



AMERICAN COUNCIL OF ENGINEERING COMPANIES

Business of Design Consulting Virtual Program Schedule

Module 1: Managing to Succeed in a Challenging Business Environment

Presented by Steve Walker, SR, Walker & Associates

Learning Objectives

1. Navigating the Leadership Path
2. Establishing a personal vision
3. Understanding Strategic Planning and Your Firm

Session Content:

- Pre-Recorded Presentations: The Leadership Path and Essential Management Skills (30-minutes each)
- Live Discussion: Tuesday, October 14, 2025 at 1:30-4:00pm Eastern

Module 2: Transitioning from Project Management to Leadership

Presented by Jeremy Clarke, COO | Managing Director, Zweig Group

Learning Objectives

1. Redefine Relationships in Leadership
2. Drive High Performance
3. Balance Empathy and Economics
4. Transition Mindset from PM to Leader
5. Apply Best Practices from across the industry

Session Content:

- Pre-Recorded Presentations: Adopting a Business Mindset
- Live Discussion: Tuesday, October 21, 2025 at 1:30-4:00pm Eastern

Module 3: Financials

Presented by Matt Fultz, Director, Matheson Financial Advisors, Inc.

Learning Objectives

1. Driving value in a volatile market

2. Long-term financial and valuation results: setting the stage
3. Accounting principles and practical financial tools

Session Content

- Pre-Recorded Presentation: Accounting 101 (30-minutes)
- Live Discussion: Tuesday, October 28, 2025 at 1:30-4:00pm Eastern

Module 4: Business Management and Ownership Transition

Presented by Matt Fultz, Director, Matheson Financial Advisors, Inc.

Learning Objectives

1. Financial exit strategies
2. Retirement Planning: Internal ownership transition issues, internal buy-outs, stock plans,
3. ESOPs
4. The "ins and outs" of mergers and acquisitions in the recovery decade

Session Content

- Live Discussion: Wednesday, November 5, 2025 at 1:30-4:00pm Eastern

Module 5: Maximizing Your Business Development ROI

Presented by Rich Friedman, Friedman & Partners

Learning Objectives and Session Description:

Many engineering firm professionals are overwhelmed at the thought of having to conduct business development on top of project responsibilities, staff mentoring and other key functions. In this interactive workshop, participants will learn which business development strategies and tactics yield the biggest "bang for the buck" so that the time one invests in business development will have the biggest payoff. Through industry anecdotes, lessons learned, and case studies, we address these topics and others:

1. The distinction between marketing and business development and how they work in synergy
2. Debunking pervasive business development myths
3. Greatest business development challenges and strategies for overcoming them
4. The vital role of asking probing questions and engaging in active listening
5. Strategies for strengthening relationships with existing clients and probing for unmet needs
6. Strategies for targeting prospective clients and closing the sale

Session Content

- Pre-Recorded Presentation: Maximizing Your Business Development & Marketing ROI (60-minutes)
- Live Discussion: Tuesday, November 11, 2025 at 1:30-4:00pm Eastern

Module 6: Contracts and Risk Management

Presented by Brett Stewart and Michaela Kendall, Design Professional Risk Manager, AXA/XL

Learning Objectives

1. How good is your risk management crystal ball?
2. Key risk factors that determine project success or failure
3. Contracts do's and don'ts
4. Communication and documentation – a two-edged sword

Session Content

- Pre-Recorded Presentation: Contracts and Risk Management (60-minutes)
- Live Discussion: Tuesday, November 18, 2025 at 1:30-4:00pm Eastern

Module 7: Reflection and Close-out

Learning Objectives

1. Individual check-outs
2. Review program principles

Session Content

- Live Discussion: Tuesday, November 25, 2025 at 1:30-3:00pm Eastern
- Program Evaluation Form