

BUSINESS ESSENTIALS for PROFITABILITY Workshop



Get your company to profitability faster with proven business methods. This workshop teaches you the secrets no one tells you about running a successful installation business. Materials and exercises empower you with specific action items to implement immediately. Get the results you deserve—time and money!

LEARN HOW TO:

- Set up the office and manage paperwork flow
- Establish support for running a company
- Outline a business plan and understand what goes in it
- Establish the flow of a project
- Identify tasks, assign responsibilities, and establish accountability
- Identify and document procedures for sales, administration, and operations
- Develop a marketing plan and message
- Create sales, close them, and manage the sales process
- Maintain accurate and meaningful accounting
- Lead your team effectively with proven techniques

WORKSHOP FEATURES AND MATERIALS

This workshop is designed by an industry veteran and business expert, with over 20 years of business ownership experience. This intensive and interactive workshop is led by an experienced Bedrock Learning trainer and subject matter expert. Each student receives the following materials:

- Comprehensive workbook in full-color, plus numerous handouts
- *Residential Technologies Standardized Forms CD* - \$199 retail price
- Certificate of Completion
- CEU Credits: 4.5 for CEDIA and .7 for NBFPA
- Substantial savings on Bedrock Learning business support tools including planning symbols, project management materials and sales tools

WHO SHOULD ATTEND

This workshop is for business owners and managers who want to establish or fine tune their residential installation company's organization, processes and procedures, save time, and increase profits.

PREREQUISITES AND COST

- No previous business management experience is required
- An understanding of the industry is recommended
 - This knowledge can be gained by taking the *online course Introduction to Residential Technologies*, discount available when registering for this workshop
- Cost, including all materials and lunch, is \$599 per person
- Each additional student from the same company is \$399

DATES, LOCATION AND REGISTRATION

- For a complete schedule of workshops, visit www.bedrocklearning.com
- Register by phone at 616.335.6206

For more information:

BEDROCK
Learning.com

email workshops@bedrocklearning.com
phone 616.335.6206

Workshop Outline

1. Overview of a Typical Installation, from Sale to Completion
2. Strategic Business Thinking
 - Offerings and market segment focus
 - Your company profile
3. Organizing To Do Business
 - Business Start-up
 - Business operations
 - Location
 - Professional support
4. Setting Up the Office
 - Physical Layout and Equipment
 - Personnel and Responsibilities
 - Office Paperwork Organization
 - Accounting System
 - Proposal Development
 - Basic Procedures
5. The Business Plan
 - What, Why, and How
 - Components of a Business Plan
6. Processes, Procedures, and Systems
 - Marketing and Sales
 - Project Management
 - Accounting
 - Process flow charts
 - Documented procedures
 - Forms and paperwork
 - Increasing Productivity, Efficiency and Profitability
7. Marketing Management
 - Marketing strategy
 - The 4 P's
 - Marketing Collateral
 - Advertising and Promotion Plan
 - Sales Portfolio
8. Sales Management
 - Leads Generation and Tracking
 - Sales Presentations and Proposals
 - Closing the Sale and Turning It Over
 - Sales targets and ROI
 - Revenues and Gross Margins
9. Project Management
 - Project Management Process
 - Industry Best practices
 - Setup, Planning and Execution
 - Control and Measures of Success
 - Project Management Tips
10. Accounting and Financial Management
 - Processes and procedures
 - Inventory Control and Job Costing
 - Chart of Accounts and Key Reports
 - Income Statement and Balance Sheet
11. Leading Employees Effectively
 - Division of Labor - Org Chart
 - Responsibilities and Job Descriptions
 - Leadership
 - Employee Documentation
 - Motivation and Incentives
12. Tying it All Together
 - Integrating the Processes
 - Measuring Success