<ul style="list-style-type: none"> ★ Project Management Overview (SS01) 🏆 Selling Construction Services (BP01) 🏆 Health Care Reform in 2014 and Other Developments in Employee Benefits (BP02) 🏆 25 Ways to Increase Profits – Part 1 (BP03) 	<ul style="list-style-type: none"> ★ Equipment Management Overview (SS02) 🏆 Organizing For Growth: How to Build a Sustainable Organization for Good Times and Bad (BP04) 🏆 25 Ways to Increase Profits – Part 2 (BP06) 	<ul style="list-style-type: none"> ★ Plant Management Overview (SS03) 🏆 Who Will Run Your Business When You're Gone? Developing Emerging Managers to Run Your Company (BP07) 🏆 How New Federal Regulations, Pending Legislation and the 2014 Midterm Elections Will Impact the Construction Industry (BP08) 🏆 A Project Manager's Guide to the Financial Stuff (BP09)
Transformations	<ul style="list-style-type: none"> ★ Viewpoint V6 Software Introduction for General Contractors (FT01) 	<ul style="list-style-type: none"> ★ Viewpoint V6 Software Introduction for Heavy Highway (FT02) 	<ul style="list-style-type: none"> ★ Introduction to ProContractor for Specialty Subcontractors (FT03)

	9:45 AM – 10:45 PM	11:00 AM – 12:00 PM	1:15 PM – 2:15 PM	2:30 PM – 3:30 PM	3:45 PM – 4:45 PM
American Contractor	<ul style="list-style-type: none"> ★ Report Modifying I for American Contractor (AC04) 🌟 Elements of Cash Flow Management and Getting Paid (BP10) 🌟 Project Building Blocks – The Estimate: Part 1 (BP11) 🌟 Mitigating Risk through Accurate Mobile Field Data Collection (BP12) 	<ul style="list-style-type: none"> ★ Exploring the Advantages of ProContractor for American Contractor (AC05) ★ American Contractor Lab: Report Modifying I (LB09) 🌟 Key Performance Indicators that Drive Best Practices (BP13) 🌟 Project Building Blocks – The Estimate: Part 2 (BP14) 🌟 Construction in the Cloud: Full Featured, Anytime, Anywhere (BP15) 	<ul style="list-style-type: none"> Ω Document Control for American Contractor (AC06) 🌟 Road Map for Marketing Success (BP16) 🌟 Integrated Pre-Construction Services (BP17) 🌟 Managing Employees in the Payroll System (BP18) 	<ul style="list-style-type: none"> ★ Working with Lists and Views for American Contractor (AC07) 🌟 Estimating for Advantage: Do You Really Know Why You're Bidding This Job? (BP19) 🌟 Technology for Profit (BP20) 🌟 Social Media to Social Business (BP21) 	<ul style="list-style-type: none"> 🌟 Payroll Updating – Union/Merit Shop and Prevailing Wage (AC08) 🌟 American Contractor Lab: Report Modifying II (LB15) 🌟 How to Avoid Confrontation with Change Orders (BP22) 🌟 New Markets and New Opportunities (BP23) 🌟 Cost Reduction in Fleet Management – 74 Tips for Getting Costs Down (BP24)
Management Suite	<ul style="list-style-type: none"> ★ Designing Job Billing Invoices – Using the Forms Designer (MS07) ★ Incorporating Office Manager into Your Daily Routine (MS08) 🌟 Elements of Cash Flow Management and Getting Paid (BP10) 🌟 Project Building Blocks – The Estimate: Part 1 (BP11) 🌟 Mitigating Risk through Accurate Mobile Field Data Collection (BP12) 	<ul style="list-style-type: none"> ★ Creating Document Templates using Microsoft Word Mail Merge (MS09) Ω Management Suite Reporting using ODBC and Microsoft Excel (MS10) 🌟 Key Performance Indicators that Drive Best Practices (BP13) 🌟 Project Building Blocks – The Estimate: Part 2 (BP14) 🌟 Construction in the Cloud: Full Featured, Anytime, Anywhere (BP15) 	<ul style="list-style-type: none"> ★ Understanding Your Job Cost Reports (MS11) ★ Service Ticket Billing – Being More Efficient in the Billing Process (MS12) 🌟 Management Suite Lab: Reporting using ODBC (LB11) 🌟 Road Map for Marketing Success (BP16) 🌟 Integrated Pre-Construction Services (BP17) 🌟 Managing Employees in the Payroll System (BP18) 	<ul style="list-style-type: none"> ★ Explore Alternative: ProContractor All-In-One Construction Software (MS13) ★ Understanding your Service Management Reports (MS14) 🌟 Estimating for Advantage: Do You Really Know Why You're Bidding This Job? (BP19) 🌟 Technology for Profit (BP20) 🌟 Social Media to Social Business (BP21) 	<ul style="list-style-type: none"> ★ Is Moving to ProContractor All-in-One Right For You? (MS15) ★ Tips and Tricks: Getting the Most out of Management Suite and How We Can Help You (MS16) 🌟 How to Avoid Confrontation with Change Orders (BP22) 🌟 New Markets and New Opportunities (BP23) 🌟 Cost Reduction in Fleet Management – 74 Tips for Getting Costs Down (BP24)
Estimation	<ul style="list-style-type: none"> 🌟 Advanced Digital Takeoff for Electrical (ES07) ★ Data File Maintenance for HVAC (Pressure, Labor Tables, Fittings) (ES08) 🌟 Estimation Lab: Open Forum Advanced – Mechanical and HVAC (LB08) 🌟 Elements of Cash Flow Management and Getting Paid (BP10) 🌟 Project Building Blocks – The Estimate: Part 1 (BP11) 🌟 Mitigating Risk through Accurate Mobile Field Data Collection (BP12) 	<ul style="list-style-type: none"> ★ Levels /Summary Reporting / Summary Features for HVAC (ES09) ★ Levels /Summary Reporting / Summary Features for Mechanical (ES10) 🌟 Estimation Lab: Digital Takeoff Tips and Tricks – Electrical (LB10) 🌟 Key Performance Indicators that Drive Best Practices (BP13) 🌟 Project Building Blocks – The Estimate: Part 2 (BP14) 🌟 Construction in the Cloud: Full Featured, Anytime, Anywhere (BP15) 	<ul style="list-style-type: none"> ★ Takeoff Tips and Tricks for Electrical (ES11) ★ Dataset Maintenance for Mechanical (ES12) 🌟 Road Map for Marketing Success (BP16) 🌟 Integrated Pre-Construction Services (BP17) 🌟 Managing Employees in the Payroll System (BP18) 	<ul style="list-style-type: none"> 🌟 Wish List – Development Q & A for Electrical (ES13) 🌟 Advanced Digital Takeoff for Mechanical and HVAC (ES14) 🌟 Estimating for Advantage: Do You Really Know Why You're Bidding This Job? (BP19) 🌟 Technology for Profit (BP20) 🌟 Social Media to Social Business (BP21) 	<ul style="list-style-type: none"> ★ Levels /Summary Reporting / Summary Features for Electrical (ES15) ★ Data Content for Mechanical (ES016) 🌟 Estimation Lab: Digital Takeoff Tips and Tricks – HVAC (LB16) 🌟 How to Avoid Confrontation with Change Orders (BP22) 🌟 New Markets and New Opportunities (BP23) 🌟 Cost Reduction in Fleet Management – 74 Tips for Getting Costs Down (BP24)
ProContractor	<ul style="list-style-type: none"> Ω Material Handling Tips and Tricks (PC10) ★ Introduction to ProContractor for Estimating (PC11) Ω Project Management for Managers and Executives (PC12) 🌟 Elements of Cash Flow Management and Getting Paid (BP10) 🌟 Project Building Blocks – The Estimate: Part 1 (BP11) 🌟 Mitigating Risk through Accurate Mobile Field Data Collection (BP12) 	<ul style="list-style-type: none"> ★ Accounts Payable Best Practices (PC13) ★ Creating and Updating a Successful Estimating Catalog in ProContractor (PC14) 🌟 Key Performance Indicators that Drive Best Practices (BP13) 🌟 Project Building Blocks – The Estimate: Part 2 (BP14) 🌟 Construction in the Cloud: Full Featured, Anytime, Anywhere (BP15) 	<ul style="list-style-type: none"> Ω Payroll-Importing and Workflows (PC16) Ω Work Breakdown Structures (PC17) Ω Scheduling & Daily Field Reporting (PC18) 🌟 ProContractor Lab: Building Enterprise Level Assemblies (LB12) 🌟 Road Map for Marketing Success (BP16) 🌟 Integrated Pre-Construction Services (BP17) 🌟 Managing Employees in the Payroll System (BP18) 	<ul style="list-style-type: none"> Ω Billing: Best Methods for this Key Function (PC19) Ω Create Bids & Proposals in ProContractor (PC20) ★ Using Views and Logs to Better Navigate ProContractor (PC21) 🌟 Estimating for Advantage: Do You Really Know Why You're Bidding This Job? (BP19) 🌟 Technology for Profit (BP20) 🌟 Social Media to Social Business (BP21) 	<ul style="list-style-type: none"> ★ Management Financial Analysis for the Small Construction Company (PC22) Ω Alternates and Change Orders in ProContractor Estimating (PC23) Ω Project Reporting – Progress, Projections, Cost Control, Newly Added Reports, and More (PC24) 🌟 How to Avoid Confrontation with Change Orders (BP22) 🌟 New Markets and New Opportunities (BP23) 🌟 Cost Reduction in Fleet Management – 74 Tips for Getting Costs Down (BP24)
StreetSmarts	<ul style="list-style-type: none"> 🌟 What Can Jet Reports Do For You? (SS04) 🌟 StreetSmarts Lab: Customizing Forms Using StreetSmarts (LB07) 🌟 Elements of Cash Flow Management and Getting Paid (BP10) 🌟 Project Building Blocks – The Estimate: Part 1 (BP11) 🌟 Mitigating Risk through Accurate Mobile Field Data Collection (BP12) 	<ul style="list-style-type: none"> ★ SmartTraxx Speeds Field Data Collection (SS05) 🌟 Key Performance Indicators that Drive Best Practices (BP13) 🌟 Project Building Blocks – The Estimate: Part 2 (BP14) 🌟 Construction in the Cloud: Full Featured, Anytime, Anywhere (BP15) 	<ul style="list-style-type: none"> ★ Project Management Configuration and Processing (SS06) 🌟 Road Map for Marketing Success (BP16) 🌟 Integrated Pre-Construction Services (BP17) 🌟 Managing Employees in the Payroll System (BP18) 	<ul style="list-style-type: none"> ★ Equipment Management Configuration and Processing (SS07) 🌟 Estimating for Advantage: Do You Really Know Why You're Bidding This Job? (BP19) 🌟 Technology for Profit (BP20) 🌟 Social Media to Social Business (BP21) 	<ul style="list-style-type: none"> ★ Plant Management Configuration and Processing (SS08) 🌟 How to Avoid Confrontation with Change Orders (BP22) 🌟 New Markets and New Opportunities (BP23) 🌟 Cost Reduction in Fleet Management – 74 Tips for Getting Costs Down (BP24) ★ StreetSmarts to V6 Migration (FT09)
Transformations	<ul style="list-style-type: none"> ★ Viewpoint V6 Software Service Management Overview (FT04) 	<ul style="list-style-type: none"> ★ Introduction to ProContractor for General Contractors (FT05) ★ Viewpoint For Project Collaboration Overview (FT06) 	<ul style="list-style-type: none"> ★ Introduction to ProContractor for Heavy/Civil Contractors (FT07) 	<ul style="list-style-type: none"> ★ Viewpoint V6 Software Introduction for Specialty/Service (FT08) 	<ul style="list-style-type: none"> ★ StreetSmarts to V6 Migration (FT09)

Breakout Session Planner Grid

To best plan and utilize your time at the conference, please use this planner to choose one session per time slot. (You are not required to stay within one product track.)

Session Key

- American Contractor
- Management Suite
- Estimation
- ProContractor
- StreetSmarts
- Transformations

- ★ Beginner
- Ω Intermediate
- ◆ Advanced
- 🏆 Best Practices
- 🖥️ Hands-on Lab

Wednesday, April 9, 2014		
	10:15 AM – 11:15 AM	11:30 AM – 12:30 PM
American Contractor	<ul style="list-style-type: none"> <input type="checkbox"/> ★ Project Management – Mobility in the Field (AC09) <input type="checkbox"/> ★ Essential Contract Elements, Wording & Sections to Keep You Out of Court (BP25) <input type="checkbox"/> ★ The Declining Mechanic/Technician – Techniques to Address the Shortage (BP26) <input type="checkbox"/> ★ Avoiding Critical & Costly Management Law Errors – A HR Attorney's Perspective (BP27) 	<ul style="list-style-type: none"> <input type="checkbox"/> ◆ Report Modifying ILL for American Contractor (AC10) <input type="checkbox"/> ★ Fast and Accurate Estimating, Budgets, and Job Costing (BP28) <input type="checkbox"/> ★ The Gorman Group – Case Study in Best Practices for Fleet Management (BP29)
Management Suite	<ul style="list-style-type: none"> <input type="checkbox"/> ★ Project Management – Mobility in the Field (MS18) <input type="checkbox"/> ★ Essential Contract Elements, Wording & Sections to Keep You Out of Court (BP25) <input type="checkbox"/> ★ The Declining Mechanic/Technician – Techniques to Address the Shortage (BP26) <input type="checkbox"/> ★ Avoiding Critical & Costly Management Law Errors – A HR Attorney's Perspective (BP27) <input type="checkbox"/> ★ Management Suite to V6 Migration (FT10) 	<ul style="list-style-type: none"> <input type="checkbox"/> ★ Project Management – Managing Documents with Management Suite (MS19) <input type="checkbox"/> ★ What's in the Future for Management Suite? (MS20) <input type="checkbox"/> ★ Fast and Accurate Estimating, Budgets, and Job Costing (BP28) <input type="checkbox"/> ★ The Gorman Group – Case Study in Best Practices for Fleet Management (BP29)
Estimation	<ul style="list-style-type: none"> <input type="checkbox"/> ★ Dataset Maintenance for Electrical (ES17) <input type="checkbox"/> ◆ Wish List – Development Q & A for Mechanical and HVAC (ES18) <input type="checkbox"/> ★ Estimation Lab: Summary Reporting, EZ-Pricer, Export – Electrical (LB18) <input type="checkbox"/> ★ Essential Contract Elements, Wording & Sections to Keep You Out of Court (BP25) <input type="checkbox"/> ★ The Declining Mechanic/Technician – Techniques to Address the Shortage (BP26) <input type="checkbox"/> ★ Avoiding Critical & Costly Management Law Errors – A HR Attorney's Perspective (BP27) 	<ul style="list-style-type: none"> <input type="checkbox"/> ★ Integration – Estimation to Maxwell Solution (ES19) <input type="checkbox"/> ★ Data Content for HVAC (ES20) <input type="checkbox"/> ★ Estimation Lab: Digital Takeoff Tips and Tricks – Mechanical (LB20) <input type="checkbox"/> ★ Fast and Accurate Estimating, Budgets, and Job Costing (BP28) <input type="checkbox"/> ★ The Gorman Group – Case Study in Best Practices for Fleet Management (BP29)
ProContractor	<ul style="list-style-type: none"> <input type="checkbox"/> ★ The Power of Grids and Views (PC25) <input type="checkbox"/> Ω Moving a Won Bid to Project Management (PC26) <input type="checkbox"/> ★ Essential Contract Elements, Wording & Sections to Keep You Out of Court (BP25) <input type="checkbox"/> ★ The Declining Mechanic/Technician – Techniques to Address the Shortage (BP26) <input type="checkbox"/> ★ Avoiding Critical & Costly Management Law Errors – A HR Attorney's Perspective (BP27) 	<ul style="list-style-type: none"> <input type="checkbox"/> ◆ Management Financial Analysis for the Large Construction Company (PC28) <input type="checkbox"/> ★ Q&A with Product Management/Development (PC29) <input type="checkbox"/> ★ Fast and Accurate Estimating, Budgets, and Job Costing (BP28) <input type="checkbox"/> ★ The Gorman Group – Case Study in Best Practices for Fleet Management (BP29) <input type="checkbox"/> ◆ ProContractor Lab: Modifying Reports – Accounting & Project Management (LB19)
StreetSmarts	<ul style="list-style-type: none"> <input type="checkbox"/> ◆ Web Reporting Dashboards (SS09) <input type="checkbox"/> ★ StreetSmarts Lab: From SmartTraxx to StreetSmarts (LB17) <input type="checkbox"/> ★ Essential Contract Elements, Wording & Sections to Keep You Out of Court (BP25) <input type="checkbox"/> ★ The Declining Mechanic/Technician – Techniques to Address the Shortage (BP26) <input type="checkbox"/> ★ Avoiding Critical & Costly Management Law Errors – A HR Attorney's Perspective (BP27) 	<ul style="list-style-type: none"> <input type="checkbox"/> ★ Release 8.4 Planning Session (SS10) <input type="checkbox"/> ★ Fast and Accurate Estimating, Budgets, and Job Costing (BP28) <input type="checkbox"/> ★ The Gorman Group – Case Study in Best Practices for Fleet Management (BP29)
Transformations	<ul style="list-style-type: none"> <input type="checkbox"/> ★ Management Suite to V6 Migration (FT10) <input type="checkbox"/> ★ Viewpoint For Project Collaboration Overview (FT11) 	<ul style="list-style-type: none"> <input type="checkbox"/> ★ The Essential Executive Dashboard- Running Your Construction Business with True Performance Data (FT12)

- ★ Beginner
- 🔑 Best Practices
- 🔗 Intermediate
- 🖨 Hands-on Lab
- ◆ Advanced

Breakout Session Planner Grid To best plan and utilize your time at the conference, please use this planner to choose one session per time slot. (You are not required to stay within one product track.)

MONDAY — APRIL 7

11:00 AM – 12:00 PM

★ Report Modifying I for American Contractor (AC01)

Did you know that you can do a lot of report customization even if you do not have the Report Writer module? In this course, learn how to customize an AR invoice by adding text, pictures and fields. Also learn about using other reports in the system.

🔑 Selling Construction Services (BP01)

Presented by: Steve Boughton, Senior Consultant, FMI

Customers do not like to be sold, but they do like to buy projects that solve their business needs. Explore your expanding role in the “get work” process. Identify the keys to success in positioning your firm over the competition. Understand the role that strategy plays in getting selected. Determine the real decision-making criteria. Find the “hot buttons” and you find the path to selling on value. Discover strategies to keep in touch and build relationships that last. Create the win-strategy that gives you the advantage. Get and keep customers committed.

🔑 Health Care Reform in 2014 and Other Developments in Employee Benefits (BP02)

Presented by: Robert Litvin, Paisner-Litvin LLP

Learn about the latest developments in the various aspects of Health Care Reform (i.e., the Patient Protection and Affordable Care Act) as they pertain to employer health plans.

🔑 25 Ways to Increase Profits – Part 1 (BP03)

Presented by: Leslie Shiner, Owner, The Shiner Group

As a contractor or subcontractor, profits must be based on a process, not accidental. This session focuses on the four key areas of your business to ultimately strengthen your sales, improve your job processes, and increase your profitability. After this fast-paced, action-packed session, participants will leave with a list of 25 ways to implement cost savings measures, efficiency tools, and financial strategies for their companies. Part 1 will focus on strategies related to estimating, sales, and project management.

1:15 PM – 2:15 PM

🔗 Report Modifying II for American Contractor (AC02)

Building on lessons from Report Modifying I, this session will delve deeper into report modifying and how it can be used. Prerequisite: Report Modifying I.

🔑 Organizing For Growth: How to Build a Sustainable Organization for Good Times and Bad (BP04)

Presented by: Steve Boughton, Senior Consultant, FMI

One of the most painful aspects of the recent market downturn has been the trauma experienced by many contractor organizations. Many firms had enjoyed such robust growth during the previous decade that most had never felt the pain of reductions in force, hiring freezes, and cutbacks in professional development that have now become the norm. Now many are questioning if they have the right organizational strategy and resources in place as they prepare to climb out of the “Great Recession.”

1:15 PM – 2:15 PM (continued)

🔑 25 Ways to Increase Profits – Part 2 (BP06)

Presented by: Leslie Shiner, Owner, The Shiner Group

This session will include a discussion on key financial statement ratios and best-of-class benchmarks; healthy contractor financial indicators; unhealthy contractor financial indicators; percentage of completion calculation and analysis; contract analytical procedures such as fade/gain analysis, estimated cost to complete and cash flow position; and other important financial reporting schedules.

2:30 PM – 3:30 PM

◆ Adjusting Payroll in American Contractor (AC03)

Learn how to make adjustments in payroll when necessary to ensure tax liabilities are correct. Discover how to replace lost payroll checks and other payroll situations requiring adjustments of some kind.

🔑 Who Will Run Your Business When You're Gone? Developing Emerging Managers to Run Your Company (BP07)

Presented by: Steve Boughton, Senior Consultant, FMI

You have worked hard over the years to build a successful company and have worn every hat along the way. You have also hired some very talented people to manage projects and provide other technical expertise, but they do not always have the business acumen to manage the financial, marketing, and human capital elements that are critical to running a complex construction company. Although people need to have a solid foundation of technical knowledge, the most successful managers of the future will also have strong management, leadership, and business skills in order to grow their companies profitably.

🔑 How New Federal Regulations, Pending Legislation and the 2014 Midterm Elections Will Impact the Construction Industry (BP08)

Presented by: Geoff Burr, VP of Federal Affairs, Associated Builders and Contractors

New federal regulations becoming effective this Spring will impact contractor's cost base and compliance needs. This presentation will review these new requirements and also look forward to new rulemakings that could become final this year. Additionally, this discussion will focus on the impact of unwavering congressional gridlock and the prospects for change that are presented by the 2014 elections.

🔑 A Project Manager's Guide to the Financial Stuff (BP09)

Presented by: Leslie Shiner, Owner, The Shiner Group

Contractors understand the business of building, but are often intimidated by building a business. An owner or project manager who understands key financial data and reports will be more likely to generate higher profits, avoid boom-and-bust times, and make better business decisions. Learn how to better understand and utilize basic accounting concepts, especially those specific to the construction industry. Discover how to make more money by understanding the nature of costs.

Session Key

- ★ Beginner
- 🏠 Best Practices
- 🔗 Intermediate
- 🖥️ Hands-on Lab
- ◆ Advanced

Breakout Session Planner Grid To best plan and utilize your time at the conference, please use this planner to choose one session per time slot. (You are not required to stay within one product track.)

TUESDAY — APRIL 8

9:45 AM – 10:45 AM

★ Report Modifying I for American Contractor (AC04)

Did you know that you can do a lot of report customization even if you do not have the Report Writer module? In this course, learn how to customize an AR invoice by adding text, pictures and fields. Also learn about using other reports in the system.

🏠 Elements of Cash Flow Management and Getting Paid (BP10)

Presented by: Tyler Pare, Consultant, FMI

Your ability to manage cash flow directly influences your project success. Being aware of these elements, combined with taking action, can lead to project best success. Master the major tasks of analyzing financial statements, tracking cash conversion periods, deciding when and if to borrow, keeping your working capital at adequate levels, and protecting your bonding capacity. After the project is finished, it is time to ask for payment, a time to look at retention and final billing preparation and knowing what your options are.

🏠 Project Building Blocks – The Estimate: Part 1 (BP11)

Presented by: Kirk Alter, Associate Professor in Purdue University's Department of Building Construction Management and president of Fast Management, Inc.

The estimate should be more than just a 'get work' function. It should be the beginning of your plan to build the project profitably. The session focuses on preplanning the estimate so that when you are awarded a project you already have the outline of a successful plan in front of you. Themes include: estimating the project as you plan to build it so that the estimating output you get does not need to be reworked upon award; establishing a labor tracking system with the estimate; and the production of a preliminary schedule as the natural outcome of every estimate.

🏠 Mitigating Risk through Accurate Mobile Field Data Collection (BP12)

Presented by: Mike Merrill, Chief Operating Officer, AboutTime Technologies

With labor being 60% of a construction company's costs, the highest risk in your company comes from not managing your labor effectively. Gone are the days of paper timecards, spreadsheets, and guessing how many man hours were spent on each job and task within a project. Learn how to stay competitive by using newly available "smart" technologies to collect and manage mobile field data.

11:00 AM – 12:00 PM

★ Exploring the Advantages of ProContractor for American Contractor (AC05)

Get your questions answered on moving from American Contractor to ProContractor. Learn about the advantages, what is involved, things to consider, and how to determine how it would work for your organization.

★ 🖥️ American Contractor Lab: Report Modifying I (LB09)

This hands-on lab provides an opportunity for users to modify reports and try the functions discussed in the Report Modifying I sessions.

🏠 Key Performance Indicators that Drive Best Practices (BP13)

Presented by: Tyler Pare, Consultant, FMI

Knowing the score is a very important factor if you are going to win at the game of contracting. But how will you know if you are winning? It's too late to tell if you only gauge success by whether you made or lost money at the end of the job!

11:00 AM – 12:00 PM (continued)

🏠 Project Building Blocks – The Estimate: Part 2 (BP14)

Presented by: Kirk Alter, Associate Professor in Purdue University's Department of Building Construction Management and president of Fast Management, Inc.

This is the second part of this session. The estimate should be more than just a 'get work' function. It should be the beginning of your plan to build the project profitably. The session focuses on preplanning the estimate so that when you are awarded a project you already have the outline of a successful plan in front of you. Themes include: estimating the project as you plan to build it so that the estimating output you get does not need to be reworked upon award; establishing a labor tracking system with the estimate; and the production of a preliminary schedule as the natural outcome of every estimate. Pre-requisite: Project Building Blocks – Part 1

🏠 Construction in the Cloud: Full Featured, Anytime, Anywhere (BP15)

Presented by: Reed Clarke, Director of Sales & Marketing, Trapp Online

This session will cover the differences in the various cloud offerings with respect to efficiency, customization, and security. We will review what to look for in cloud technology and making sure that your data is safe and in a redundant system. Attendees will learn about how to get a customized solution for your technology resources and how to use this to improve workflow; How to make sure that your sensitive data is secure and the proper measures are taken to keep it secure, and Efficiency of cloud solutions and how this directly affects the construction industry.

1:15 PM – 2:15 PM

🔗 Document Control for American Contractor (AC06)

Learn the benefits of Document Control and practical ways to successfully implement Document Control in your business.

🏠 Road Map for Marketing Success (BP16)

Presented by: Tyler Pare, Consultant, FMI

In our industry, it is imperative that manufacturers and distributors understand marketing and have a roadmap to effectively implement marketing strategies. To be successful in your marketing efforts you need to have a marketing plan that encompasses your company's strategic initiatives, existing markets, potential new markets, clients, and the responsibilities of key staff. In this session, you will develop a marketing plan, evaluate the marketing process, understand the external opportunities and threats, examine internal strengths and weaknesses, and set company objectives for your plan.

🏠 Integrated Pre-Construction Services (BP17)

Presented by: Kirk Alter, Associate Professor in Purdue University's Department of Building Construction Management and president of Fast Management, Inc.

Revolutionizing your up-front processes for cash and profit. Have you incorporated a state-of-the-art integrated pre-construction approach to your projects? Or do you estimate, then turn-over/kick-off, and buy-out as your process like you always have? It's time to get in the game and offer added-value to your customers.

🏠 Managing Employees in the Payroll System (BP18)

Presented by: Molly Van Kampen, Director of Sales, Greenshades Software

In this session, we will review best practices for entering, reporting and managing new hire and rehire information in the payroll system to help reduce compliance issues and penalties. We will discuss when it is appropriate to use Social Security Number Verification through the SSA versus e-verify through Homeland Security and how the use of these systems can reduce the likelihood of no match penalties for recipient W-2 records, as well as learn about unemployment filing and new hire reporting, as well as the importance.

Session Key

- ★ Beginner
- 🔑 Best Practices
- 🔗 Intermediate
- 🖨 Hands-on Lab
- ◆ Advanced

Breakout Session Planner Grid To best plan and utilize your time at the conference, please use this planner to choose one session per time slot. (You are not required to stay within one product track.)

TUESDAY — APRIL 8 (continued)

2:30 PM – 3:30 PM

★ Working with Lists and Views for American Contractor (AC07)

Learn how you can create new Lists and use lists to generate Alerts, and create Views for an on-screen reporting tool.

🔑 Estimating for Advantage: Do You Really Know Why You're Bidding This Job? (BP19)

Presented by: David Berry, Consultant, FMI

After a multi-year trend towards negotiated, cooperative procurement of construction services, the pendulum has swung dramatically back to lump sum work. Has your firm lost its edge? Best-in-class contracting organizations are looking at estimating and work acquisition in a completely new way. Are you getting everything you should be from your estimating function?

🔑 Technology for Profit (BP20)

Presented by: Kirk Alter, Associate Professor in Purdue University's Department of Building Construction Management and president of Fast Management, Inc.

What are you doing now? What should you be doing? Planning, estimating, layout, control, reporting, communication, analysis. What apps are you developing to make your company more efficient? How are you using the technology you already have? You see smartphones, iPads, and tablets everywhere – but are they being used to their fullest? What are the apps and accessories needed to make the most of the tools you already have?

🔑 Social Media to Social Business (BP21)

Presented by: Sal Huerta, Vice President, NetPricer.Net

New trends in social media have forced us to look at how we think about and run our businesses. Customers are creating the new digital culture and shifting our business landscapes. Learn why social media is so valuable and how social media is becoming social business.

3:45 PM – 4:45 PM

◆ Payroll Updating – Union/Merit Shop and Prevailing Wage (AC08)

This advanced session will guide you through setting up union and merit shop benefits correctly to take advantage of certified payroll fringe and prevailing wage reporting, and show you how to produce union reports.

◆ 🖨 American Contractor Lab: Report Modifying II (LB15)

This hands-on lab provides an opportunity for users to modify reports and try the functions discussed in the Report Modifying II sessions.

🔑 How to Avoid Confrontation with Change Orders (BP22)

Presented by: David Berry, Consultant, FMI

Let's face it, change orders are a way of life in construction and unfortunately, so is the conflict that seems to be inherent with trying to convince your customer of the added cost that results from a change in project scope. However, there are ways to avoid that confrontation and still be paid for the additional work that you have done.

3:45 PM – 4:45 PM (continued)

🔑 New Markets and New Opportunities (BP23)

Presented by: Kirk Alter, Associate Professor in Purdue University's Department of Building Construction Management and president of Fast Management, Inc.

Markets to be discussed: post-disaster reconstruction, extreme weather events mitigation, shale gas, energy and water for energy, international prefabrication plug and play, water management, food and food processing, mining and extraction, biotechnology and sciences. Where are you on the emerging markets curve? Are you comfortable and safe? Where do you get your market information? How can you stay just ahead of the curve?

🔑 Cost Reduction in Fleet Management – 74 Tips for Getting Costs Down (BP24)

Presented by: Preston Ingalls, President & CEO, TBR Strategies

Cost containment through waste reduction and efficiency improvement is more sustainable than just cost cutting. This session will provide 74 tried and tested means to reduce fleet and facility costs. While some of the techniques will be presented quickly, the more significant ones will be discussed in detail.

WEDNESDAY — APRIL 9

10:15 AM – 11:15 AM

★ Project Management – Mobility in the Field (AC09)

This session will demonstrate how to manage your project documentation remotely using Maxwell Systems Mobile Connect.

🔑 Essential Contract Elements, Wording & Sections to Keep You Out of Court (BP25)

Presented by: Dennis Dixon, President, Dixon Ventures, Inc.

A solid Contract is the foundation for making money and controlling the Client and the Project. Learn essential Contract Sections, Wording, Bullet-Points, and Policies from an experienced contractor and legal expert witness. Simple wording keeps you in control, generates the Project Rules, and reinforces your authority. Learn lessons from three court case examples. Analyze, understand, and discuss the causation and identify solutions to avoid future legal entanglements. Topics covered will be Allowances, Change Orders, Payment Schedules, Specifications, Plan Errors and Omissions, along with your management procedures and policies for the project. Expand your professionalism to understand that a thorough Contract will keep you out of court and maintain a path to profitability. You don't have to be a lawyer to write, edit, and adjust a Contract to fit unique circumstances of any new Project.

🔑 The Declining Mechanic/Technician – Techniques to Address the Shortage (BP26)

Presented by: Preston Ingalls, President & CEO, TBR Strategies

The U.S. is facing a severe shortage of mechanics over the next five years. DOL estimates that for every 10 leaving the workforce through retirement, there will only be five skilled replacements to take their positions. Manpower, the world's largest job placement agency, has identified skilled tradesmen as the Top 10 Most Difficult Jobs to Replace. By the end of this session, attendees will understand the statistics showing the severity of the situation and the impact or consequences, 10 ways to attract people to the profession, and 10 ways to retain the professionals you have.

Session Key

- ★ Beginner
- 🏆 Best Practices
- Ω Intermediate
- 💻 Hands-on Lab
- ◆ Advanced

Breakout Session Planner Grid To best plan and utilize your time at the conference, please use this planner to choose one session per time slot. (You are not required to stay within one product track.)

WEDNESDAY — APRIL 9 (continued)

10:15 AM – 11:15 AM (continued)

🏆 Avoiding Critical & Costly Management Law Errors – A HR Attorney's Perspective (BP27)

Presented by: Kay Wolf, Partner, FordHarrison

By attending this presentation, attendees will learn the mistakes made by managers that lead to costly labor and employment law litigation. This seminar is presented as a high-intensity, interactive presentation that provides a common-sense and practical approach to avoiding workplace litigation.

11:30 AM – 12:30 PM

◆ Report Modifying III for American Contractor (AC10)

Building on lessons from Report Modifying II and the two labs, this session will delve even deeper into report options without the Report Writer module. Learn about data grouping, creating calculating fields, report variables, and much more. Prerequisite: Report Modifying I and II.

🏆 Fast and Accurate Estimating, Budgets, and Job Costing (BP28)

Presented by: Dennis Dixon, President, Dixon Ventures, Inc.

Is Cost Estimating a frustrating component of your bidding procedures? Do you find yourself pricing plans that are not yet completed? Learn tried and true Cost Estimating tips, shortcuts, budgets, and job-costing procedures from a contracting veteran with nearly 30 years' experience so you stay in the profit zone. Learn how to keep the initial "ballpark guesstimate price" from becoming your Contract Price. Compare the pros and cons of Fixed Price vs. Cost Plus bids. Learn new estimating techniques to prepare a Budget, track Actual Job Costing, along with accounting and business methods for Change Orders and Allowances.

🏆 The Gorman Group – Case Study in Best Practices for Fleet Management (BP29)

Presented by: Preston Ingalls, President & CEO, TBR Strategies

The Gorman Group, a New York-based highway paving, and surface repair company that also distributes emulsions for nine New England States, was able to reduce their fleet emergency rate from 35% down to 1.5% while lowering the fleet maintenance costs from 12.1% of FRV down to 2.8% using a process called TPR.

Management Suite

Session Key

- ★ Beginner
- 🏆 Best Practices
- 🔗 Intermediate
- 💻 Hands-on Lab
- ◆ Advanced

Breakout Session Planner Grid To best plan and utilize your time at the conference, please use this planner to choose one session per time slot. (You are not required to stay within one product track.)

MONDAY — APRIL 7

11:00 AM – 12:00 PM

★ Tips and Tricks: Getting the Most out of Management Suite and How We Can Help You (MS01)

This session will provide a refresher of the various shortcuts and some helpful tricks to help you efficiently use your Management Suite software to perform your daily activities.

★ Service Work Orders – Managing the Process (MS02)

Learn tips and tricks to effectively establish, maintain and enhance your work order processes within the system.

★ 💻 Management Suite Lab: Format/Dimension Report Writing – Beginner (LB01)

This hands-on lab covers creating reports with basic calculated fields, filters, and sorts, along with tips and tricks to help in setup.

🏆 Selling Construction Services (BP01)

Presented by: Steve Boughton, Senior Consultant, FMI

Customers do not like to be sold, but they do like to buy projects that solve their business needs. Explore your expanding role in the “get work” process. Identify the keys to success in positioning your firm over the competition. Understand the role that strategy plays in getting selected. Determine the real decision-making criteria. Find the “hot buttons” and you find the path to selling on value. Discover strategies to keep in touch and build relationships that last. Create the win-strategy that gives you the advantage. Get and keep customers committed.

🏆 Health Care Reform in 2014 and Other Developments in Employee Benefits (BP02)

Presented by: Robert Litvin, Paisner-Litvin LLP

Learn about the latest developments in the various aspects of Health Care Reform (i.e., the Patient Protection and Affordable Care Act) as they pertain to employer health plans.

🏆 25 Ways to Increase Profits – Part 1 (BP03)

Presented by: Leslie Shiner, Owner, The Shiner Group

As a contractor or subcontractor, profits must be based on a process, not accidental. This session focuses on the four key areas of your business to ultimately strengthen your sales, improve your job processes, and increase your profitability. After this fast-paced, action-packed session, participants will leave with a list of 25 ways to implement cost savings measures, efficiency tools, and financial strategies for their companies. Part 1 will focus on strategies related to estimating, sales, and project management.

1:15 PM – 2:15 PM

★ Using DataLink: Getting the Most out of Management Suite and How We Can Help You (MS03)

Learn how the DataLink import tools can help with data entry in various entry functions.

1:15 PM – 2:15 PM (continued)

★ MaxService for Field – How Field Technicians Can Be More Efficient (MS04)

Learn how the MaxService mobile field solution can help your field technicians be more productive in performing work, documenting details, and presenting information to the back office to quickly complete billing.

◆ 💻 Management Suite Lab: Format/Dimension Report Writing – Advanced (LB03)

This two-hour hands-on lab will cover more advanced filters and field calculations, as well as how to add a report as a menu item.

🏆 Organizing For Growth: How to Build a Sustainable Organization for Good Times and Bad (BP04)

Presented by: Steve Boughton, Senior Consultant, FMI

One of the most painful aspects of the recent market downturn has been the trauma experienced by many contractor organizations. Many firms had enjoyed such robust growth during the previous decade that most had never felt the pain of reductions in force, hiring freezes, and cutbacks in professional development that have now become the norm. Now many are questioning if they have the right organizational strategy and resources in place as they prepare to climb out of the “Great Recession.”

🏆 25 Ways to Increase Profits – Part 2 (BP06)

Presented by: Leslie Shiner, Owner, The Shiner Group

As a contractor or subcontractor, profits must be based on a process, not accidental. This session focuses on the four key areas of your business to ultimately strengthen your sales, improve your job processes, and increase your profitability. After this fast-paced, action-packed session, participants will leave with a list of 25 ways to implement cost savings measures, efficiency tools, and financial strategies for their companies. Part 2 will focus on strategies related to financial management, analysis, and strategic management. Prerequisite: It is not required, but highly recommended to you attend Part 1 of this session.

2:30 PM – 3:30 PM

★ Incorporating Office Manager into Your Daily Routine (MS05)

See how Office Manager can help you handle daily activities such as manage emails, events, and documents and remind you what needs to be done.

★ MaxService for Back Office – How to Process Details from the Field (MS06)

Learn how to manage the service ticket billing process when the field technicians are using the MaxService mobile field solution, as well as make sure additional revenue opportunities are being pursued.

Management Suite

Session Key

- ★ Beginner
- 🔗 Intermediate
- ◆ Advanced
- 🔗 Best Practices
- 🖨 Hands-on Lab

Breakout Session Planner Grid To best plan and utilize your time at the conference, please use this planner to choose one session per time slot. (You are not required to stay within one product track.)

MONDAY — APRIL 7 (continued)

2:30 PM – 3:30 PM (continued)

🔗 Who Will Run Your Business When You're Gone? Developing Emerging Managers to Run Your Company (BP07)

Presented by: Steve Boughton, Senior Consultant, FMI

You have worked hard over the years to build a successful company and have worn every hat along the way. You have also hired some very talented people to manage projects and provide other technical expertise, but they do not always have the business acumen to manage the financial, marketing, and human capital elements that are critical to running a complex construction company. Although people need to have a solid foundation of technical knowledge, the most successful managers of the future will also have strong management, leadership, and business skills in order to grow their companies profitably.

🔗 How New Federal Regulations, Pending Legislation and the 2014 Midterm Elections Will Impact the Construction Industry (BP08)

Presented by: Geoff Burr, VP of Federal Affairs, Associated Builders and Contractors

New federal regulations becoming effective this Spring will impact contractor's cost base and compliance needs. This presentation will review these new requirements and also look forward to new rulemakings that could become final this year. Additionally, this discussion will focus on the impact of unwavering congressional gridlock and the prospects for change that are presented by the 2014 elections.

🔗 A Project Manager's Guide to the Financial Stuff (BP09)

Presented by: Leslie Shiner, Owner, The Shiner Group

Contractors understand the business of building, but are often intimidated by building a business. An owner or project manager who understands key financial data and reports will be more likely to generate higher profits, avoid boom-and-bust times, and make better business decisions. Learn how to better understand and utilize basic accounting concepts, especially those specific to the construction industry. Discover how to make more money by understanding the nature of costs.

TUESDAY — APRIL 8

9:45 AM – 10:45 AM

★ Designing Job Billing Invoices – Using the Forms Designer (MS07)

Learn how to use the Forms Designer and Invoice Formatter to enhance the look and feel of your plain paper invoices.

★ Incorporating Office Manager into Your Daily Routine (MS08)

See how Office Manager can help you handle daily activities such as manage emails, events, and documents and remind you what needs to be done.

9:45 AM – 10:45 AM (continued)

🔗 Elements of Cash Flow Management and Getting Paid (BP10)

Presented by: Tyler Pare, Consultant, FMI

Your ability to manage cash flow directly influences your project success. Being aware of these elements, combined with taking action, can lead to project best success. Master the major tasks of analyzing financial statements, tracking cash conversion periods, deciding when and if to borrow, keeping your working capital at adequate levels, and protecting your bonding capacity. After the project is finished, it is time to ask for payment, a time to look at retention and final billing preparation and knowing what your options are.

🔗 Project Building Blocks – The Estimate: Part 1 (BP11)

Presented by: Kirk Alter, Associate Professor in Purdue University's Department of Building Construction Management and president of Fast Management, Inc.

The estimate should be more than just a 'get work' function. It should be the beginning of your plan to build the project profitably. The session focuses on preplanning the estimate so that when you are awarded a project you already have the outline of a successful plan in front of you. Themes include: estimating the project as you plan to build it so that the estimating output you get does not need to be reworked upon award; establishing a labor tracking system with the estimate; and the production of a preliminary schedule as the natural outcome of every estimate.

🔗 Mitigating Risk through Accurate Mobile Field Data Collection (BP12)

Presented by: Mike Merrill, Chief Operating Officer, AboutTime Technologies

With labor being 60% of a construction company's costs, the highest risk in your company comes from not managing your labor effectively. Gone are the days of paper timecards, spreadsheets, and guessing how many man hours were spent on each job and task within a project. Learn how to stay competitive by using newly available "smart" technologies to collect and manage mobile field data.

11:00 PM – 12:00 PM

★ Creating Document Templates using Microsoft Word Mail Merge (MS09)

This session will help you use your Management Suite data and Microsoft Office Mail Merge to create templates for various documents, such as Subcontracts, Change Orders, Proposals, and Lien Releases.

🔗 Management Suite Reporting using ODBC and Microsoft Excel (MS10)

Learn how your Management Suite data can be accessed using Microsoft Excel to create reports.

🔗 Key Performance Indicators that Drive Best Practices (BP13)

Presented by: Tyler Pare, Consultant, FMI

Knowing the score is a very important factor if you are going to win at the game of contracting. But how will you know if you are winning? It's too late to tell if you only gauge success by whether you made or lost money at the end of the job!

Management Suite

Session Key

- ★ Beginner
- 🏆 Best Practices
- 🔗 Intermediate
- 💻 Hands-on Lab
- ◆ Advanced

Breakout Session Planner Grid To best plan and utilize your time at the conference, please use this planner to choose one session per time slot. (You are not required to stay within one product track.)

TUESDAY — APRIL 8 (continued)

11:00 PM – 12:00 PM (continued)

🏆 Project Building Blocks – The Estimate: Part 2 (BP14)

Presented by: Kirk Alter, Associate Professor in Purdue University's Department of Building Construction Management and president of Fast Management, Inc.

This is the second part of this session. The estimate should be more than just a 'get work' function. It should be the beginning of your plan to build the project profitably. The session focuses on preplanning the estimate so that when you are awarded a project you already have the outline of a successful plan in front of you. Themes include: estimating the project as you plan to build it so that the estimating output you get does not need to be reworked upon award; establishing a labor tracking system with the estimate; and the production of a preliminary schedule as the natural outcome of every estimate. Pre-requisite: Project Building Blocks – Part 1

🏆 Construction in the Cloud: Full Featured, Anytime, Anywhere (BP15)

Presented by: Reed Clarke, Director of Sales & Marketing, Trapp Online

This session will cover the differences in the various cloud offerings with respect to efficiency, customization, and security. We will review what to look for in cloud technology and making sure that your data is safe and in a redundant system. Attendees will learn about how to get a customized solution for your technology resources and how to use this to improve workflow; How to make sure that your sensitive data is secure and the proper measures are taken to keep it secure, and Efficiency of cloud solutions and how this directly affects the construction industry.

1:15 PM – 2:15 PM

★ Understanding Your Job Cost Reports (MS11)

This session will help you understand the data presented and calculated on the standard job reports and which reports can help you better analyze your business activity.

★ Service Ticket Billing – Being More Efficient in the Billing Process (MS12)

Learn ways to streamline your billing process and expedite from the point of receiving service tickets to producing the invoice.

🏆 Road Map for Marketing Success (BP16)

Presented by: Tyler Pare, Consultant, FMI

In our industry, it is imperative that manufacturers and distributors understand marketing and have a roadmap to effectively implement marketing strategies. To be successful in your marketing efforts you need to have a marketing plan that encompasses your company's strategic initiatives, existing markets, potential new markets, clients, and the responsibilities of key staff. In this session, you will develop a marketing plan, evaluate the marketing process, understand the external opportunities and threats, examine internal strengths and weaknesses, and set company objectives for your plan.

1:15 PM – 2:15 PM (continued)

◆💻 Management Suite Lab: Reporting using ODBC (LB11)

This **two-hour** hands-on lab will show you how to access data and create reports pulling Management Suite data into Microsoft Excel.

🏆 Integrated Pre-Construction Services (BP17)

Presented by: Kirk Alter, Associate Professor in Purdue University's Department of Building Construction Management and president of Fast Management, Inc.

Revolutionizing your up-front processes for cash and profit. Have you incorporated a state-of-the-art integrated pre-construction approach to your projects? Or do you estimate, then turn-over/kick-off, and buy-out as your process like you always have? It's time to get in the game and offer added-value to your customers.

🏆 Managing Employees in the Payroll System (BP18)

Presented by: Molly Van Kampen, Director of Sales, Greenshades Software

In this session, we will review best practices for entering, reporting and managing new hire and rehire information in the payroll system to help reduce compliance issues and penalties. We will discuss when it is appropriate to use Social Security Number Verification through the SSA versus e-verify through Homeland Security and how the use of these systems can reduce the likelihood of no match penalties for recipient W-2 records, as well as learn about unemployment filing and new hire reporting, as well as the importance.

2:30 PM – 3:30 PM

★ Explore Alternative: ProContractor All-In-One Construction Software (MS13)

An introduction to Maxwell's all-in-one software, ProContractor. Learn the basics of this solution and why it may be something to consider to empower your construction organization.

★ Understanding your Service Management Reports (MS14)

This session will help attendees to understand the data presented and calculated on the standard service management reports and which reports can help you better analyze your business activity.

🏆 Estimating for Advantage: Do You Really Know Why You're Bidding This Job? (BP19)

Presented by: David Berry, Consultant, FMI

After a multi-year trend towards negotiated, cooperative procurement of construction services, the pendulum has swung dramatically back to lump sum work. Has your firm lost its edge? Best-in-class contracting organizations are looking at estimating and work acquisition in a completely new way. Are you getting everything you should be from your estimating function?

🏆 Technology for Profit (BP20)

Presented by: Kirk Alter, Associate Professor in Purdue University's Department of Building Construction Management and president of Fast Management, Inc.

What are you doing now? What should you be doing? Planning, estimating, layout, control, reporting, communication, analysis. What apps are you developing to make your company more efficient? How are you using the technology you already have? You see smartphones, iPads, and tablets everywhere – but are they being used to their fullest? What are the apps and accessories needed to make the most of the tools you already have?

Management Suite

Session Key

- ★ Beginner
- 🏆 Best Practices
- 🔗 Intermediate
- 💻 Hands-on Lab
- ◆ Advanced

Breakout Session Planner Grid To best plan and utilize your time at the conference, please use this planner to choose one session per time slot. (You are not required to stay within one product track.)

TUESDAY — APRIL 8 (continued)

2:30 PM – 3:30 PM (continued)

🏆 Social Media to Social Business (BP21)

Presented by: Sal Huerta, Vice President, NetPricer.Net

New trends in social media have forced us to look at how we think about and run our businesses. Customers are creating the new digital culture and shifting our business landscapes. Learn why social media is so valuable and how social media is becoming social business.

3:45 PM – 4:45 PM

★ Is Moving to ProContractor All-in-One Right For You? (MS15)

In this session, you can get all your questions answered about what to expect if you're considering moving to ProContractor. Learn if it makes sense for your organization, what is involved, things to consider, and how to determine the right time to move.

★ Tips and Tricks: Getting the Most out of Management Suite and How We Can Help You (MS16)

This session will provide a refresher of the various shortcuts and some helpful tricks to help you efficiently use your Management Suite software to perform your daily activities.

🏆 How to Avoid Confrontation with Change Orders (BP22)

Presented by: David Berry, Consultant, FMI

Let's face it, change orders are a way of life in construction and unfortunately, so is the conflict that seems to be inherent with trying to convince your customer of the added cost that results from a change in project scope. However, there are ways to avoid that confrontation and still be paid for the additional work that you have done.

🏆 New Markets and New Opportunities (BP23)

Presented by: Kirk Alter, Associate Professor in Purdue University's Department of Building Construction Management and president of Fast Management, Inc.

Markets to be discussed: post-disaster reconstruction, extreme weather events mitigation, shale gas, energy and water for energy, international prefabrication plug and play, water management, food and food processing, mining and extraction, biotechnology and sciences. Where are you on the emerging markets curve? Are you comfortable and safe? Where do you get your market information? How can you stay just ahead of the curve?

🏆 Cost Reduction in Fleet Management – 74 Tips for Getting Costs Down (BP24)

Presented by: Preston Ingalls, President & CEO, TBR Strategies

Cost containment through waste reduction and efficiency improvement is more sustainable than just cost cutting. This session will provide 74 tried and tested means to reduce fleet and facility costs. While some of the techniques will be presented quickly, the more significant ones will be discussed in detail.

WEDNESDAY — APRIL 9

10:15 AM – 11:15 AM

★ Project Management – Mobility in the Field (MS18)

This session will demonstrate how to manage your project documentation remotely using Maxwell Systems Mobile Connect.

🏆 Essential Contract Elements, Wording & Sections to Keep You Out of Court (BP25)

Presented by: Dennis Dixon, President, Dixon Ventures, Inc.

A solid Contract is the foundation for making money and controlling the Client and the Project. Learn essential Contract Sections, Wording, Bullet-Points, and Policies from an experienced contractor and legal expert witness. Simple wording keeps you in control, generates the Project Rules, and reinforces your authority. Learn lessons from three court case examples. Analyze, understand, and discuss the causation and identify solutions to avoid future legal entanglements. Topics covered will be Allowances, Change Orders, Payment Schedules, Specifications, Plan Errors and Omissions, along with your management procedures and policies for the project. Expand your professionalism to understand that a thorough Contract will keep you out of court and maintain a path to profitability. You don't have to be a lawyer to write, edit, and adjust a Contract to fit unique circumstances of any new Project.

🏆 The Declining Mechanic/Technician – Techniques to Address the Shortage (BP26)

Presented by: Preston Ingalls, President & CEO, TBR Strategies

The U.S. is facing a severe shortage of mechanics over the next five years. DOL estimates that for every 10 leaving the workforce through retirement, there will only be five skilled replacements to take their positions. Manpower, the world's largest job placement agency, has identified skilled tradesmen as the Top 10 Most Difficult Jobs to Replace. By the end of this session, attendees will understand the statistics showing the severity of the situation and the impact or consequences, 10 ways to attract people to the profession, and 10 ways to retain the professionals you have.

🏆 Avoiding Critical & Costly Management Law Errors – A HR Attorney's Perspective (BP27)

Presented by: Kay Wolf, Partner, FordHarrison

By attending this presentation, attendees will learn the mistakes made by managers that lead to costly labor and employment law litigation. This seminar is presented as a high-intensity, interactive presentation that provides a common-sense and practical approach to avoiding workplace litigation.

★ Management Suite to V6 Migration (FT10)

This session will provide current users with insight into what it means to migrate their business operations from Maxwell Management Suite to the Viewpoint V6 solution. Discussion will include an overview of key feature/functionality considerations between the products as well as what the sales and implementation processes will look like when it's time to make this move.

Management Suite

Session Key

- ★ Beginner
- 🏆 Best Practices
- Ω Intermediate
- 💻 Hands-on Lab
- ◆ Advanced

Breakout Session Planner Grid To best plan and utilize your time at the conference, please use this planner to choose one session per time slot. (You are not required to stay within one product track.)

WEDNESDAY — APRIL 9 (continued)

11:30 AM – 12:30 PM

★ Project Management – Managing Documents with Management Suite (MS19)

Learn how to create and track various project documents, including Requests for Information, Submittals, Change Order Requests, and Owner Change Orders.

★ What's in the Future for Management Suite? (MS20)

This session will focus on recent updates and future activities for the Management Suite solution.

🏆 Fast and Accurate Estimating, Budgets, and Job Costing (BP28)

Presented by: Dennis Dixon, President, Dixon Ventures, Inc.

Is Cost Estimating a frustrating component of your bidding procedures? Do you find yourself pricing plans that are not yet completed? Learn tried and true Cost Estimating tips, shortcuts, budgets, and job-costing procedures from a contracting veteran with nearly 30 years' experience so you stay in the profit zone. Learn how to keep the initial "ballpark guesstimate price" from becoming your Contract Price. Compare the pros and cons of Fixed Price vs. Cost Plus bids. Learn new estimating techniques to prepare a Budget, track Actual Job Costing, along with accounting and business methods for Change Orders and Allowances.

🏆 The Gorman Group – Case Study in Best Practices for Fleet Management (BP29)

Presented by: Preston Ingalls, President & CEO, TBR Strategies

The Gorman Group, a New York-based highway paving, and surface repair company that also distributes emulsions for nine New England States, was able to reduce their fleet emergency rate from 35% down to 1.5% while lowering the fleet maintenance costs from 12.1% of FRV down to 2.8% using a process called TPR.

Estimation

Session Key

- ★ Beginner
- 🏠 Best Practices
- 🔗 Intermediate
- 💻 Hands-on Lab
- ◆ Advanced

Breakout Session Planner Grid To best plan and utilize your time at the conference, please use this planner to choose one session per time slot. (You are not required to stay within one product track.)

MONDAY — APRIL 7

11:00 AM – 12:00 PM

★ What's New – Versions 9.5.x and 10.0 for Electrical (ES01)

Learn about new Electrical features and enhancements that Estimation version 9.x and 10.0 have to offer.

★ Digital Takeoff Basics for Mechanical and HVAC (ES02)

Learn the basics of Digital Takeoff, including drawing import, compensation, manipulating, annotations, editing, notes, and managing sheet revisions.

🏠 Selling Construction Services (BP01)

Presented by: Steve Boughton, Senior Consultant, FMI

Customers do not like to be sold, but they do like to buy projects that solve their business needs. Explore your expanding role in the "get work" process. Identify the keys to success in positioning your firm over the competition. Understand the role that strategy plays in getting selected. Determine the real decision-making criteria. Find the "hot buttons" and you find the path to selling on value. Discover strategies to keep in touch and build relationships that last. Create the win-strategy that gives you the advantage. Get and keep customers committed.

🏠 Health Care Reform in 2014 and Other Developments in Employee Benefits (BP02)

Presented by: Robert Litvin, Paisner-Litvin LLP

Learn about the latest developments in the various aspects of Health Care Reform (i.e., the Patient Protection and Affordable Care Act) as they pertain to employer health plans.

🏠 25 Ways to Increase Profits – Part 1 (BP03)

Presented by: Leslie Shiner, Owner, The Shiner Group

As a contractor or subcontractor, profits must be based on a process, not accidental. This session focuses on the four key areas of your business to ultimately strengthen your sales, improve your job processes, and increase your profitability. After this fast-paced, action-packed session, participants will leave with a list of 25 ways to implement cost savings measures, efficiency tools, and financial strategies for their companies. Part 1 will focus on strategies related to estimating, sales, and project management.

1:15 PM – 2:15 PM

★ Digital Takeoff Basics for Electrical (ES03)

Learn the basics of Digital Takeoff, including drawing import, compensation, manipulating, annotations, editing, notes, and managing sheet revisions.

★ What's New – Versions 9.5.x and 10.0 for Mechanical and HVAC (ES04)

Learn about new Mechanical and HVAC features and enhancements that Estimation version 9.x and 10.0 have to offer.

1:15 PM – 2:15 PM (continued)

🏠 Organizing For Growth: How to Build a Sustainable Organization for Good Times and Bad (BP04)

Presented by: Steve Boughton, Senior Consultant, FMI

One of the most painful aspects of the recent market downturn has been the trauma experienced by many contractor organizations. Many firms had enjoyed such robust growth during the previous decade that most had never felt the pain of reductions in force, hiring freezes, and cutbacks in professional development that have now become the norm. Now many are questioning if they have the right organizational strategy and resources in place as they prepare to climb out of the "Great Recession."

🏠 25 Ways to Increase Profits – Part 2 (BP06)

Presented by: Leslie Shiner, Owner, The Shiner Group

As a contractor or subcontractor, profits must be based on a process, not accidental. This session focuses on the four key areas of your business to ultimately strengthen your sales, improve your job processes, and increase your profitability. After this fast-paced, action-packed session, participants will leave with a list of 25 ways to implement cost savings measures, efficiency tools, and financial strategies for their companies. Part 2 will focus on strategies related to financial management, analysis, and strategic management. Prerequisite: It is not required, but highly recommended to you attend Part 1 of this session.

2:30 PM – 3:30 PM

★ Takeoff Tricks and Tips for HVAC (ES05)

Discuss with fellow estimators the tips, tricks, and shortcuts when using standard Takeoff features.

★ Takeoff Tricks and Tips for Mechanical (ES06)

Discuss with fellow estimators the tips, tricks, and shortcuts when using standard Takeoff features.

◆ 💻 Estimation Lab: Open Forum Advanced – Electrical (LB06)

This hands-on open forum is for advanced users of Estimation Electrical. It will include conversations and a walk-through of advanced features as well as your own topics for discussion.

🏠 Who Will Run Your Business When You're Gone? Developing Emerging Managers to Run Your Company (BP07)

Presented by: Steve Boughton, Senior Consultant, FMI

You have worked hard over the years to build a successful company and have worn every hat along the way. You have also hired some very talented people to manage projects and provide other technical expertise, but they do not always have the business acumen to manage the financial, marketing, and human capital elements that are critical to running a complex construction company. Although people need to have a solid foundation of technical knowledge, the most successful managers of the future will also have strong management, leadership, and business skills in order to grow their companies profitably.

Estimation

Session Key

- ★ Beginner
- 🏆 Best Practices
- 🔗 Intermediate
- 🖨 Hands-on Lab
- ◆ Advanced

Breakout Session Planner Grid To best plan and utilize your time at the conference, please use this planner to choose one session per time slot. (You are not required to stay within one product track.)

MONDAY — APRIL 7 (continued)

2:30 PM – 3:30 PM (continued)

🏆 How New Federal Regulations, Pending Legislation and the 2014 Midterm Elections Will Impact the Construction Industry (BP08)

Presented by: Geoff Burr, VP of Federal Affairs, Associated Builders and Contractors

New federal regulations becoming effective this Spring will impact contractor's cost base and compliance needs. This presentation will review these new requirements and also look forward to new rulemakings that could become final this year. Additionally, this discussion will focus on the impact of unwavering congressional gridlock and the prospects for change that are presented by the 2014 elections.

🏆 A Project Manager's Guide to the Financial Stuff (BP09)

Presented by: Leslie Shiner, Owner, The Shiner Group

Contractors understand the business of building, but are often intimidated by building a business. An owner or project manager who understands key financial data and reports will be more likely to generate higher profits, avoid boom-and-bust times, and make better business decisions. Learn how to better understand and utilize basic accounting concepts, especially those specific to the construction industry. Discover how to make more money by understanding the nature of costs.

TUESDAY — APRIL 8

9:45 AM – 10:45 AM

◆ Advanced Digital Takeoff for Electrical (ES07)

Learn advanced features with Digital Takeoff like Sheet Alignment, Shape Recognition, Custom Views, Layers/Level connectivity and more. Prerequisite: Digital Takeoff Basics for Electrical

★ Data File Maintenance for HVAC (Pressure, Labor Tables, Fittings) (ES08)

Learn how to maintain the HVAC data files, including Pressure Tables, Design Specs, Databook, and Labor Tables.

🏆 Elements of Cash Flow Management and Getting Paid (BP10)

Presented by: Tyler Pare, Consultant, FMI

Your ability to manage cash flow directly influences your project success. Being aware of these elements, combined with taking action, can lead to project best success. Master the major tasks of analyzing financial statements, tracking cash conversion periods, deciding when and if to borrow, keeping your working capital at adequate levels, and protecting your bonding capacity. After the project is finished, it is time to ask for payment, a time to look at retention and final billing preparation and knowing what your options are.

🏆 Project Building Blocks – The Estimate: Part 1 (BP11)

Presented by: Kirk Alter, Associate Professor in Purdue University's Department of Building Construction Management and president of Fast Management, Inc.

The estimate should be more than just a 'get work' function. It should be the beginning of your plan to build the project profitably. The session focuses on preplanning the estimate so that when you are awarded a project you already have the outline of a successful plan in front of you. Themes include: estimating the project as you plan to build it so that the estimating output you get does not need to be reworked upon award; establishing a labor tracking system with the estimate; and the production of a preliminary schedule as the natural outcome of every estimate.

9:45 AM – 10:45 AM (continued)

🏆 Mitigating Risk through Accurate Mobile Field Data Collection (BP12)

Presented by: Mike Merrill, Chief Operating Officer, AboutTime Technologies

With labor being 60% of a construction company's costs, the highest risk in your company comes from not managing your labor effectively. Gone are the days of paper timecards, spreadsheets, and guessing how many man hours were spent on each job and task within a project. Learn how to stay competitive by using newly available "smart" technologies to collect and manage mobile field data.

◆ 🖨 Estimation Lab: Open Forum Advanced – Mechanical and HVAC (LB08)

This hands-on open forum is for advanced users of Estimation for Mechanical and HVAC. It will include conversations and a walk-through of advanced features as well as your own topics for discussion.

11:00 AM – 12:00 PM

★ Levels / Summary Reporting / Summary Features for HVAC (ES09)

Learn about Summary reporting, including level breakout, unit cost reporting, views and sorting profiles, multi-item editing, subtotal and phase reporting, preferences, and updating data.

★ Levels / Summary Reporting / Summary Features for Mechanical (ES10)

Learn about Summary reporting, including level breakout, unit cost reporting, views and sorting profiles, multi-item editing, subtotal and phase reporting, preferences, and updating data. Prerequisite: Takeoff Tips and Tricks for Mechanical

★ 🖨 Estimation Lab: Digital Takeoff Tips and Tricks – Electrical (LB10)

This hands-on lab helps you use valuable tips and tricks relating to your Electrical takeoff tools.

🏆 Key Performance Indicators that Drive Best Practices (BP13)

Presented by: Tyler Pare, Consultant, FMI

Knowing the score is a very important factor if you are going to win at the game of contracting. But how will you know if you are winning? It's too late to tell if you only gauge success by whether you made or lost money at the end of the job!

🏆 Project Building Blocks – The Estimate: Part 2 (BP14)

Presented by: Kirk Alter, Associate Professor in Purdue University's Department of Building Construction Management and president of Fast Management, Inc.

This is the second part of this session. The estimate should be more than just a 'get work' function. It should be the beginning of your plan to build the project profitably. The session focuses on preplanning the estimate so that when you are awarded a project you already have the outline of a successful plan in front of you. Themes include: estimating the project as you plan to build it so that the estimating output you get does not need to be reworked upon award; establishing a labor tracking system with the estimate; and the production of a preliminary schedule as the natural outcome of every estimate. Pre-requisite: Project Building Blocks – Part 1

Estimation

Session Key

- ★ Beginner
- 🏆 Best Practices
- 🔗 Intermediate
- 💻 Hands-on Lab
- ◆ Advanced

Breakout Session Planner Grid To best plan and utilize your time at the conference, please use this planner to choose one session per time slot. (You are not required to stay within one product track.)

TUESDAY — APRIL 8 (continued)

11:00 AM – 12:00 PM (continued)

🏆 Construction in the Cloud: Full Featured, Anytime, Anywhere (BP15)

Presented by: Reed Clarke, Director of Sales & Marketing, Trapp Online

This session will cover the differences in the various cloud offerings with respect to efficiency, customization, and security. We will review what to look for in cloud technology and making sure that your data is safe and in a redundant system. Attendees will learn about how to get a customized solution for your technology resources and how to use this to improve workflow; How to make sure that your sensitive data is secure and the proper measures are taken to keep it secure, and Efficiency of cloud solutions and how this directly affects the construction industry.

1:15 PM – 2:15 PM

★ Takeoff Tips and Tricks for Electrical (ES11)

Discuss with fellow estimators the tips, tricks, and shortcuts when using standard Takeoff features.

★ Dataset Maintenance for Mechanical (ES12)

Learn about the basics of building assemblies, design specifications in the estimate, and data files. Discover the best practice and use of assemblies and design specs.

🏆 Road Map for Marketing Success (BP16)

Presented by: Tyler Pare, Consultant, FMI

In our industry, it is imperative that manufacturers and distributors understand marketing and have a roadmap to effectively implement marketing strategies. To be successful in your marketing efforts you need to have a marketing plan that encompasses your company's strategic initiatives, existing markets, potential new markets, clients, and the responsibilities of key staff. In this session, you will develop a marketing plan, evaluate the marketing process, understand the external opportunities and threats, examine internal strengths and weaknesses, and set company objectives for your plan.

🏆 Integrated Pre-Construction Services (BP17)

Presented by: Kirk Alter, Associate Professor in Purdue University's Department of Building Construction Management and president of Fast Management, Inc.

Revolutionizing your up-front processes for cash and profit. Have you incorporated a state-of-the-art integrated pre-construction approach to your projects? Or do you estimate, then turn-over/kick-off, and buy-out as your process like you always have? It's time to get in the game and offer added-value to your customers.

🏆 Managing Employees in the Payroll System (BP18)

Presented by: Molly Van Kampen, Director of Sales, Greenshades Software

In this session, we will review best practices for entering, reporting and managing new hire and rehire information in the payroll system to help reduce compliance issues and penalties. We will discuss when it is appropriate to use Social Security Number Verification through the SSA versus e-verify through Homeland Security and how the use of these systems can reduce the likelihood of no match penalties for recipient W-2 records, as well as learn about unemployment filing and new hire reporting, as well as the importance.

2:30 PM – 3:30 PM

◆ Wish List – Development Q & A for Electrical (ES13)

Meet with the Development Team to discuss current and future development of Estimation for the Electrical Trade.

◆ Advanced Digital Takeoff for Mechanical and HVAC (ES14)

Learn advanced features with Digital Takeoff like Sheet Alignment, Shape Recognition, Custom Views, Layers/Level connectivity, and more. Prerequisite: Digital Takeoff Basics for Mechanical

🏆 Estimating for Advantage: Do You Really Know Why You're Bidding This Job? (BP19)

Presented by: David Berry, Consultant, FMI

After a multi-year trend towards negotiated, cooperative procurement of construction services, the pendulum has swung dramatically back to lump sum work. Has your firm lost its edge? Best-in-class contracting organizations are looking at estimating and work acquisition in a completely new way. Are you getting everything you should be from your estimating function?

🏆 Technology for Profit (BP20)

Presented by: Kirk Alter, Associate Professor in Purdue University's Department of Building Construction Management and president of Fast Management, Inc.

What are you doing now? What should you be doing? Planning, estimating, layout, control, reporting, communication, analysis. What apps are you developing to make your company more efficient? How are you using the technology you already have? You see smartphones, iPads, and tablets everywhere – but are they being used to their fullest? What are the apps and accessories needed to make the most of the tools you already have?

🏆 Social Media to Social Business (BP21)

Presented by: Sal Huerta, Vice President, NetPricer.Net

New trends in social media have forced us to look at how we think about and run our businesses. Customers are creating the new digital culture and shifting our business landscapes. Learn why social media is so valuable and how social media is becoming social business.

3:45 PM – 4:45 PM

★ Levels / Summary Reporting / Summary Features for Electrical (ES15)

Learn about Summary reporting, including level breakout, unit cost reporting, views and sorting profiles, multi-item editing, subtotal and phase reporting, preferences, and updating data. Prerequisite: Takeoff Tips and Tricks for Electrical

★ Data Content for Mechanical (ES016)

Open discussion of current and future data development within the Mechanical program. Review new materials and labor units.

Estimation

Session Key

- ★ Beginner
- 🔑 Best Practices
- 🔗 Intermediate
- 🖥️ Hands-on Lab
- ◆ Advanced

Breakout Session Planner Grid To best plan and utilize your time at the conference, please use this planner to choose one session per time slot. (You are not required to stay within one product track.)

TUESDAY — APRIL 8 (continued)

3:45 PM – 4:45 PM (continued)

🔑 How to Avoid Confrontation with Change Orders (BP22)

Presented by: David Berry, Consultant, FMI

Let's face it, change orders are a way of life in construction and unfortunately, so is the conflict that seems to be inherent with trying to convince your customer of the added cost that results from a change in project scope. However, there are ways to avoid that confrontation and still be paid for the additional work that you have done.

🔑 New Markets and New Opportunities (BP23)

Presented by: Kirk Alter, Associate Professor in Purdue University's Department of Building Construction Management and president of Fast Management, Inc.

Markets to be discussed: post-disaster reconstruction, extreme weather events mitigation, shale gas, energy and water for energy, international prefabrication plug and play, water management, food and food processing, mining and extraction, biotechnology and sciences. Where are you on the emerging markets curve? Are you comfortable and safe? Where do you get your market information? How can you stay just ahead of the curve?

🔑 Cost Reduction in Fleet Management – 74 Tips for Getting Costs Down (BP24)

Presented by: Preston Ingalls, President & CEO, TBR Strategies

Cost containment through waste reduction and efficiency improvement is more sustainable than just cost cutting. This session will provide 74 tried and tested means to reduce fleet and facility costs. While some of the techniques will be presented quickly, the more significant ones will be discussed in detail.

★ 🖥️ Estimation Lab: Digital Takeoff Tips and Tricks – HVAC (LB16)

This hands-on lab helps you use valuable tips and tricks relating to your HVAC takeoff tools.

WEDNESDAY — APRIL 9

10:15 AM – 11:15 AM

★ Dataset Maintenance for Electrical (ES17)

Learn how to maintain the data files and system configurations, including Bid Templates, Levels, Sections, Takeoff Options, and Summary setup.

◆ Wish List – Development Q & A for Mechanical and HVAC (ES18)

Meet with the Development Team to discuss current and future development of Estimation for the Mechanical and HVAC Trades.

★ 🖥️ Estimation Lab: Summary Reporting, EZ-Pricer, Export – Electrical (LB18)

This hands-on lab will show you how to automatically create a request for quotes directly from your job data and send to your local suppliers via e-mail.

10:15 AM – 11:15 AM (continued)

🔑 Essential Contract Elements, Wording & Sections to Keep You Out of Court (BP25)

Presented by: Dennis Dixon, President, Dixon Ventures, Inc.

A solid Contract is the foundation for making money and controlling the Client and the Project. Learn essential Contract Sections, Wording, Bullet-Points, and Policies from an experienced contractor and legal expert witness. Simple wording keeps you in control, generates the Project Rules, and reinforces your authority. Learn lessons from three court case examples. Analyze, understand, and discuss the causation and identify solutions to avoid future legal entanglements. Topics covered will be Allowances, Change Orders, Payment Schedules, Specifications, Plan Errors and Omissions, along with your management procedures and policies for the project. Expand your professionalism to understand that a thorough Contract will keep you out of court and maintain a path to profitability. You don't have to be a lawyer to write, edit, and adjust a Contract to fit unique circumstances of any new Project.

🔑 The Declining Mechanic/Technician – Techniques to Address the Shortage (BP26)

Presented by: Preston Ingalls, President & CEO, TBR Strategies

The U.S. is facing a severe shortage of mechanics over the next five years. DOL estimates that for every 10 leaving the workforce through retirement, there will only be five skilled replacements to take their positions. Manpower, the world's largest job placement agency, has identified skilled tradesmen as the Top 10 Most Difficult Jobs to Replace. By the end of this session, attendees will understand the statistics showing the severity of the situation and the impact or consequences, 10 ways to attract people to the profession, and 10 ways to retain the professionals you have.

🔑 Avoiding Critical & Costly Management Law Errors – A HR Attorney's Perspective (BP27)

Presented by: Kay Wolf, Partner, FordHarrison

By attending this presentation, attendees will learn the mistakes made by managers that lead to costly labor and employment law litigation. This seminar is presented as a high-intensity, interactive presentation that provides a common-sense and practical approach to avoiding workplace litigation.

11:30 AM – 12:30 PM

★ Integration – Estimation to Maxwell Solution (ES19)

Learn how to integrate your Estimation job/estimates with Maxwell's software for accounting/project management, ProContractor or Management Suite.

★ Data Content for HVAC (ES20)

Open discussion of current and future data development within the HVAC program. Review new materials and labor units.

★ 🖥️ Estimation Lab: Digital Takeoff Tips and Tricks – Mechanical (LB20)

This hands-on lab helps you use valuable tips and tricks relating to your Mechanical takeoff tools.

Estimation

Session Key

- ★ Beginner
- 🏆 Best Practices
- Ω Intermediate
- 💻 Hands-on Lab
- ◆ Advanced

Breakout Session Planner Grid To best plan and utilize your time at the conference, please use this planner to choose one session per time slot. (You are not required to stay within one product track.)

WEDNESDAY — APRIL 9 (continued)

11:30 AM – 12:30 PM (continued)

🏆 Fast and Accurate Estimating, Budgets, and Job Costing (BP28)

Presented by: Dennis Dixon, President, Dixon Ventures, Inc.

Is Cost Estimating a frustrating component of your bidding procedures? Do you find yourself pricing plans that are not yet completed? Learn tried and true Cost Estimating tips, shortcuts, budgets, and job-costing procedures from a contracting veteran with nearly 30 years' experience so you stay in the profit zone. Learn how to keep the initial "ballpark guesstimate price" from becoming your Contract Price. Compare the pros and cons of Fixed Price vs. Cost Plus bids. Learn new estimating techniques to prepare a Budget, track Actual Job Costing, along with accounting and business methods for Change Orders and Allowances.

🏆 The Gorman Group – Case Study in Best Practices for Fleet Management (BP29)

Presented by: Preston Ingalls, President & CEO, TBR Strategies

The Gorman Group, a New York-based highway paving, and surface repair company that also distributes emulsions for nine New England States, was able to reduce their fleet emergency rate from 35% down to 1.5% while lowering the fleet maintenance costs from 12.1% of FRV down to 2.8% using a process called TPR.

- ★ Beginner
- 🏆 Best Practices
- 🔗 Intermediate
- 🖨 Hands-on Lab
- ◆ Advanced

Breakout Session Planner Grid To best plan and utilize your time at the conference, please use this planner to choose one session per time slot. (You are not required to stay within one product track.)

MONDAY — APRIL 7

11:00 AM – 12:00 PM

◆ Management Financial Analysis for the Large Construction Company (PC01)

This session is a more advanced financial analysis designed for owners of large-size construction companies. Learn how to spot and work the trends and red flags. We will cover the key indicators and how to incorporate ProContractor reporting and tools to enhance the process.

★ Digital Takeoff & Advanced Image Manager (PC02)

Learn Best Practices for using Digital Takeoff in conjunction with the Advanced Image Manager. This session will cover all of the new features in digital takeoff, too.

★ Mobile Connect (PC03)

This session will focus on best practices for those who use or plan to use Mobile Connect for iPad. Learn how you can leverage mobility to capture information where it happens, when it happens, and gain more reliable and timely information capture for the back office.

◆ 🖨 ProContractor Lab: Modifying Reports – Accounting & Project Management (LB02)

In this hands-on lab, we will cover how to use the reporting tools to modify existing ProContractor Accounting reports and forms. We will explore general report layout including the report data views and learn how to add/remove fields, columns, and rows.

🏆 Selling Construction Services (BP01)

Presented by: Steve Boughton, Senior Consultant, FMI

Customers do not like to be sold, but they do like to buy projects that solve their business needs. Explore your expanding role in the “get work” process. Identify the keys to success in positioning your firm over the competition. Understand the role that strategy plays in getting selected. Determine the real decision-making criteria. Find the “hot buttons” and you find the path to selling on value. Discover strategies to keep in touch and build relationships that last. Create the win-strategy that gives you the advantage. Get and keep customers committed.

🏆 Health Care Reform in 2014 and Other Developments in Employee Benefits (BP02)

Presented by: Robert Litvin, Paisner-Litvin LLP

Learn about the latest developments in the various aspects of Health Care Reform (i.e., the Patient Protection and Affordable Care Act) as they pertain to employer health plans.

🏆 25 Ways to Increase Profits – Part 1 (BP03)

Presented by: Leslie Shiner, Owner, The Shiner Group

As a contractor or subcontractor, profits must be based on a process, not accidental. This session focuses on the four key areas of your business to ultimately strengthen your sales, improve your job processes, and increase your profitability. After this fast-paced, action-packed session, participants will leave with a list of 25 ways to implement cost savings measures, efficiency tools, and financial strategies for their companies. Part 1 will focus on strategies related to estimating, sales, and project management.

1:15 PM – 2:15 PM

★ The Power of Grids and Views (PC04)

This session will cover how to use the grids as your primary source for information tracking. This session will share user practices that make this tool one that all members of a company team will be able to use and customize for their needs.

★ Introduction to ProContractor for Earthwork (PC05)

This session will be a high-level overview covering the major features and benefits of utilizing ProContractor for Earthwork.

🔗 Change Management Best Practices (PC06)

This session for project managers and project accounting staff will focus on how to make the Change Management process work for you and your company, including best practices for cost tracking, risk reduction, reporting, and more.

🏆 Organizing For Growth: How to Build a Sustainable Organization for Good Times and Bad (BP04)

Presented by: Steve Boughton, Senior Consultant, FMI

One of the most painful aspects of the recent market downturn has been the trauma experienced by many contractor organizations. Many firms had enjoyed such robust growth during the previous decade that most had never felt the pain of reductions in force, hiring freezes, and cutbacks in professional development that have now become the norm. Now many are questioning if they have the right organizational strategy and resources in place as they prepare to climb out of the “Great Recession.”

🏆 25 Ways to Increase Profits – Part 2 (BP06)

Presented by: Leslie Shiner, Owner, The Shiner Group

As a contractor or subcontractor, profits must be based on a process, not accidental. This session focuses on the four key areas of your business to ultimately strengthen your sales, improve your job processes, and increase your profitability. After this fast-paced, action-packed session, participants will leave with a list of 25 ways to implement cost savings measures, efficiency tools, and financial strategies for their companies. Part 2 will focus on strategies related to financial management, analysis, and strategic management. Prerequisite: It is not required, but highly recommended to you attend Part 1 of this session.

◆ 🖨 ProContractor Lab: Modifying Reports – Estimating (LB04)

This hands-on lab session will focus on modifying existing Estimating reports.

2:30 PM – 3:30 PM

★ Management Financial Analysis for the Small Construction Company (PC07)

This session is designed for business owners and managers of small-size construction companies. Understand the financial statements and flow of financial transactions through this how-to review. Analyze key information for best practice workflow of information and learn how to implement a structured review process.

- ★ Beginner
- 🏆 Best Practices
- 🔗 Intermediate
- 🖨 Hands-on Lab
- ◆ Advanced

Breakout Session Planner Grid To best plan and utilize your time at the conference, please use this planner to choose one session per time slot. (You are not required to stay within one product track.)

MONDAY — APRIL 7 (continued)

2:30 PM – 3:30 PM (continued)

🔗 Introduction to ProContractor for Enterprise Level Assemblies (PC08)

This session will be a high-level overview covering the major features and benefits of utilizing Enterprise Level Assemblies within ProContractor for estimating.

🔗 Project Accounting for Project Managers (PC09)

There's a reason why Project Managers aren't Accountants, and why Accountants aren't Project Managers. This session will attempt to help operations teams understand that what they do using ProContractor affects the accounting team, and how their daily operations can be easier by helping the accountants!

🏆 Who Will Run Your Business When You're Gone? Developing Emerging Managers to Run Your Company (BP07)

Presented by: Steve Boughton, Senior Consultant, FMI

You have worked hard over the years to build a successful company and have worn every hat along the way. You have also hired some very talented people to manage projects and provide other technical expertise, but they do not always have the business acumen to manage the financial, marketing, and human capital elements that are critical to running a complex construction company. Although people need to have a solid foundation of technical knowledge, the most successful managers of the future will also have strong management, leadership, and business skills in order to grow their companies profitably.

🏆 How New Federal Regulations, Pending Legislation and the 2014 Midterm Elections Will Impact the Construction Industry (BP08)

Presented by: Geoff Burr, VP of Federal Affairs, Associated Builders and Contractors

New federal regulations becoming effective this Spring will impact contractor's cost base and compliance needs. This presentation will review these new requirements and also look forward to new rulemakings that could become final this year. Additionally, this discussion will focus on the impact of unwavering congressional gridlock and the prospects for change that are presented by the 2014 elections.

🏆 A Project Manager's Guide to the Financial Stuff (BP09)

Presented by: Leslie Shiner, Owner, The Shiner Group

Contractors understand the business of building, but are often intimidated by building a business. An owner or project manager who understands key financial data and reports will be more likely to generate higher profits, avoid boom-and-bust times, and make better business decisions. Learn how to better understand and utilize basic accounting concepts, especially those specific to the construction industry. Discover how to make more money by understanding the nature of costs.

TUESDAY — APRIL 8

9:45 AM – 10:45 AM

🔗 Material Handling Tips and Tricks (PC10)

Learn the best practice employed by users about process strategies for using the material management module. Explore setup tips and tricks, processing variations, and reconciling.

★ Introduction to ProContractor for Estimating (PC11)

This session will be a high-level overview covering the major features and benefits of utilizing ProContractor for estimating.

🔗 Project Management for Managers and Executives (PC12)

The executive and senior management teams may not need to know how all of ProContractor works, but do need to keep an eye on project progress, profitability, and exposure, all without micro-managing the Project Management or Accounting staff. This session will help improve your use of views, reports, and dashboards to maintain this visibility and control.

🏆 Elements of Cash Flow Management and Getting Paid (BP10)

Presented by: Tyler Pare, Consultant, FMI

Your ability to manage cash flow directly influences your project success. Being aware of these elements, combined with taking action, can lead to project best success. Master the major tasks of analyzing financial statements, tracking cash conversion periods, deciding when and if to borrow, keeping your working capital at adequate levels, and protecting your bonding capacity. After the project is finished, it is time to ask for payment, a time to look at retention and final billing preparation and knowing what your options are.

🏆 Project Building Blocks – The Estimate: Part 1 (BP11)

Presented by: Kirk Alter, Associate Professor in Purdue University's Department of Building Construction Management and president of Fast Management, Inc.

The estimate should be more than just a 'get work' function. It should be the beginning of your plan to build the project profitably. The session focuses on preplanning the estimate so that when you are awarded a project you already have the outline of a successful plan in front of you. Themes include: estimating the project as you plan to build it so that the estimating output you get does not need to be reworked upon award; establishing a labor tracking system with the estimate; and the production of a preliminary schedule as the natural outcome of every estimate.

🏆 Mitigating Risk through Accurate Mobile Field Data Collection (BP12)

Presented by: Mike Merrill, Chief Operating Officer, AboutTime Technologies

With labor being 60% of a construction company's costs, the highest risk in your company comes from not managing your labor effectively. Gone are the days of paper timecards, spreadsheets, and guessing how many man hours were spent on each job and task within a project. Learn how to stay competitive by using newly available "smart" technologies to collect and manage mobile field data.

- ★ Beginner
- 🏆 Best Practices
- 🔗 Intermediate
- 🖨 Hands-on Lab
- ◆ Advanced

Breakout Session Planner Grid To best plan and utilize your time at the conference, please use this planner to choose one session per time slot. (You are not required to stay within one product track.)

TUESDAY — APRIL 8 (continued)

11:00 AM – 12:00 PM

★ Accounts Payable Best Practices (PC13)

This session presents best practices for using the routing and how to manage the workflow. You will also learn about the more in-depth use of the Vendor module, plus ideas for using with intercompany and efficient workflows.

★ Creating and Updating a Successful Estimating Catalog in ProContractor (PC14)

This session will cover how to successfully create and update Catalogs in ProContractor Estimating. Including the importance of WBS Codes.

🏆 Key Performance Indicators that Drive Best Practices (BP13)

Presented by: Tyler Pare, Consultant, FMI

Knowing the score is a very important factor if you are going to win at the game of contracting. But how will you know if you are winning? It's too late to tell if you only gauge success by whether you made or lost money at the end of the job!

🏆 Project Building Blocks – The Estimate: Part 2 (BP14)

Presented by: Kirk Alter, Associate Professor in Purdue University's Department of Building Construction Management and president of Fast Management, Inc.

This is the second part of this session. The estimate should be more than just a 'get work' function. It should be the beginning of your plan to build the project profitably. The session focuses on preplanning the estimate so that when you are awarded a project you already have the outline of a successful plan in front of you. Themes include: estimating the project as you plan to build it so that the estimating output you get does not need to be reworked upon award; establishing a labor tracking system with the estimate; and the production of a preliminary schedule as the natural outcome of every estimate. Pre-requisite: Project Building Blocks – Part 1

🏆 Construction in the Cloud: Full Featured, Anytime, Anywhere (BP15)

Presented by: Reed Clarke, Director of Sales & Marketing, Trapp Online

This session will cover the differences in the various cloud offerings with respect to efficiency, customization, and security. We will review what to look for in cloud technology and making sure that your data is safe and in a redundant system. Attendees will learn about how to get a customized solution for your technology resources and how to use this to improve workflow; How to make sure that your sensitive data is secure and the proper measures are taken to keep it secure, and Efficiency of cloud solutions and how this directly affects the construction industry.

1:15 PM – 2:15 PM

🔗 Payroll-Importing and Workflows (PC16)

This session will cover the user practices of importing time and processing effectively, best reporting workflows, and how to manage payroll as a complete process.

🔗 Work Breakdown Structures (PC17)

Understanding the power and importance of WBS codes in ProContractor Estimating and how they drive the flow of data to ProContractor All-in-One.

🔗 Scheduling & Daily Field Reporting (PC18)

This session for project management and field staff will focus on using the powerful ProContractor Construction Project Management solution's Schedule and various methods of Daily Field Reporting for effective and efficient communication between field and office.

◆🖨 ProContractor Lab: Building Enterprise Level Assemblies (LB12)

This two-hour hands-on lab session will be dedicated to teaching you how to build Enterprise Level Assemblies (ELAs) from scratch.

🏆 Road Map for Marketing Success (BP16)

Presented by: Tyler Pare, Consultant, FMI

In our industry, it is imperative that manufacturers and distributors understand marketing and have a roadmap to effectively implement marketing strategies. To be successful in your marketing efforts you need to have a marketing plan that encompasses your company's strategic initiatives, existing markets, potential new markets, clients, and the responsibilities of key staff. In this session, you will develop a marketing plan, evaluate the marketing process, understand the external opportunities and threats, examine internal strengths and weaknesses, and set company objectives for your plan.

🏆 Integrated Pre-Construction Services (BP17)

Presented by: Kirk Alter, Associate Professor in Purdue University's Department of Building Construction Management and president of Fast Management, Inc.

Revolutionizing your up-front processes for cash and profit. Have you incorporated a state-of-the-art integrated pre-construction approach to your projects? Or do you estimate, then turn-over/kick-off, and buy-out as your process like you always have? It's time to get in the game and offer added-value to your customers.

🏆 Managing Employees in the Payroll System (BP18)

Presented by: Molly Van Kampen, Director of Sales, Greenshades Software

In this session, we will review best practices for entering, reporting and managing new hire and rehire information in the payroll system to help reduce compliance issues and penalties. We will discuss when it is appropriate to use Social Security Number Verification through the SSA versus e-verify through Homeland Security and how the use of these systems can reduce the likelihood of no match penalties for recipient W-2 records, as well as learn about unemployment filing and new hire reporting, as well as the importance.

2:30 PM – 3:30 PM

🔗 Billing: Best Methods for this Key Function (PC19)

This session will cover the best processes to incorporate both project management involvement and accounting process. We will present user workflows and how to get more cross departmental involvement and workflow for the billing function.

- ★ Beginner
- 🔑 Best Practices
- 🔗 Intermediate
- 🖨 Hands-on Lab
- ◆ Advanced

Breakout Session Planner Grid To best plan and utilize your time at the conference, please use this planner to choose one session per time slot. (You are not required to stay within one product track.)

TUESDAY — APRIL 8 (continued)

2:30 PM – 3:30 PM (continued)

🔗 Create Bids & Proposals in ProContractor (PC20)

This session will instruct on the steps necessary to take a completed Estimate and turn it into a Proposal. This session will include creating and utilizing Bid Day instances.

★ Using Views and Logs to Better Navigate ProContractor (PC21)

The construction process can generate a lot of files and records. ProContractor helps keep them all in one place, but you need to know how to navigate for best success. Learn some best practices in using the system Views to help streamline your business practices and about printing reports.

🔑 Estimating for Advantage: Do You Really Know Why You're Bidding This Job? (BP19)

Presented by: David Berry, Consultant, FMI

After a multi-year trend towards negotiated, cooperative procurement of construction services, the pendulum has swung dramatically back to lump sum work. Has your firm lost its edge? Best-in-class contracting organizations are looking at estimating and work acquisition in a completely new way. Are you getting everything you should be from your estimating function?

🔑 Technology for Profit (BP20)

Presented by: Kirk Alter, Associate Professor in Purdue University's Department of Building Construction Management and president of Fast Management, Inc.

What are you doing now? What should you be doing? Planning, estimating, layout, control, reporting, communication, analysis. What apps are you developing to make your company more efficient? How are you using the technology you already have? You see smartphones, iPads, and tablets everywhere – but are they being used to their fullest? What are the apps and accessories needed to make the most of the tools you already have?

🔑 Social Media to Social Business (BP21)

Presented by: Sal Huerta, Vice President, NetPricer.Net

New trends in social media have forced us to look at how we think about and run our businesses. Customers are creating the new digital culture and shifting our business landscapes. Learn why social media is so valuable and how social media is becoming social business.

3:45 PM – 4:45 PM

★ Management Financial Analysis for the Small Construction Company (PC22)

This session is designed for business owners and managers of small-size construction companies. Understand the financial statements and flow of financial transactions through this how-to review. Analyze key information for best practice workflow of information and learn how to implement a structured review process.

3:45 PM – 4:45 PM (continued)

🔗 Alternates and Change Orders in ProContractor Estimating (PC23)

Learn best practices in creating and utilizing Alternates and Change Orders in ProContractor Estimating. This session will also focus on how Change Orders flow from estimating to Project Management and Accounting processes.

🔗 Project Reporting – Progress, Projections, Cost Control, Newly Added Reports, and More (PC24)

Project Managers and project accounting staff will learn some best practices for using the combinations of reports, including many new or modified reports, to get the information needed from projects. This session will not include instruction on modifying your reports, but we will discuss some tweaks that are possible by report modification that can help you.

🔑 How to Avoid Confrontation with Change Orders (BP22)

Presented by: David Berry, Consultant, FMI

Let's face it, change orders are a way of life in construction and unfortunately, so is the conflict that seems to be inherent with trying to convince your customer of the added cost that results from a change in project scope. However, there are ways to avoid that confrontation and still be paid for the additional work that you have done.

🔑 New Markets and New Opportunities (BP23)

Presented by: Kirk Alter, Associate Professor in Purdue University's Department of Building Construction Management and president of Fast Management, Inc.

Markets to be discussed: post-disaster reconstruction, extreme weather events mitigation, shale gas, energy and water for energy, international prefabrication plug and play, water management, food and food processing, mining and extraction, biotechnology and sciences. Where are you on the emerging markets curve? Are you comfortable and safe? Where do you get your market information? How can you stay just ahead of the curve?

🔑 Cost Reduction in Fleet Management – 74 Tips for Getting Costs Down (BP24)

Presented by: Preston Ingalls, President & CEO, TBR Strategies

Cost containment through waste reduction and efficiency improvement is more sustainable than just cost cutting. This session will provide 74 tried and tested means to reduce fleet and facility costs. While some of the techniques will be presented quickly, the more significant ones will be discussed in detail.

- ★ Beginner
- 🔗 Intermediate
- ◆ Advanced
- 🔑 Best Practices
- 💻 Hands-on Lab

Breakout Session Planner Grid To best plan and utilize your time at the conference, please use this planner to choose one session per time slot. (You are not required to stay within one product track.)

WEDNESDAY — APRIL 9

10:15 AM – 11:15 AM

★ The Power of Grids and Views (PC25)

This session will cover how to use the grids as your primary source for information tracking. This session will share user practices that make this tool one that all members of a company team will be able to use and customize for their needs.

🔗 Moving a Won Bid to Project Management (PC26)

This session will focus on the necessary steps to take a bid that has been awarded and create a Project out of it.

🔑 Essential Contract Elements, Wording & Sections to Keep You Out of Court (BP25)

Presented by: Dennis Dixon, President, Dixon Ventures, Inc.

A solid Contract is the foundation for making money and controlling the Client and the Project. Learn essential Contract Sections, Wording, Bullet-Points, and Policies from an experienced contractor and legal expert witness. Simple wording keeps you in control, generates the Project Rules, and reinforces your authority. Learn lessons from three court case examples. Analyze, understand, and discuss the causation and identify solutions to avoid future legal entanglements. Topics covered will be Allowances, Change Orders, Payment Schedules, Specifications, Plan Errors and Omissions, along with your management procedures and policies for the project. Expand your professionalism to understand that a thorough Contract will keep you out of court and maintain a path to profitability. You don't have to be a lawyer to write, edit, and adjust a Contract to fit unique circumstances of any new Project.

🔑 The Declining Mechanic/Technician – Techniques to Address the Shortage (BP26)

Presented by: Preston Ingalls, President & CEO, TBR Strategies

The U.S. is facing a severe shortage of mechanics over the next five years. DOL estimates that for every 10 leaving the workforce through retirement, there will only be five skilled replacements to take their positions. Manpower, the world's largest job placement agency, has identified skilled tradesmen as the Top 10 Most Difficult Jobs to Replace. By the end of this session, attendees will understand the statistics showing the severity of the situation and the impact or consequences, 10 ways to attract people to the profession, and 10 ways to retain the professionals you have.

🔑 Avoiding Critical & Costly Management Law Errors – A HR Attorney's Perspective (BP27)

Presented by: Kay Wolf, Partner, FordHarrison

By attending this presentation, attendees will learn the mistakes made by managers that lead to costly labor and employment law litigation. This seminar is presented as a high-intensity, interactive presentation that provides a common-sense and practical approach to avoiding workplace litigation.

11:30 AM – 12:30 PM

◆ Management Financial Analysis for the Large Construction Company (PC28)

This session is a more advanced financial analysis designed for owners of large-size construction companies. Learn how to spot and work the trends and red flags. We will cover the key indicators and how to incorporate ProContractor reporting and tools to enhance the process.

★ Q&A with Product Management/Development (PC29)

This session will focus on new features coming soon to ProContractor. This will be a session dedicated to the attendees who want to discuss features related to Estimating.

🔑 Fast and Accurate Estimating, Budgets, and Job Costing (BP28)

Presented by: Dennis Dixon, President, Dixon Ventures, Inc.

Is Cost Estimating a frustrating component of your bidding procedures? Do you find yourself pricing plans that are not yet completed? Learn tried and true Cost Estimating tips, shortcuts, budgets, and job-costing procedures from a contracting veteran with nearly 30 years' experience so you stay in the profit zone. Learn how to keep the initial "ballpark guesstimate price" from becoming your Contract Price. Compare the pros and cons of Fixed Price vs. Cost Plus bids. Learn new estimating techniques to prepare a Budget, track Actual Job Costing, along with accounting and business methods for Change Orders and Allowances.

🔑 The Gorman Group – Case Study in Best Practices for Fleet Management (BP29)

Presented by: Preston Ingalls, President & CEO, TBR Strategies

The Gorman Group, a New York-based highway paving, and surface repair company that also distributes emulsions for nine New England States, was able to reduce their fleet emergency rate from 35% down to 1.5% while lowering the fleet maintenance costs from 12.1% of FRV down to 2.8% using a process called TPR.

◆💻 ProContractor Lab: Modifying Reports – Accounting & Project Management (LB19)

In this hands-on lab, we will cover how to use the reporting tools to modify existing ProContractor Accounting reports and forms. We will explore general report layout including the report data views and learn how to add/remove fields, columns, and rows.

- ★ Beginner
- 🏠 Best Practices
- 🔗 Intermediate
- 💻 Hands-on Lab
- ◆ Advanced

Breakout Session Planner Grid To best plan and utilize your time at the conference, please use this planner to choose one session per time slot. (You are not required to stay within one product track.)

MONDAY — APRIL 7

11:00 AM – 12:00 PM

★ Project Management Overview (SS01)

This session is for Owners and Project Managers. Learn more about the high-level key performance information that StreetSmarts can provide so that you can quickly spot trends and manage your construction operations proactively.

🏠 Selling Construction Services (BP01)

Presented by: Steve Boughton, Senior Consultant, FMI

Customers do not like to be sold, but they do like to buy projects that solve their business needs. Explore your expanding role in the “get work” process. Identify the keys to success in positioning your firm over the competition. Understand the role that strategy plays in getting selected. Determine the real decision-making criteria. Find the “hot buttons” and you find the path to selling on value. Discover strategies to keep in touch and build relationships that last. Create the win-strategy that gives you the advantage. Get and keep customers committed.

🏠 Health Care Reform in 2014 and Other Developments in Employee Benefits (BP02)

Presented by: Robert Litvin, Paisner-Litvin LLP

Learn about the latest developments in the various aspects of Health Care Reform (i.e., the Patient Protection and Affordable Care Act) as they pertain to employer health plans.

🏠 25 Ways to Increase Profits – Part 1 (BP03)

Presented by: Leslie Shiner, Owner, The Shiner Group

As a contractor or subcontractor, profits must be based on a process, not accidental. This session focuses on the four key areas of your business to ultimately strengthen your sales, improve your job processes, and increase your profitability. After this fast-paced, action-packed session, participants will leave with a list of 25 ways to implement cost savings measures, efficiency tools, and financial strategies for their companies. Part 1 will focus on strategies related to estimating, sales, and project management.

1:15 PM – 2:15 PM

★ Equipment Management Overview (SS02)

This session is for Owners and Shop Managers. Learn more about the high-level key performance information that StreetSmarts can provide so that you can quickly spot trends and manage your equipment fleet and shop operations proactively.

🏠 Organizing For Growth: How to Build a Sustainable Organization for Good Times and Bad (BP04)

Presented by: Steve Boughton, Senior Consultant, FMI

One of the most painful aspects of the recent market downturn has been the trauma experienced by many contractor organizations. Many firms had enjoyed such robust growth during the previous decade that most had never felt the pain of reductions in force, hiring freezes, and cutbacks in professional development that have now become the norm. Now many are questioning if they have the right organizational strategy and resources in place as they prepare to climb out of the “Great Recession.”

🏠 25 Ways to Increase Profits – Part 2 (BP06)

Presented by: Leslie Shiner, Owner, The Shiner Group

As a contractor or subcontractor, profits must be based on a process, not accidental. This session focuses on the four key areas of your business to ultimately strengthen your sales, improve your job processes, and increase your profitability. After this fast-paced, action-packed session, participants will leave with a list of 25 ways to implement cost savings measures, efficiency tools, and financial strategies for their companies. Part 2 will focus on strategies related to financial management, analysis, and strategic management. Prerequisite: It is not required, but highly recommended to you attend Part 1 of this session.

2:30 PM – 3:30 PM

★ Plant Management Overview (SS03)

This session is for Owners and Plant Managers. Learn more about the high-level key performance information that StreetSmarts can provide so that you can quickly spot trends and manage your manufacturing operations proactively.

🏠 Who Will Run Your Business When You're Gone? Developing Emerging Managers to Run Your Company (BP07)

Presented by: Steve Boughton, Senior Consultant, FMI

You have worked hard over the years to build a successful company and have worn every hat along the way. You have also hired some very talented people to manage projects and provide other technical expertise, but they do not always have the business acumen to manage the financial, marketing, and human capital elements that are critical to running a complex construction company. Although people need to have a solid foundation of technical knowledge, the most successful managers of the future will also have strong management, leadership, and business skills in order to grow their companies profitably.

🏠 How New Federal Regulations, Pending Legislation and the 2014 Midterm Elections Will Impact the Construction Industry (BP08)

Presented by: Geoff Burr, VP of Federal Affairs, Associated Builders and Contractors

New federal regulations becoming effective this Spring will impact contractor's cost base and compliance needs. This presentation will review these new requirements and also look forward to new rulemakings that could become final this year. Additionally, this discussion will focus on the impact of unwavering congressional gridlock and the prospects for change that are presented by the 2014 elections.

🏠 A Project Manager's Guide to the Financial Stuff (BP09)

Presented by: Leslie Shiner, Owner, The Shiner Group

Contractors understand the business of building, but are often intimidated by building a business. An owner or project manager who understands key financial data and reports will be more likely to generate higher profits, avoid boom-and-bust times, and make better business decisions. Learn how to better understand and utilize basic accounting concepts, especially those specific to the construction industry. Discover how to make more money by understanding the nature of costs.

- ★ Beginner
- 🔗 Intermediate
- ◆ Advanced
- 👤 Best Practices
- 💻 Hands-on Lab

Breakout Session Planner Grid To best plan and utilize your time at the conference, please use this planner to choose one session per time slot. (You are not required to stay within one product track.)

TUESDAY — APRIL 8

9:45 AM – 10:45 AM

◆ What Can Jet Reports Do For You? (SS04)

Jet Reports is the StreetSmarts replacement for FRx, but it does much more than financial statements. Learn what this add-in to Excel can do for you. Then attend the hands-on lab to actually test-drive the solution.

👤 Elements of Cash Flow Management and Getting Paid (BP10)

Presented by: Tyler Pare, Consultant, FMI

Your ability to manage cash flow directly influences your project success. Being aware of these elements, combined with taking action, can lead to project best success. Master the major tasks of analyzing financial statements, tracking cash conversion periods, deciding when and if to borrow, keeping your working capital at adequate levels, and protecting your bonding capacity. After the project is finished, it is time to ask for payment, a time to look at retention and final billing preparation and knowing what your options are.

🔗💻 StreetSmarts Lab: Customizing Forms Using StreetSmarts (LB07)

This hands-on lab features adding your logo to your forms, moving fields, changing overall look of forms, and more.

👤 Project Building Blocks – The Estimate: Part 1 (BP11)

Presented by: Kirk Alter, Associate Professor in Purdue University's Department of Building Construction Management and president of Fast Management, Inc.

The estimate should be more than just a 'get work' function. It should be the beginning of your plan to build the project profitably. The session focuses on preplanning the estimate so that when you are awarded a project you already have the outline of a successful plan in front of you. Themes include: estimating the project as you plan to build it so that the estimating output you get does not need to be reworked upon award; establishing a labor tracking system with the estimate; and the production of a preliminary schedule as the natural outcome of every estimate.

👤 Mitigating Risk through Accurate Mobile Field Data Collection (BP12)

Presented by: Mike Merrill, Chief Operating Officer, AboutTime Technologies

With labor being 60% of a construction company's costs, the highest risk in your company comes from not managing your labor effectively. Gone are the days of paper timecards, spreadsheets, and guessing how many man hours were spent on each job and task within a project. Learn how to stay competitive by using newly available "smart" technologies to collect and manage mobile field data.

11:00 AM – 12:00 PM

★ SmartTraxx Speeds Field Data Collection (SS05)

Field data collection is one of the most important topics in heavy construction right now. Learn how SmartTraxx leaves the competition behind in data collection and reporting.

11:00 AM – 12:00 PM (continued)

👤 Key Performance Indicators that Drive Best Practices (BP13)

Presented by: Tyler Pare, Consultant, FMI

Knowing the score is a very important factor if you are going to win at the game of contracting. But how will you know if you are winning? It's too late to tell if you only gauge success by whether you made or lost money at the end of the job!

👤 Project Building Blocks – The Estimate: Part 2 (BP14)

Presented by: Kirk Alter, Associate Professor in Purdue University's Department of Building Construction Management and president of Fast Management, Inc.

This is the second part of this session. The estimate should be more than just a 'get work' function. It should be the beginning of your plan to build the project profitably. The session focuses on preplanning the estimate so that when you are awarded a project you already have the outline of a successful plan in front of you. Themes include: estimating the project as you plan to build it so that the estimating output you get does not need to be reworked upon award; establishing a labor tracking system with the estimate; and the production of a preliminary schedule as the natural outcome of every estimate. Pre-requisite: Project Building Blocks – Part 1

👤 Construction in the Cloud: Full Featured, Anytime, Anywhere (BP15)

Presented by: Reed Clarke, Director of Sales & Marketing, Trapp Online

This session will cover the differences in the various cloud offerings with respect to efficiency, customization, and security. We will review what to look for in cloud technology and making sure that your data is safe and in a redundant system. Attendees will learn about how to get a customized solution for your technology resources and how to use this to improve workflow; How to make sure that your sensitive data is secure and the proper measures are taken to keep it secure, and Efficiency of cloud solutions and how this directly affects the construction industry.

1:15 PM – 2:15 PM

★ Project Management Configuration and Processing (SS06)

This session builds on the ideas presented during the overview session. You will be able to ensure that your modules are correctly configured to provide the key performance indicators that owners want and need. Prerequisite: Project Management Overview

👤 Road Map for Marketing Success (BP16)

Presented by: Tyler Pare, Consultant, FMI

In our industry, it is imperative that manufacturers and distributors understand marketing and have a roadmap to effectively implement marketing strategies. To be successful in your marketing efforts you need to have a marketing plan that encompasses your company's strategic initiatives, existing markets, potential new markets, clients, and the responsibilities of key staff. In this session, you will develop a marketing plan, evaluate the marketing process, understand the external opportunities and threats, examine internal strengths and weaknesses, and set company objectives for your plan.

- ★ Beginner
- 🔗 Intermediate
- ◆ Advanced
- 👤 Best Practices
- 💻 Hands-on Lab

Breakout Session Planner Grid To best plan and utilize your time at the conference, please use this planner to choose one session per time slot. (You are not required to stay within one product track.)

TUESDAY — APRIL 8 (continued)

1:15 PM – 2:15 PM (continued)

👤 Integrated Pre-Construction Services (BP17)

Presented by: Kirk Alter, Associate Professor in Purdue University's Department of Building Construction Management and president of Fast Management, Inc.

Revolutionizing your up-front processes for cash and profit. Have you incorporated a state-of-the-art integrated pre-construction approach to your projects? Or do you estimate, then turn-over/kick-off, and buy-out as your process like you always have? It's time to get in the game and offer added-value to your customers.

👤 Managing Employees in the Payroll System (BP18)

Presented by: Molly Van Kampen, Director of Sales, Greenshades Software

In this session, we will review best practices for entering, reporting and managing new hire and rehire information in the payroll system to help reduce compliance issues and penalties. We will discuss when it is appropriate to use Social Security Number Verification through the SSA versus e-verify through Homeland Security and how the use of these systems can reduce the likelihood of no match penalties for recipient W-2 records, as well as learn about unemployment filing and new hire reporting, as well as the importance.

2:30 PM – 3:30 PM

★ Equipment Management Configuration and Processing (SS07)

This session builds on the ideas presented during the overview session. You will be able to ensure that your modules are correctly configured to provide the key performance indicators that owners want and need. Prerequisite: Equipment Management Overview

👤 Estimating for Advantage: Do You Really Know Why You're Bidding This Job? (BP19)

Presented by: David Berry, Consultant, FMI

After a multi-year trend towards negotiated, cooperative procurement of construction services, the pendulum has swung dramatically back to lump sum work. Has your firm lost its edge? Best-in-class contracting organizations are looking at estimating and work acquisition in a completely new way. Are you getting everything you should be from your estimating function?

👤 Technology for Profit (BP20)

Presented by: Kirk Alter, Associate Professor in Purdue University's Department of Building Construction Management and president of Fast Management, Inc.

What are you doing now? What should you be doing? Planning, estimating, layout, control, reporting, communication, analysis. What apps are you developing to make your company more efficient? How are you using the technology you already have? You see smartphones, iPads, and tablets everywhere – but are they being used to their fullest? What are the apps and accessories needed to make the most of the tools you already have?

2:30 PM – 3:30 PM (continued)

👤 Social Media to Social Business (BP21)

Presented by: Sal Huerta, Vice President, NetPricer.Net

New trends in social media have forced us to look at how we think about and run our businesses. Customers are creating the new digital culture and shifting our business landscapes. Learn why social media is so valuable and how social media is becoming social business.

3:45 PM – 4:45 PM

★ Plant Management Configuration and Processing (SS08)

This session builds on the ideas presented during the overview session. You will be able to ensure that your modules are correctly configured to provide the key performance indicators that owners want and need. Prerequisite: Plant Management Overview

👤 How to Avoid Confrontation with Change Orders (BP22)

Presented by: David Berry, Consultant, FMI

Let's face it, change orders are a way of life in construction and unfortunately, so is the conflict that seems to be inherent with trying to convince your customer of the added cost that results from a change in project scope. However, there are ways to avoid that confrontation and still be paid for the additional work that you have done.

👤 New Markets and New Opportunities (BP23)

Presented by: Kirk Alter, Associate Professor in Purdue University's Department of Building Construction Management and president of Fast Management, Inc.

Markets to be discussed: post-disaster reconstruction, extreme weather events mitigation, shale gas, energy and water for energy, international prefabrication plug and play, water management, food and food processing, mining and extraction, biotechnology and sciences. Where are you on the emerging markets curve? Are you comfortable and safe? Where do you get your market information? How can you stay just ahead of the curve?

👤 Cost Reduction in Fleet Management – 74 Tips for Getting Costs Down (BP24)

Presented by: Preston Ingalls, President & CEO, TBR Strategies

Cost containment through waste reduction and efficiency improvement is more sustainable than just cost cutting. This session will provide 74 tried and tested means to reduce fleet and facility costs. While some of the techniques will be presented quickly, the more significant ones will be discussed in detail.

★ StreetSmarts to V6 Migration (FT09)

This session will provide current users with insight into what it means to migrate their business operations from StreetSmarts to the Viewpoint V6 solution. Discussion will include an overview of key feature/functionality considerations between the products as well as what the sales and implementation processes will look like when it's time to make this move.

- ★ Beginner
- 🔗 Intermediate
- ◆ Advanced
- 👤 Best Practices
- 💻 Hands-on Lab

Breakout Session Planner Grid To best plan and utilize your time at the conference, please use this planner to choose one session per time slot. (You are not required to stay within one product track.)

WEDNESDAY — APRIL 9

10:15 AM – 11:15 AM

◆ Web Reporting Dashboards (SS09)

Learn how to use Web Reporting to quickly provide dashboards and key performance indicators to the executives and senior managers in your company.

★ 💻 StreetSmarts Lab: From SmartTraxx to StreetSmarts (LB17)

This hands-on lab session focuses on the data that can be captured in SmartTraxx, transferring to StreetSmarts. Prerequisite: SmartTraxx breakout session Tips and Tricks for using StreetSmarts.

👤 Essential Contract Elements, Wording & Sections to Keep You Out of Court (BP25)

Presented by: Dennis Dixon, President, Dixon Ventures, Inc.

A solid Contract is the foundation for making money and controlling the Client and the Project. Learn essential Contract Sections, Wording, Bullet-Points, and Policies from an experienced contractor and legal expert witness. Simple wording keeps you in control, generates the Project Rules, and reinforces your authority. Learn lessons from three court case examples. Analyze, understand, and discuss the causation and identify solutions to avoid future legal entanglements. Topics covered will be Allowances, Change Orders, Payment Schedules, Specifications, Plan Errors and Omissions, along with your management procedures and policies for the project. Expand your professionalism to understand that a thorough Contract will keep you out of court and maintain a path to profitability. You don't have to be a lawyer to write, edit, and adjust a Contract to fit unique circumstances of any new Project.

👤 The Declining Mechanic/Technician – Techniques to Address the Shortage (BP26)

Presented by: Preston Ingalls, President & CEO, TBR Strategies

The U.S. is facing a severe shortage of mechanics over the next five years. DOL estimates that for every 10 leaving the workforce through retirement, there will only be five skilled replacements to take their positions. Manpower, the world's largest job placement agency, has identified skilled tradesmen as the Top 10 Most Difficult Jobs to Replace. By the end of this session, attendees will understand the statistics showing the severity of the situation and the impact or consequences, 10 ways to attract people to the profession, and 10 ways to retain the professionals you have.

👤 Avoiding Critical & Costly Management Law Errors – A HR Attorney's Perspective (BP27)

Presented by: Kay Wolf, Partner, FordHarrison

By attending this presentation, attendees will learn the mistakes made by managers that lead to costly labor and employment law litigation. This seminar is presented as a high-intensity, interactive presentation that provides a common-sense and practical approach to avoiding workplace litigation.

11:30 AM – 12:30 PM

★ Release 8.4 Planning Session (SS10)

Participate in the direction of StreetSmarts! Attend this session to lend your input into items to be included and help determine their priority status.

👤 Fast and Accurate Estimating, Budgets, and Job Costing (BP28)

Presented by: Dennis Dixon, President, Dixon Ventures, Inc.

Is Cost Estimating a frustrating component of your bidding procedures? Do you find yourself pricing plans that are not yet completed? Learn tried and true Cost Estimating tips, shortcuts, budgets, and job-costing procedures from a contracting veteran with nearly 30 years' experience so you stay in the profit zone. Learn how to keep the initial "ballpark guesstimate price" from becoming your Contract Price. Compare the pros and cons of Fixed Price vs. Cost Plus bids. Learn new estimating techniques to prepare a Budget, track Actual Job Costing, along with accounting and business methods for Change Orders and Allowances.

👤 The Gorman Group – Case Study in Best Practices for Fleet Management (BP29)

Presented by: Preston Ingalls, President & CEO, TBR Strategies

The Gorman Group, a New York-based highway paving, and surface repair company that also distributes emulsions for nine New England States, was able to reduce their fleet emergency rate from 35% down to 1.5% while lowering the fleet maintenance costs from 12.1% of FRV down to 2.8% using a process called TPR.

Future Transformations

Session Key

- ★ Beginner
- 🏆 Best Practices
- 🔗 Intermediate
- 💻 Hands-on Lab
- ◆ Advanced

Breakout Session Planner Grid To best plan and utilize your time at the conference, please use this planner to choose one session per time slot. (You are not required to stay within one product track.)

MONDAY — APRIL 7

11:00 AM – 12:00 PM

★ Viewpoint V6 Software Introduction for General Contractors (FT01)

Come learn more about Viewpoint V6 Software including Project management, Job costing, Submittals, RFIs and document control through Change Management and Forecasting for General Contractors.

1:15 PM – 2:15 PM

★ Viewpoint V6 Software Introduction for Heavy Highway (FT02)

Come learn more about Viewpoint V6 Software including Project management, Job Costing, Labor, equipment, progress and Production tracking. In addition we will touch on Unit price billing to quantity adjustments, change orders and forecasting for Heavy Highway/Civil.

2:30 PM – 3:30 PM

★ Introduction to ProContractor for Specialty Subcontractors (FT03)

During this session we will provide an overview of the ProContractor by Viewpoint solution for the Specialty Subcontractor. ProContractor by Viewpoint is a contemporary business solution for small to medium sized subcontractors. ProContractor provides the ability to integrate all facets of the organization including Digital Take-off, Earthwork, Estimating, Project Management and Accounting Functions.

TUESDAY — APRIL 8

9:45 AM – 10:45 AM

★ Viewpoint V6 Software Service Management Overview (FT04)

We understand that managing service work and small job work orders is very different than managing large construction projects. The challenge of managing many small work orders and multiple technicians in the field can be a daunting task without the right toolset. Viewpoint's Work Order Management, Service Agreements and Dispatch tools allow for the management of small job, spot service and scheduled maintenance work orders. Managing multiple customers, sites and contracts, flexible pricing, work order scheduling, quick billing and performance tracking are some of the key benefits of this fully integrated product suite. In this session we will showcase the latest release of Viewpoint's Service Management products and provide insight into the future roadmap.

11:00 AM – 12:00 PM

★ Introduction to ProContractor for General Contractors (FT05)

During this session we will provide an overview of the ProContractor by Viewpoint solution for the General Contractor. ProContractor by Viewpoint is a contemporary business solution for small to medium sized General Contractors. ProContractor provides the ability to integrate all facets of the organization including Digital Take-off, Earthwork, Estimating, Project Management and Accounting Functions.

★ Viewpoint For Project Collaboration Overview (FT06)

Every major project relies on a complex network of architects, consultants, project managers, contractors, sub-contractors and suppliers. Drawings, documents, email and contracts need to be shared quickly among all stakeholders, and the most effective way to accomplish that is with Viewpoint For Project Collaboration integrated project collaboration software. Viewpoint For Project Collaboration specializes in collaboration solutions for building, infrastructure and energy.

1:15 PM – 2:15 PM

★ Introduction to ProContractor for Heavy/Civil Contractors (FT07)

During this session we will provide an overview of the ProContractor by Viewpoint solution for the Heavy/Highway contractor. ProContractor by Viewpoint is a contemporary business solution for small to medium sized Heavy/Civil contractors. ProContractor provides the ability to integrate all facets of the organization including Digital Take-off, Earthwork, Estimating, Project Management and Accounting Functions.

2:30 PM – 3:30 PM

★ Viewpoint V6 Software Introduction for Specialty/Service (FT08)

Come learn more about Viewpoint V6 Software including Job Costing, Labor, equipment, Work order, dispatching and agreement management for the specialty service contractor.

3:45 PM – 4:45 PM

★ StreetSmarts to V6 Migration (FT09)

This session will provide current users with insight into what it means to migrate their business operations from StreetSmarts to the Viewpoint V6 solution. Discussion will include an overview of key feature/functionality considerations between the products as well as what the sales and implementation processes will look like when it's time to make this move.

Future Transformations

Session Key

- ★ Beginner
- 🏆 Best Practices
- 🔗 Intermediate
- 💻 Hands-on Lab
- ◆ Advanced

Breakout Session Planner Grid To best plan and utilize your time at the conference, please use this planner to choose one session per time slot. (You are not required to stay within one product track.)

WEDNESDAY — APRIL 9

10:15 AM – 11:15 AM

★ Management Suite to V6 Migration (FT10)

This session will provide current users with insight into what it means to migrate their business operations from Maxwell Management Suite to the Viewpoint V6 solution. Discussion will include an overview of key feature/functionality considerations between the products as well as what the sales and implementation processes will look like when it's time to make this move.

★ Viewpoint For Project Collaboration Overview (FT11)

Every major project relies on a complex network of architects, consultants, project managers, contractors, sub-contractors and suppliers. Drawings, documents, email and contracts need to be shared quickly among all stakeholders, and the most effective way to accomplish that is with Viewpoint For Project Collaboration integrated project collaboration software. Viewpoint for Project Collaboration specializes in collaboration solutions for building, infrastructure and energy.

11:30 AM – 12:30 PM

★ The Essential Executive Dashboard- Running Your Construction Business with True Performance Data (FT12)

From profit margins to change orders and departmental profitability, executives must have access to real time financial and project metrics that enable them to make decisions on the fly that are critical to their company's bottom line. With shrinking margins on projects, the ability to react quickly has become more and more crucial to contractors trying to stay profitable. Attendees will learn how leading contractors are taking advantage of industry leading technologies to keep them informed and one step ahead of the competition.

The Maxwell Zone

Open daily, the Maxwell Zone is a convenient place to learn about Viewpoint solutions, to explore new features and services available, and to meet with our industry partners exhibiting their offerings valuable to construction companies.

Featuring the original Maxwell Systems solutions — ProContractor, American Contractor, Management Suite, StreetSmarts, and Estimation, as well as Viewpoint's V6 and Project Collaboration solutions — the Maxwell Zone is the place to meet one-on-one with technology experts, including support representatives, consultants, executives, product managers, and sales professionals. Having trouble getting a one-on-one consulting appointment? Stop by the Maxwell Zone, we can answer your questions there as well.



Exhibiting companies include*

Maxwell Zone Hours (times subject to change)

Monday, April 7
10:30 AM – 5:00 PM

Tuesday, April 8
7:30 AM – 4:30 PM

Wednesday, April 9
7:30 AM – 9:00 AM

Sponsors



Exhibitors



*Exhibiting companies as of February 27, 2014.

Orlando Hotel and Travel Information



A large colorful talking parrot oversees the Caribe Royale pool area from its perch.

Hotel Information

To take advantage of the special \$139 per night rate (single or double occupancy), please call the hotel directly at 888-258-7501 before Friday, March 14 and mention you are with Maxwell Systems/Viewpoint. Or, click on the link posted on the hotel/travel page of the conference website.

Rooms will be on a first-come, first-served basis. All reservations must be guaranteed with a deposit of first night's room and tax charge. Based on availability, the rate may be extended three (3) days before and three (3) days after the conference. Check with the hotel when making your reservation.

All rates are subject to applicable taxes.

Special Discounts

All conference attendees staying at the Caribe Royale (within group block) are entitled to a 10% discount at The Island Spa. Just mention you are attending the Maxwell Systems Conference when booking.

Arrive early or extend your stay to enjoy the many exciting attractions Orlando has to offer. We have arranged discounted attraction tickets specifically for conference attendees and their families. Disney's "After 2pm," "After 4pm," and Multi-Day Meeting/Convention Tickets are designed to accommodate any agenda and are **not available at the Theme Park ticket windows**. Check out the conference website for more information and to purchase tickets for Disney, SeaWorld, or Universal Studios.

Travel Information

- ✓ **Weather:** Orlando in April is beautiful. Average highs during the day are in the low 80s with temperatures at night dropping into the low 60s.
- ✓ **Attire:** Recommended attire during the Annual Conference is business casual. Typically, meeting rooms are cool, so please plan accordingly.
- ✓ **Airport:** Traveling to Orlando is an easy trip. Orlando International Airport has scheduled Non-Stop service to more major destinations in the U.S. than most other airports. The Caribe Royale is approximately 25 minutes from the Orlando International Airport (MCO).
- ✓ **Ground Transportation:** Taxi cabs and shuttles are located on Level 1 below the baggage claim area. Cost to travel from Orlando International Airport to the Caribe Royale via a taxi is approximately \$50-\$60 each way.

We have arranged a discounted fee using Mears Transportation to/from the hotel at \$32 RT or \$22 one-way per person. Mears Motor Shuttle operates a non-exclusive, shared ride van shuttle from each of the terminals. No reservations are necessary as the shuttle departs throughout the day and evening, every 30 – 40 mins. Tickets can be purchased online ahead of time or at a Mears booth conveniently located at the airport. For more information, please visit the Hotel/Travel page of the conference website at www.maxwellsystems.com/event.



Caribe Royale
8101 World Center Drive
Orlando FL 32821



TRANSFORM

BEST PRACTICES FOR POWERING PROFITABLE GROWTH

Registration includes: Access to all sessions, conference materials, food and beverage during conference events, all networking events, and the Maxwell Zone (exhibit hall). Please complete one registration form per attendee and fax to **1-215-392-3135** or register online at www.maxwellsystems.com/event

Company Name _____ Attendee's First and Last Name _____

Title _____ Email _____

Street Address _____

City _____ State _____ Zip _____

Work Phone _____ Fax _____

Special Needs (Please list any food allergies, dietary restrictions, or physical limitations) _____

In case of emergency, please contact: _____

First Name, Last Name

Phone

Relationship

Industry: Select the industry that best represents your company. (Please select one)

- ☐ Commercial Building
 ☐ Concrete/Masonry
 ☐ Electrical
 ☐ Excavation/Grading
 ☐ General Contractor
 ☐ Heavy Construction
☐ Highway
 ☐ HVAC
 ☐ Mechanical
 ☐ Plumbing
 ☐ Residential Building
 ☐ Roofing/Siding
☐ Sheet Metal
 ☐ Specialty
 ☐ Utilities
 ☐ Other _____

Role in Company: (Please select one)

- ☐ AP Manager
 ☐ AR Manager
 ☐ CEO
 ☐ CFO
 ☐ COO
 ☐ Estimator
 ☐ Finance Manager
☐ General Manager
 ☐ IT Manager
 ☐ Office Manager
 ☐ Owner
 ☐ President
 ☐ Project Manager
☐ Sales Manager
 ☐ Vice President
 ☐ Other _____

Which product(s) does your company currently use? (Please select all that apply)

- ☐ American Contractor
 ☐ Estimation
 ☐ Management Suite
 ☐ ProContractor
 ☐ StreetSmarts

Please indicate the breakout sessions/lab you are interested in attending by filling in the appropriate session code into the boxes below.

(One code for each session time slot. **One Lab per person.** Registration for additional Labs will be done on-site at the conference.)

MONDAY

11:00 AM – 12:00 PM

1:15 PM – 2:15 PM

2:30 PM – 3:30 PM

TUESDAY

9:45 AM – 10:45 AM

11:00 AM – 12:00 PM

1:15 PM – 2:15 PM

2:30 PM – 3:30 PM

3:45 PM – 4:45 PM

WEDNESDAY

10:15 AM – 11:15 AM

11:30 AM – 12:30 PM

Event Registration Pricing

- ☐ Early Bird Special \$895 (register by January 17th)
☐ Standard Rate \$1095 (register after January 17th) \$ _____
☐ Early Bird Team discount rate \$795/pp
 (register 4 or more attendees from same company by January 17th*)
☐ Standard Team discount rate \$995/pp \$ _____
 (register 4 or more attendees from same company after January 17th*)
☐ Guest Fee \$100/pp (For Social Event Only) \$ _____

Payment Fees

Event Registration Total \$ _____
 Promo Code

--

 Guest Ticket(s) \$ _____
 Total Due \$ _____

Payment Information

☐ Enclosed is my check made payable to Maxwell Systems, Inc.
☐ Please use the following credit card: (Circle One) **Visa AmEx MC**
 Credit Card Number _____
 Expiration Date _____ Security Code _____
 Name of Cardholder _____
 Billing Address _____
 City _____ State _____ Zip _____
 Signature _____

Fees and Cancellation Policy: Conference fee includes conference receptions, materials, continental breakfasts, lunches, breaks, and sessions. If you choose to pay by check, you must submit payment within 30 days of your registration. If not, your registration will be cancelled. If a written cancellation request is received by March 21, 2014, the total registration fee will be refunded. No refunds will be made for cancellations after this date. You may substitute another person from your organization at any time, without penalty. Please inform Maxwell Systems in writing of the named substitute. 1000 First Avenue, Suite 200, King of Prussia, PA 19406 Attn: Events Manager

*Offer cannot be used in conjunction with any other offer.

If you have spoken to a Maxwell Systems representative about the conference, please enter his/her full name here _____

VIEWPOINT®

See you in Orlando!

