

YOUR EXCLUSIVE INVITATION

**A/E/C
Executive
Retreat:
Rethink, Refresh, and
Renew Your Firm's
Success Strategy**



When: 14 -16 November, 2024

Where: Mantra Legends Hotel, Gold Coast, Queensland

Join us for this exclusive executive conference. Over 3 days of powerful, candid, and confidential dialogue on the critical decisions that determine business success, you will make priceless connections with other A/E/C leaders facing identical challenges.

We will share our best ideas and experiences for overcoming tactical and structural impediments to revenue growth, testing new business models, and capitalising on rapid changes sweeping the A/E/C industry:

- Will the coming disruption in the architecture and engineering industry unleash your firm's growth potential, or will it struggle to adapt?
- Is your succession plan designed to weather any storm, or could it fail to achieve your objectives when put to the test?
- How can you find the talent you need to execute the most profitable projects, and refill your leadership pipeline, given the demographic shifts pushing back against your most ambitious projections?
- Where is the next huge business growth opportunity poised to appear, and how can you act NOW to take advantage of it?

As a key leader, you face constant demands to put out fires and solve the "problem of the day". That leaves no time or space to step back and address the big challenges and opportunities that will determine your firm's growth curve over the next 3-5 years.

That's why we think you should join a select group of peer firm leaders in November 2024 for PSMJ Asia Pacific's A/E/C Executive Retreat: Rethink, Refresh, and Renew Your Firm's Success Strategy, at an exclusive gathering at Mantra Legends Hotel, Gold Coast.

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See our more detailed agenda, and secure one of only 25 openings available for this exclusive gathering, at [PSMJ.com.au/courses/GOLDCOAST](https://www.psmj.com.au/courses/GOLDCOAST)



A/E/C EXECUTIVE RETREAT KEY TAKEAWAYS:

PRIVATE EQUITY: Who will benefit from the private equity cash tsunami upending and consolidating our industry? What can you do NOW to make sure you're riding the wave, not swept out by the undertow?

COMPENSATION: How much are other A/E/C organizations paying in salary and benefits for technical and design staff? How can you get more from your spend?

PERFORMANCE BENCHMARKING: How does your firm's financial performance compare to others that serve the same markets and employ similar numbers of people?

ESSENTIAL KPIs: What are the key metrics (many of them counter-intuitive) that the most successful firms watch carefully?

VALUATION: What shareholder valuation methodologies are best for your firm, and which should be discarded?

FEE STRUCTURES: How are some firms moving away from a time-based billing model, even with remote teams and work-from-home project managers, *and* seeing gross revenue and profits jump?

A.I.: Where is artificial intelligence starting to have a significant impact on how quickly and successfully A/E/C projects get done? Should you jump on the bandwagon now, or wait for the next generation of applications?

OWNERSHIP TRANSITION: Who should be on your board of directors? How can you stress-test your ownership transition plan?

BUSINESS DEVELOPMENT: What's working for peer execs to build a healthy and sustainable backlog of high-profit projects, and how to find the talent to execute them?

Reserve A "Challenge I Have" Seat and Benefit from the Group's Wisdom!

Do you want even more perspective on your specific challenges? Get in the Challenge Seat! We carve out time for 3 participants to present a case study related to their firm.

We then lead a discussion around solutions to that challenge. You gain tangible strategies from the group's wisdom. This is only available to 3 participants. To request a Challenge Seat slot, just mention this in your registration and we'll be in touch with more details.

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WILL YOUR A/E/C FIRM GROW... OR STAGNATE? THE CHOICE IS YOURS!

A/E/C Executive, here's your challenge: Shift your firm's **GROWTH plan** so it works regardless of conditions over the next 24-36 months, as talent remains scarce, technology upends traditional A/E/C business models, and competitive pressures challenge your fee structure.

Your Solution: The A/E/C Executive Retreat: Rethink, Refresh, & Renew Your Firm's Success Strategy at the Mantra Legends Hotel Gold Coast on November 14-16, 2024. You will build, through candid discussion with other firm leaders just like you, and PSMJ Asia Pacific's A/E/C business management experts, a new custom growth plan to attack the biggest opportunities and massive upsides to our current industry conditions:

New: Growth-Focused Strategy: Your Action Plan for Driving Gains in the Next Normal

Architecture and engineering firms committed to scaling up need a bold new strategy for innovating, staffing, and managing the explosion of Work-From-Anywhere project management. We examine a new growth strategy for your practice that aligns with capitalisation and overhead-reduction opportunities. Plus we look at the performance metrics you should be (and maybe aren't) monitoring.

New: Growth-Focused Marketing: Get the Clients You Want

Is your new business pursuit team adjusting to radically new meeting platforms? How should you manage virtual permitting board meetings and other approval processes? Do you know what it takes to gain undying loyalty for life from larger clients? We'll share powerful business development and marketing strategies that have been proven to work in the current environment.

New: Growth-Focused Compensation/Talent Practices: It's time to make smarter pay, bonus, and staffing decisions. The next normal in staff management means performance evaluations built on different KPIs, hybrid video-based interviews for new hires, and marked changes to how we retain talent. We discuss unique opportunities to operate the growth engine on a lean setting, and how to find and keep the best growth-oriented employees, motivate every different generation, and avoid the bad hiring decisions that doom growth.

New: Growth-Focused Technology Choices: Make better capital investments for this next normal.

Have you established critical design, data and workflow security processes for remote teams? What kind of tech investments make sense now for firm growth and which should be put off? We'll dive into the tech platforms that A/E/C firms need to manage teams remotely and keep clients happy and the hottest tech issues that the C-Suite has to stay on top of.

New: Growth-Focused Project Management: Make Sure Remote and Hybrid Workforces Stay Profitable.

The new work environment has A/E/C leaders racing to establish new utilisation and productivity monitoring metrics. We share the best practices and KPIs that the most successful firms have used for years to track both PMs and projects for maximum effectiveness. Learn exactly how the top firms in PSMJ's annual Circle of Excellence not only eliminate poor project management write-offs costing 45% of profits, they actually drive an additional 15% to the bottom line through superior techniques.

New: Growth-Focused Mergers and Acquisitions: A Once in a Lifetime Opportunity to Go Big.

There may never be a better time to consider M&A as a strategy. Demographic shifts and an increasing number of senior principals unwilling to weather another dip mean prime M&A targets abound, but it's not right for everyone. We'll talk candidly about the risks and rewards of pursuing growth via acquisition in the months ahead, the red-flag warnings that are actually easy to miss, and how to find that diamond in the rough.

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YOUR RETREAT
FACILITATORS

Frank Stasiowski. For over 40 years, his candid and often counter-intuitive advice has help A/E/C leaders propel their organisations to breakthrough growth and profitability. Frank actively serves as an outside director for architectural and engineering firms around the globe. This experience includes serving as a director for a publicly-traded, 4,000-person engineering firm.

Frank challenges his clients to excel, thinking differently about their constraints and obstacles. He sees his role as one of guiding firm leaders through a perspective that may not come naturally to them. He views success ultimately as clients not simply following his recommendation, but rather making their own decisions guided by his insight.

Frank is a prolific author, writing hundreds of articles for the *Professional Services Management Journal* and many books intended for architecture and engineering firm leaders, such as his best-sellers *The Value Pricing Imperative for Design Firms* and *Impact 2030*.

As an international speaker to audiences from five to more than 5,000, Frank is well-known for his data-driven (and a bit daring) look into the future of the business of architecture and engineering. His energetic and down-to-earth speaking style always draws rave reviews.

Among the areas where Frank brings particular expertise as an advisor, facilitator, and speaker are strategic planning, transition planning, and mergers & acquisitions. In addition to his advisory work, Frank spends a significant amount of his time delivering presentations and facilitating meeting discussions, planning retreats, workshops, and training sessions all with the goal of dramatically improving the business performance of A/E/C organisations worldwide.



Shane Fracchia. Shane is a strategist and director of specialist consulting firm Fracchia Advisory, which assists boards, executives and business leaders grow their opportunities and navigate the risks impacting their business and projects. Shane specialises in strategic design/planning, performance analysis and reporting for the professional and human services sectors.

Shane has been a senior executive for over 25 years with experience across a range of industries including health and aged care; chartered accounting, engineering and architectural services; management consulting and defence.

Shane is also a professional non-executive director and holds formal qualifications in engineering, commerce and management; including an MBA from Deakin and leadership studies at Harvard. He is a recipient of the AIM Professional Manager of the Year, the Australian Defence Medal and a Fellow of both the Institute of Company Directors and CPA Australia.

His professional skills, attention to detail and ability to collaborate at all levels has enabled him to achieve significant results in challenging environments.

Thursday, November 14, 2024

5:30 PM - 7:00 PM Networking Cocktail Reception

We gather for a low-key "get-to-know-you" reception where we meet and network with peer Retreat attendees in a casual setting.

7:00 PM Gourmet Dinner and Welcome – Fables restaurant

We set the scene for the next 2 days and get specific about the action plan YOU want to address.

Friday, November 15, 2024

7:30 AM - 8:30 PM Breakfast

8:30 AM - 12:30 PM Morning Group Session

PSMJ Resources Founder and A/E/C Industry visionary Frank Stasiowski leads an eye-opening discussion: Disruption & Opportunity Ahead: What the Future Holds for A/E/C Firms.

We'll then compare your firm's Post-COVID experiences and performance with what peer executives from high performance firms are revealing through PSMJ's benchmarking data and member discussions. How effectively is your firm attacking the BEST new business opportunities in a robust climate? Where does that stand compared to industry trends? What's working to build a healthy and sustainable backlog of high-profit projects? What's a dead-end?

We will explore some major disruptions that are poised to radically re-shape our industry. How are some firms ditching antiquated time-based business models (and long-despised timesheets)? How is AI going to turn your firm's staffing needs, capital investments, and value proposition upside down? This is "No B.S." stuff that forward-thinking firms are embracing RIGHT NOW.

Next: An intense study of your firm's vision for growth and mapping your future direction to capitalize on the disruption ahead, and to deliver sustainable stress-tested impact and growth. We'll uncover the specific issues YOU want to bring forward for discussion with peer executive while we're here. This helps us get in front of the near-horizon opportunities and challenges that can bend your firm's growth curve and leverage the collective expertise of your fellow Retreat participants.

12:30 PM - 1:30 PM Casual lunch

1:30 PM - 5:30 PM Executive Sessions

Next: a deep dive into specific challenges for A/E/C seniors, with targeted, facilitated discussions that reveal solutions to the things that keep you awake at night:

- **Winning the War For Talent** – Practical insights and solutions critical to A/E/C business growth, engaging work environments, intrinsic motivation, and examples from high performing firms.
- **Executive Performance Reporting** – What should A/E/C boards expect executives to show them, not just tell them? We unpack issues with current reporting and how to address it, plus good governance, enterprise risk management, and more.
- **Financial Reporting and Performance** – Gaps in financial reporting and how to fix them, fee recognition, P&L structure and categories, your profit lines and why they are important, profit centre issues, reporting and allocating overhead, managing and reporting WIP, provisioning for leave, managing subconsultants, interoffice reporting, and benchmarking against the best.
- **Succession Risks and Opportunities** – Is your exit plan rock-solid? We discuss your options, realising your investment, leaving a legacy and a tip on the table – all before it's too late. Plus how to develop a firm valuation / shareholder strategy that attracts, retains, and incentivises talent. AND, creative win-win strategies that solve the most common issues that break transition plans.

6:30 PM Group Dinner at the casual Fables Restaurant.

Saturday, November 16, 2024

7:30 AM - 8:30 AM Breakfast**8:30 AM - 12:30 PM Group Session:**

Future-Proofing Your A/E/C Firm: Critical M&A Trends, Smart Tech Investment Strategy, Effective Corporate Governance, and Creative Transition Planning.

Now we tackle the financial aspects of your growth planning, how we can get your numbers to beat industry norms, the smartest ways to plan capital investments in high-ROI technology, design and finance acquisitions, and what payback period top firms seek to achieve.

Then, we focus on how to structure your firm's board of directors to maximize its positive impact on meeting strategic goals. How to select the right chairperson, board members, new approaches to governance, pros/cons of outside directors, and optimum ways to structure your charter and bylaws for growth.

We wrap up the session by shifting gears to talk about how to leverage new uses for Artificial Intelligence to complete A/E/C projects when talent is hard to secure, what communication, visualization, and collaboration tools tomorrow's clients are going to demand from your firm, including where VDC, XR, and Augmented Reality is headed.

12:30 PM - 1:30 PM Casual Lunch**1:30 PM - 3:00 PM****Going from Idea to Execution: Refocusing BD Efforts, Rethinking Your Recruiting Strategy, and Embracing Agility**

After lunch, we dig into the details of growth strategy execution. We discuss the markets you serve and the new BD and sales strategies you can best use to communicate with them. Here, our goal is to differentiate you from the competition through innovative marketing tactics that work with hybrid virtual and F2F meetings.

Next, we focus talent optimization and why your recruiting and engagement strategies may be ineffective and outdated. We explore why top-performing firms have less difficulty attracting and keeping the best talent.

Finally, we attack strategic culture and what that looks like, how to hurdle growth barriers and scale up, manage risk, improve cash flow, target the right clients, fill gaps in your skills toolbox, and lead your firm through difficult periods.

After two intensive days, you leave energized, exhilarated and eager to apply breakthrough growth strategies, with your plan framework in your hands. You'll have the tools, the insight, the information, the data, the ideas and the assistance of the best the world has to offer... and the opportunity to discuss it all with other design firm executives, just like you!

3:30 PM - 5:00 PM Optional One-on-One Discussions

We insist that you don't leave Mantra Legends with any unanswered questions, so we set aside time Saturday afternoon for one-on-one consultations with your Forum facilitators.

Executive Retreat Program Investment

Program Investment

Your registration and fee

Standard	\$3,950 per person
Early Bird *	\$3,550 per person

Add a colleague from your firm

Standard	\$3,550 per person
Early Bird *	\$3,150 per person

Partner/Social Events Rate

Networking Cocktails & Dinner Thursday & Dinner Friday	\$270 per person
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What your investment includes

Thursday Welcome Networking Cocktails
Thursday Welcome Dinner
Friday breakout refreshments and lunch
Friday Dinner
Saturday breakout refreshments and lunch

What you need to do

Register online for the Executive Retreat at PSMJ.com.au/courses/GOLDCOAST

Hotel Accommodation

Contact Mantra Legends Gold Coast to reserve your accommodation

Tel: 07 5588 7888 or online www.mantralegends.com.au

Confirm that you are a participant registered for the PSMJ Executive Retreat and they will reserve your accommodation at a 10% discount on their standard rates for room and breakfast.

For those coming by car there is limited hotel parking, so reserve early.
There are also parking stations within 5 minutes walk.

Terms and Conditions

* Early Bird is applicable to any registration and payment by 30 June 2024

All fees and expenses quoted are GST exclusive

- Cancellation policy
- Full refund up to 30 June 2024
 - 50% refund up to 31 August 2024
 - No refund after 30 September 2024



Bonus Gift

All program registrants will receive an autographed copy of Frank Stasiowski's 204 pp book
Impact 2030; Disruptions in the Design Industry for the next 10 years