



JOB & COMPANY OPERATIONS (JCO)

FOR CONSTRUCTION
Kathryn Crosby



Mechanical Contractors Association of America, Inc.

1385 Piccard Drive Rockville MD 20850 T 301 869 5800 F 301 990 9690 MCAA.ORG

LEADERSHIP DEVELOPMENT SERIES (LDS)

Every member of your field and office leadership team will benefit from the JCO seminars. Developing highly trained and skilled people with good operational practices and solid procedures will lead to less problem prone projects, reduced duplication of effort, and allow your company to measure tangible results.

JCO 100: 32 Hours In-Person | 8 - 3 Hour Virtual Sessions

Introduction to Project Management

Acquiring and executing profitable projects is the purpose of any construction company yet many employees of the company do not understand the important part they play in the project or how they can assist in the overall project process. Using the MCAA's Successful Project Management Flowchart and a sample project as guides and examples, participants will see all that is happening within the phases of a project life cycle from acquisition to close-out. This course is designed for new project managers or assistants and administrative personnel who assist the project team, but anyone working for the company will benefit from knowing how projects are acquired, executed and closed out.

JCO 101: 8 Hours In-Person | 2 - 2 Hour Virtual Sessions

Successful Business Communications—It Begins at the Beginning

Virginia Satir said, "Once a human being has arrived on this earth, communication is the largest single factor determining what kinds of relationships he makes with others and what happens to him in the world about him." During this course, attendees will learn the critical role various forms of communication play in relationships, and in the image and success of individuals, projects and the company. Clear and concise communication can reduce the chance of misunderstandings and conflict. Participants will do an assessment of their personal communication style so they can manage it, develop a communication system for their area of responsibility, draft and present to the class a self-introduction, have a discussion on the impact all forms of communication have on the company's image, how to vary communication style and methods for the receiver, and the art of listening to increase understanding. The course also provides tips on how to keep communication clear and easy to navigate for the receiver, no matter what method is chosen, email layout and format, choosing a subject line that is compelling, and the "Rule of Ones."

JCO 102: 8 Hours In-Person | 2 - 2 Hour Virtual Sessions

Construction—A People Business

People and personnel issues are by far the most difficult things you deal with in your business every day. In this session, you will discover your natural styles for managing conflict, behavior, and handling difficult people. Through exercises, discussion, and workshops, you will learn how to identify and deal with others in the most efficient and effective way.

JCO 103: 8 Hours In-Person | 2 - 2 Hour Virtual Sessions

Contract Language—What You Don't Know Can Hurt You

This seminar is a "street view" of construction contract language from the perspective of a former contractor. Topics include: what contracts are for, explicit and implicit language, the

dirty dozen—what they mean and how to modify them, what standard subcontracts say, and the project manager/foreman partnership's role in protecting the company. Participants are encouraged to bring contracts to discuss.

Note: the presenter is not an attorney. The information presented is for educational purposes only and not legal advice.

JCO 104: 4 Hours In-Person | 2 Hour Virtual Session

Dealing with Difficult People at Work

Working with difficult people can be difficult. Knowing how to work with difficult people is not a skill that comes naturally. However, as there is no escape from difficult people, there is a way to lessen the pain. Participants will learn to identify and deal with many difficult personalities in the workplace, as well as the art of productive confrontation, how to resist intimidation, how to make a disruptive employee productive, and finally how to meet the needs of your superiors, peers, and subordinates.

JCO 105: 8 Hours In-Person | 2 - 2 Hour Virtual Sessions

The Art of Being an Effective Manager

Being an effective manager means far more than directing the resources needed to accomplish a task. Participants will learn eight essential elements for being an effective manager:

- Integrity—first, last and always
- Leading the charge—elements of successful leadership
- What they see is what they get—projecting an image
- Words—the art of communication
- Human capital—your most valuable asset
- Performance—manage what you measure
- Motivation—what moves and inspires people?
- Coaching—develop a game plan, align the troops, and get out of the way

JCO 106: 8 Hours In-Person | 2 - 2 Hour Virtual Sessions

Written Communication Skills

Topics covered in this course include::

- Who, what, when, where, why and how of good communication
- Special "rules" about electronic correspondence
- Guidelines for effective project correspondence

JCO 107: 1 Hours In-Person | 90 Min. Virtual Session

Managing Your Cash Flow

Managing cash is more important than ever. Participants will learn what cash flow is and is not, how some companies treat extension of credit as an afterthought and actually train their slow payers, and strategies to establish and administer a credit policy. Also discussed will be monitoring the cash-hungry items that add no significant value to the company, managing overhead, and tools to measure effective management of cash.



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JCO 108: 4 Hours In-Person | 2 Hour Virtual Session

Control Your Life by Controlling Your Time

For most people, time gets away from them. They feel constantly behind. Many books and publications are written on the subject of time management, yet time cannot be managed, as it cannot be increased or decreased and is the same for everyone.

By creating lists that are too long, we set ourselves up for disappointment. This session will cover many tips and tricks for managing yourself in relation to time including how much of your time to schedule, time robbers, and how your baseline behavior characteristics govern how you utilize and see time.

JCO 109: 4 Hours In-Person | 2 Hour Virtual Session

Understanding and Resolving Conflict

Conflict is a given. It occurs daily to every person on the planet. However, understanding when and why conflict occurs will help participants lose their fear of conflict and teach them how to solve it. Through lecture and role play, this session will:

- Identify and understand your conflict management style
- Learn conflict management strategies and the appropriate use of each strategy
- Identify the most important qualities one can develop when managing conflict

JCO 110: 4 Hours In-Person | 2 Hour Virtual Session

Interpersonal Skills of the Project Team

People skills are usually the most sought after and least developed skill. Being able to communicate with, get along with, and work with people is essential to the success of a project or company. Often, people are forced to work together without taking time to get to know each other. This course explores:

- Assessing and using your natural behavior style to your advantage
- Learning to assess others' behavior style
- Dealing with people who are not like you
- Developing effective teams

JCO 111: 4 Hours In-Person | 2 Hour Virtual Session

The Business of Contracting: Back to the Basics

Many construction company owners and managers believe that if they manage their construction projects, the company will run itself. Nothing is further from the truth. Running the projects and managing the business require two completely different skill sets. Owners and managers must work in the business as well as on the business. To remain competitive and profitable, companies must examine and make every facet of their company as efficient as it can be. Participants will learn the fundamentals of managing the business. Through discussion, exercises and examples, participants will be given tools to assist them with the business end of the business.

JCO 112: 4 Hours In-Person | 2 Hour Virtual Session

Basic Business Writing for Foremen and Service Technicians

This course covers basic writing skills in items that a foreman would have to produce, such as daily reports and progress reports, the proper way to communicate electronically, and the importance of good job documentation.

JCO 113: 8 Hours In-Person | 2 - 2 Hour Virtual Sessions

Managing Project Risk with Solid Documentation

Now more than ever contractors must pay close attention to the written records they keep on construction projects. Solid project documentation is a company's best defense against problems that occur. This all-day seminar will cover important documentation topics including, but not limited to, contract language, submittals and RFIs, close-out, scheduling and schedule delays, tracking and managing owner furnished equipment, notification requirements, change orders, and jobsite organization. Attendees will learn their unique role in protecting the company against damage, claims, and unnecessary costs.

JCO 114: 4 Hours In-Person | 2 Hour Virtual Session

Financial Statements—What You Always Wanted to Know but Were Afraid to Ask

Financial statements are frequently the most underutilized and misunderstood part of a construction business, yet they are one of the most valuable tools company owners and management can use to analyze and make decisions about their company. With examples and interactive exercises, participants will learn the fundamentals of construction accounting, including the terminology, how to read financial statements, what reporting methods are commonly used for tracking company finances, and the pros and cons of each.

JCO 115: 4 Hours In-Person | 2 Hour Virtual Session

Construction Financial Management—It's More than Accounting

Many construction company owners believe that accounting and financial management are the same. This seminar will explore the differences, explain why companies must have both, and show how a company can use financial statements to measure, benchmark, and forecast. Participants will learn the language of "financial ratios" and will understand how to use them.

JCO 116: 4 Hours In-Person | 2 Hour Virtual Session

General Conditions of the Contract

Kathryn Crosby notes, "Most field personnel are not given proper instruction and information by their employers for their rights and obligations to the contract's General Conditions." As the contractor's primary field representative, the foreman must understand how the company is obligated to perform as a condition of the contract. This session will familiarize foremen with critical, specific terms and standard contract conditions. Industry standards for subcontract agreements and general conditions will be discussed and reviewed. Among the topics to be explored are: contract documents, getting jobs, "rules of the road", scope, schedule, payment terms, flow-down clauses,



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changes in the work, terminating contracts, delays, disputes, temporary facilities, site safety requirements, notification requirements, warranty procedures, and project bonding requirements.

JCO 117: 4 Hours In-Person | 2 - 90 Min. Virtual Sessions

Knowing the Score – Understanding the Impact of Project Forecasting

Many MCAA contractors do not understand the serious implications of failing to monitor and forecast projects monthly. Companies that do not produce project status reports and work-in-progress reports could be receiving erroneous financial information and are making ill-advised business decisions based on that information. Better financial planning enables project staffs to maintain and run more profitable, less problem-prone projects. Some of the topics to be explored are:

- How are monthly project status reports and work-in-progress reports produced?
- How should these reports be interpreted, and what do they mean to the company?
- What are over- and under-billings and why is it critical to book them monthly?
- How do financial statements work and what do they mean?
- What do surety companies look for?

JCO 118: 4 Hours In-Person | 2 Hour Virtual Session

The Profitability of Safety

Effective safety programs can significantly reduce costs. The hidden costs of accidents, what your company's Experience Modification Rate (EMR) means, the costs of a high EMR, the need for a relationship with medical care providers, the importance of a light duty program, and how to start a safety program are explored.

JCO 119: 4 Hours In-Person | 2 Hour Virtual Session

Safety—the Foreman's Critical Role

Being an effective manager means far more than directing the resources needed to accomplish a task. Participants will learn

- Introduce and explain basic loss control concepts
- Explore how the foreman's behavior and attitude effect safety
- Reinforce the foreman's moral and personal obligations towards safety
- Describe how safety planning can be easily integrated into project planning

JCO 120: 8 Hours In-Person | 2 - 4 Hour Virtual Sessions

Knowing the Craft is Not Enough

This course is designed for new company owners that have come from the field. It explores those skills needed to run a business, which are different from the skills needed to run a project. Topics covered include the course of events from apprenticeship to business owner, surrounding yourself with brilliant people, your dashboard for success, and procedures you will need to implement.

JCO 121: 4 Hours In-Person | 2 Hour Virtual Session

The Successful Entrepreneur

This course is designed for business owners. It explores the risks and potential rewards of being a business owner, the traits needed for success, planning an exit strategy, how to value the company, and the three phrases a company goes through as time goes on.

JCO 122: 4 Hours In-Person | 2 Hour Virtual Session

Re-Energize Your Workforce

All businesses have been rocked by economic upheaval. Companies have been driven to cut costs at every turn and most some have made significant personnel cuts. Those employees who have managed to survive should be happy, yet they feel overworked, apprehensive, and unappreciated. In this course, participants will hear why the survivors must be your most important priority and will learn what can be done immediately and economically to begin a company-specific "Employee Stimulus Program".

JCO 123: 8 Hours In-Person | 2 - 2 Hour Virtual Sessions

Construction Finance Fundamentals - What your accountant wants you to know

As a new project manager, do you wonder how your projects impact overall company finances? If you do, or want to know more about construction company finances, this session is for you! Included in this informative and open-discussion training:

- Overview of the Income Statement and Balance Sheet
- Understanding the impact of project forecasting
- Accounting for overhead an indirect costs in your projects and change order proposals
- Why and how payment schedules and payment terms impact company cash flow
- Strategies for setting up a billing breakdown or schedule of values
- Understanding the billing schedules for your projects
- How to set up the job cost breakdown for easier forecasting and measuring costs against the estimate
- Managing the unapproved change order process

JCO 124: 8 Hours In-Person | 2 - 2 Hour Virtual Sessions

Navigating the Numbers – Business Finance for Mechanical Service Professionals

It seems like everyone in the company is constantly talking about money and company finances. Billings, revenue, collections, profit, overhead, service calls, new customers, maintenance agreements, and perhaps cash. You may be wondering what it all means but are hesitant to ask. During this open discussion session, you will learn:

- How do service companies measure financial health?
- Why prompt billings and collections are critical to financial health
- What does inventory do to the bottom line?
- How do we know if we are making money on a service call?
- Why maintenance agreements are the backbone to any service company
- Identifying and eliminating profit killers



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**About the Instructor:****Kathryn Crosby**

Kathryn Crosby has more than 30 years experience in the construction business. While serving as Vice President and CFO for a mechanical contractor she was elected to the MCAA Board of Directors, nominated as chair for MCAA's Project Management Education Committee, was active in the

AGC, and served on the faculty of the MCAA's highly acclaimed Institute for Project Management (IPM). Today, as owner and founder of C2 Consulting, Inc, Kathryn continues her dedication and love for the construction industry doing seminars and training throughout the U.S. and Canada. She currently serves on the faculty of IPM, Construction Education Institute, MCAA's National Education Initiative (NEI) and the UA's Instructor Training Program. Kathryn has developed custom training programs for several trade organization and construction companies including the UA and Asbestos Workers.

Contact Information:

Contact Kathy at **801-550-8553** or kcrosby@c-2consulting.com.

About the National Education Initiative (NEI):

MCAA will bring lifelong learning directly to you! The National Education Initiative Seminars are our best MCAA/MSCA programs—brought to your local association or even your company. Our goal is to provide ongoing and advanced education and training in support of individual and association growth across the mechanical contracting industry. We offer standard and custom-designed classes exclusively for your association or company's unique needs and challenges. If you need training quickly or have a large group, we are here to help!

For more information or to schedule a course:

Contact **Priya Nirmal** at **301-869-5800** or pnirmal@mcaa.org.



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