

Business DEVELOPMENT Sessions



JOIN US FOR SMACNA BUSINESS DEVELOPMENT SESSIONS • GROW YOUR KNOWLEDGE BASE TODAY 7 ••

Mentoring and Coaching—A Guide to Growing Managers in Your Company

(A New Horizons Foundation Project)

Presenter: **Jake Appelman**, Staff Consultant
Fails Management Institute (FMI)

This newest project will cover all the reasons for and benefits of developing mentoring and coaching programs. Jake Appelman will describe the various mentoring and coaching approaches, including formal and informal programs, group approaches, cadre coaching and other approaches used within the industry. Results of the research on the process for identifying candidates, matching candidates with mentors/coaches, frequency of contact and other key components of the process will be discussed.



Jake Appelman is a staff consultant with Fails Management Institute. As a member of the Leadership and Organizational Development Group, Jake is committed to transforming the worldwide construction industry by building exceptional leaders one at a time. His passion is helping leaders realize their full potential through increased self-knowledge. His primary focus is on designing and delivering customized solutions to help organizations reach strategic goals.

Successful Exit Strategies

(A New Horizons Foundation Project)

Presenter: **Stuart Phoenix**, Principal, Investment
Banking, Fails Management Institute (FMI)

This important project describes the various equity transfer planning alternatives included, but not restricted to, employee buyouts, third-party sales to a strategic or financial (private equity) buyer, ESOPs, public offering and other available options. It will examine the different methods for determining the value of the enterprise including market-based, asset-based and earnings-based approaches. There will be a review of past market experience with roll-ups, consolidation and other related activities and trends for the industry with an emphasis on the HVAC and sheet metal industry and review of the "pitfalls to avoid."



Stuart Phoenix is a principal in FMI's Investment Banking practice. He helps buyers find appropriate acquisition candidates and assists sellers in their search for buyers. He works with his clients to develop and implement strategies, select target criteria, locate and screen prospects, negotiate price and terms, and structure transactions.

Embezzlement, Fraud and Identity Theft: How It Happens and How to Avoid It!

Presenter: **Edward J. McMillan**, CPA, CAE

It's unfortunate, but the reality is that you only "think" your employees are honest but anyone can be the victim of identity theft. This fascinating session, both humorous and practical, will walk you through scenarios on actual fraud, discuss what was on the mind of the perpetrators, how they were discovered and what could have been done to prevent it. An in-depth questionnaire designed to help you gauge the adequacy of your own internal controls and vulnerability to identify theft will be reviewed and discussed in detail. There will be a discussion of what steps you should take if you should unfortunately find yourself the victim.

Ed McMillan is an expert and a national authority on fraud prevention. He has developed a national reputation for fraud investigation and has authored two bestselling books on the subject.

[Continued on page 8]

Business DEVELOPMENT Sessions [cont]



•• 8 ATTEND THE SMACNA BUSINESS DEVELOPMENT SESSIONS

Design to Fabrication – Utilizing BIM to Maximize Overall Efficiency

There has been increasing attention given to BIM (Building Information Modeling) in recent years and owners are starting to not only expect, but also demand that it is used on their projects. There will be illustrations through various practical project examples how project teams, when their interests have been strategically aligned, have been able to streamline their work processes from design to completed fabrication and realize the opportunities of using 3D-enabled delivery to reduce risk, eliminate redundant work, and maximize overall project efficiency. Case examples from health care, industrial and governmental projects will be presented and discussed.

The “Whys” and “What Fors” of Geothermal Applications

Presenter: **John Suzukida**, *President*, GeoSystems, LLC

This session will provide information on why customers are choosing to buy and install various types of geothermal systems such as vertical wells, horizontal boring, open loop, lake/ponds and horizontal trenches. In addition to providing the details of each application, the presenter will cover what makes good (and bad) installations, what should be avoided (do’s and don’ts), and where the market for geothermal systems is going.

John Suzukida is currently president of GeoSystems, a geothermal heat pump manufacturer. Prior to this position he founded Lanex Consulting in 2002. He has worked with the West Coast Zero Net Energy Coordinating Council, California Commissioning Collaborative Advisory Council, and the National Conference on Building Commissioning. John has a BS degree in Mechanical Engineering from the University of Illinois and is a registered professional engineer in the state of Wisconsin.



The Recession Revisited—An Update

Presenter: **Thomas C. Schleifer**, *Ph.D.*

Most will remember Dr. Thomas C. Schleifer’s warning at our convention last year, about exactly what has happened to our economy. Dr. Schleifer will update his projections; explain the significance of what has occurred since our last annual meeting; and define current economic and industry developments in terms that are easy to understand and specifically directed to our industry. *This is new information!*

Dr. Schleifer will define and classify market cycles and explain the difference between this and prior cycles which he says we have not seen since the great depression. He will forecast the length of the market slow down and its impact on our industry including unprecedented aggressive pricing, changes in owner attitudes, evolving delivery methods and declining margins.



Business University and Graduate Program Reunion

Presenter: **Thomas C. Schleifer, Ph.D.**

SMACNA members from SMACNA's Business Management University and Graduate Programs are invited to attend this reunion session to reconnect with friends from prior years' programs.



Dr. Schleifer will present his observations on the "State of the Industry" and current market conditions. He will discuss the resulting impact on SMACNA member companies, including operations, production, financial, and morale. Dr. Schleifer will share his projections for the future and the changes to anticipate as the industry adjusts to marketplace realities.

Electrical Safety and Fall Protection – Two Important Safety Issues for the Sheet Metal Industry

Presenter: **Vincent R. Miller, Jr., President,** Miller Safety Consultants

This session will cover understanding and implementing regulations and standards in electrical safety including NFPA 70E and fall protection requirements such as aerial lifts, roof work, and scaffolds.

As the owner and president of Miller Safety Consultants, Ltd., Vince Miller provides safety and health training and consulting services to clients in North America and Canada specializing in areas of electrical safety, fall protection, and specialty equipment for employee protection. He is a Certified Safety Professional with over 30 years of safety experience.

The Top 85+ Things That Can Ruin a Chapter Executive's Day (Chapter Executives Only)

Presenter: **Edward J. McMillan, CPA, CAE**

Executives for not-for-profit organizations are expected to professionally manage the organization in such diverse issues as financial management, legal matters, IRS compliance issues, personnel management, state laws, establishing policies and procedures, insurance coverage, internal controls, board training and relations, fringe benefits issues as well as many others. Failure to address these important subjects can have serious negative effects on the organization as well as the executive personally.

This session is a current, constantly evolving, cutting-edge program that discusses these and other important issues in depth.

Policy, Politics and Construction

Presenters: **Stan Kolbe, Director of Legislation,** SMACNA

Dana Thompson, Director of Political Affairs, SMACNA

Stan Kolbe, director of legislation, and Dana Thompson, director of political affairs, will lead a conversation on lessons learned in the 111th Congress. Catch up on all of the issues SMACNA has worked on in the last two years, including health care, energy efficiency incentives and misclassification. The session will also include a review of the Senate and House November midterm elections. The look ahead at the 112th Congress will include how the contentious debate on health care this year might affect Congress in the future. Come prepared for an entertaining exchange.

The Basics of BIM

Presenters: **Matthew Cramer, President** Dee Cramer Inc.

Steve Hunt, BIM/CAD Manager Dee Cramer Inc.

This session is designed for SMACNA contractors who are eager to learn the essential concepts of BIM (Building Information Modeling), what's needed to get started, and where BIM is heading. Matt Cramer and Steve Hunt will address the BIM process details and how BIM equates to faster, better and lower cost projects resulting in satisfied customers.

9 ••

SMACNA's Reference Manual for Labor Units

Presenter: **Kevin L. Dougherty, Consultant**

SMACNA's Labor Units Manual for Sheet Metal and HVAC (the previously titled Cost Reference Manual) provides users with a source of labor unit data required to fabricate and



install heating, ventilation and air conditioning materials and equipment.

In this session Kevin L. Dougherty will discuss important features of the manual and will demonstrate its use including a new electronic spreadsheet feature which calculates adjustments in the 138 labor unit tables for project types and non-typical and job site conditions.

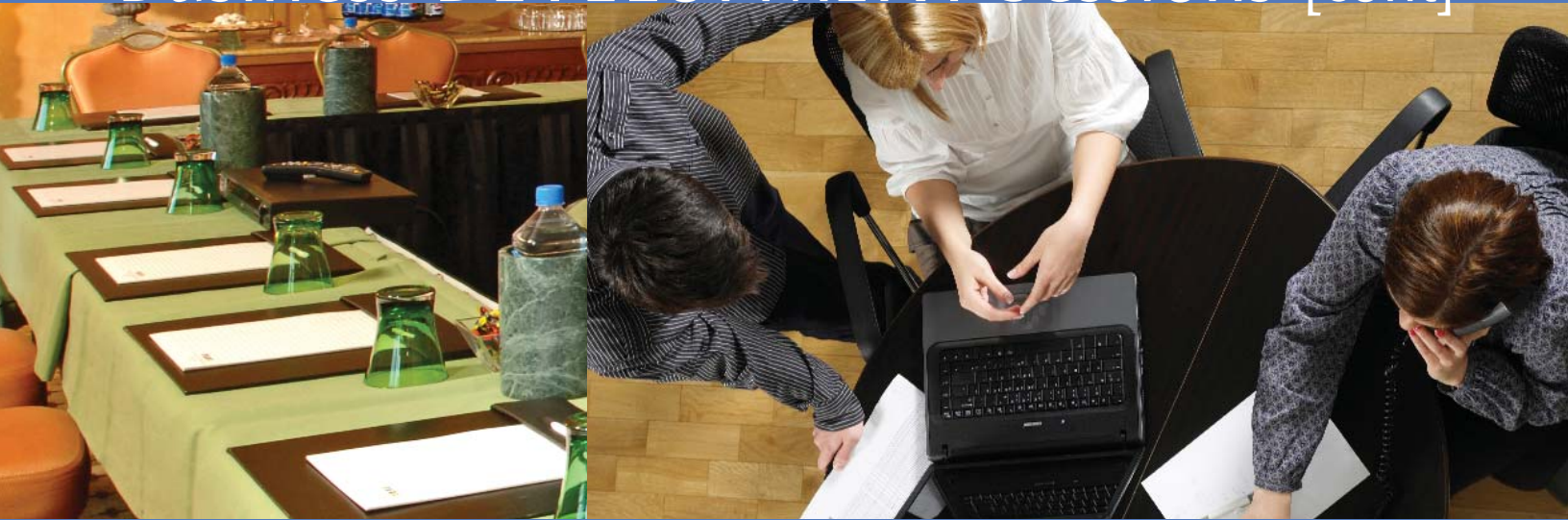
Kevin Dougherty represents a changing industry—aggressive, realistic and open-minded. His work and education experience enables him to relate to today's problems and provides tangible solutions in an easy-to-listen style.

[Continued on page 10]

PHOENIX



Business DEVELOPMENT Sessions [cont]



•• 10 ATTEND THE SMACNA BUSINESS DEVELOPMENT SESSIONS

NEMI Energy Auditing and Fire Life Safety Training and Certification

Presenters: **Anthony (Tony) Picarazzi**, Administrator, National Energy Management Institute (NEMI)

James Page, ITI-TABB Specialist, International Training Institute (ITI)

The HVAC energy audit and assessment market is growing and NEMI has developed a training and certification program to provide SMACNA contractors with valuable tools to help them compete.

NEMI's HVAC Fire Life Safety training and certification programs prepares contractors and technicians to properly install, inspect and maintain the dampers, and thus, makes an important contribution to the execution of the fire protection design and overall building performance in the event of a fire.

This session will provide an overview of these two training and certification programs.

Feng Shui For Real Life

Presenter: **Carol M. Olmstead, FSII**

Feng Shui is a design system for arranging your surroundings in harmony and balance with the natural world around you. In Chinese Feng Shui means "wind and water." Your surroundings have a powerful affect on what you attract into your life. This session is a contemporary, practical approach that allows you to use what you already have and what you want to acquire to bring good things into your life.



Carol M. Olmstead is a Feng Shui master practitioner and a nationally-recognized consultant, author and speaker. She focuses on the practical applications for our culture today. Carol uses her natural intuitive sense and business savvy to bring easy-to-implement, real-world solutions to improve inauspicious situations and attract health, happiness, love, and prosperity.

She is frequently profiled and quoted in the media. She is a frequent guest on broadcast and internet radio shows.



SESSIONS