

Lesson Plans

Session 1: Dealer Economics & Principles of Project Management

This session will provide an overview of the basic principles of project management both as a discipline within the dealership and as defined by the academic world. We will discuss a definition of project management, the roles and responsibilities within the dealership, and seven key project management concepts. We will explore different dealership organizational models for Project Managers and review job descriptions and best practices.

Our discussion on dealer economics will cover the four key causes of profit margin erosion. We will examine strategies for minimizing margin erosion and the Project Manager's role in implementing them.

Learning Objectives

- An understanding of dealer economics
- 4 key causes of margin erosion
- Principles of project management
- Roles and responsibilities with the dealer
- 7 key project management concepts

Handouts

- Session Workbook
- Project Management Overview
- Key Concepts of Project Management
- Solomon Coyle Job Descriptions
- Project Management Knowledge Areas List
- Project Management Performance Overview
- Project Management Performance Standards
- Account Management Performance Standards

Session 2: Quote-to-Invoice Process

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Session 2 will focus on the role of the dealer Project Manager in the Quote-to-Invoice Process. In Part One, we will discuss the three elements of the Sales Order Process—pre-order, order management and project close-out—with an emphasis on streamlining the process and dealer best practices. You will learn how the Project Manager can enhance the overall Sales Order Process.

In Part Two, we will focus on the Work Order Process and the role of the Project Manager. We will review the elements of the Work Order Process, from the service request to field communication. We will also discuss best practices and how an efficient process impacts project success.

Learning Objectives

- An understanding of the quote-to-invoice process
- Project Manager's role and impact in the Sales Order Process
- Developing a service solution for the sale
- Best practices to prevent margin erosion
- Role of the Work Order Process in the dealership
- Importance and elements of the Work Order Process
- How the Work Order Process contributes to project success
- Best practices for efficiency

Handouts

- Session Workbook
- Quote to Invoice Process Outline
- Sales Order Process Overview
- Work Order Process Overview
- Sample Delivery Installation Quote Request
- Installation Bid Requirements
- Sample Installation Packet Cover Sheet
- Solomon Coyle Installation Estimating Workbook
- Project Management Knowledge Areas List
- Project Management Performance Overview
- Project Management Performance Standards
- Account Management Performance Standards

Exercise

Review your own Work Order Process using the Solomon Coyle review tool. Read Solomon Coyle Installation Estimating Workbook.

Session 3: Installation Estimating

Part One of our discussion will provide an overview of the installation estimating process and the importance of consistent and accurate estimates to dealer profitability. You will learn how the concept of

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estimating differs from pricing furniture product, general limitations of labor estimating, and the role of material handling and third parties in estimating. We will also discuss how the Solomon Coyle prototype estimating process differs from other estimating methods.

In Part Two, you will learn how to use the Solomon Coyle installation estimating methodology. We will discuss the prototype elements and review the estimating worksheet and how to use it. We will also review rules of thumb for adjustments for site, product and project conditions, different product line prototypes, casegood hours, non-phase hours and more.

Learning Objectives

- Importance of installation estimating
- Key problems encountered
- Role of material handling and third parties
- Efficiency and effectiveness factors
- Solomon Coyle estimating process
- How to apply the Solomon Coyle estimating process
- Estimating rules of thumb

Handouts

- Session Workbook
- Competitive Systems Comparison
- Two Complete Estimating Examples
- Estimating Worksheet

Exercise

Complete the installation estimating example using the materials provided.

Session 4: Planning the Project

Session 4 will focus on how to plan a contract furniture project, from initial analysis and order entry to invoicing and collections. We will discuss how project analysis is the key to project planning, look at what constitutes a comprehensive project plan, and examine the elements of a project plan.

Learning Objectives

- Key elements of a project plan
- Why analysis is the key to planning
- Documenting and communicating the plan to the client, team and third parties
- How a great project plan can result in higher profitability

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Handouts

- Session Workbook
- Installation Analysis
- Project Checklist
- Sample Project Schedules
- Sample Furniture Estimates
- Site Review Information

Exercise

Write a scope of work.

Session 5: Project Communication; Managing the Client

Session 5 provides guidance on how to set client expectations, manage the decision-making process, and communicate in a professional manner that mutually benefits the dealer and the client and fosters a smoothly running project. We will discuss what constitutes good project documentation and examine various documentation methods. We will also look at problems that can stem from poor communication and how to avoid them.

Learning Objectives

- Setting client expectations and decision making
- Importance/types of communication and documentation
- Documenting key decisions

Handouts

- Session Workbook
- Sample Project Documentation

Session 6: Managing the Contract

Session 6 extends the discussion of effective communication and client management from Session 5 into the complex issues of managing the contract between the customer and the dealer. We focus on how to manage the scope of work and get paid for change orders and review the critical elements in the Sales Terms and Conditions. We also discuss forms management and review a set of useful forms.

Learning Objectives

- Managing the scope of work
- Critical elements to include in dealer Terms and Conditions
- Change order compensation

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Handouts

- Documenting change orders for customer payment
- Session Workbook
- Sample Terms and Conditions
- Sample Scopes of Work
- Sample Change Order Memos

Exercise

Review dealer Sales Terms and Conditions and compare to Solomon Coyle best practice recommendations.

Session 7: Managing the Project

This session begins with a look at the five broad responsibilities of a contract furniture dealer Project Manager: developing the quote, entering an accurate order, getting the order to site, managing the installation, and closing out the job. As part of our discussion, you will learn how to leverage the manufacturer's capabilities when setting up a logistics plan. We will also define roles and responsibilities with subcontractors and discuss how to work together on projects. In addition, you will learn how to manage corrective actions most efficiently and teach field personnel a very accurate and complete punch-list process.

Learning Objectives

- 5 key project aspects
- How to leverage the manufacturer's capabilities
- Job close-out issues
- Managing corrective actions efficiently
- Punch list process

Handouts

- Working with subcontractors effectively
- Session Workbook
- Manufacturer Information for PM Training
- Dealer/Installer Roles and Responsibilities
- Punch-List Process Overview
- Sample Status Reports
- Sample Punch-List Form
- Sample Furniture Schedule

Exercise

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Complete the manufacturer's Shipping Capabilities Form. Document dealer's corrective action process. Develop and review list of forms used in the dealership.

Session 8: Project Management as a Profit Center: Selling Services

This session will focus on how to market project management services as fee-based services to customers. You will learn how to price project management services and how to use "clues" to sell the intangibles of a service product. We will discuss how to effectively market project management services to both internal and external clients. Finally, we will discuss how the customer sees the project management value proposition and how selling services differs from selling products.

Learning Objectives

- Project management value proposition
- Determining project management services cost
- Marketing project management services

Handouts

- Session Workbook
- Benefits of Project Management
- Project Management Services Description
- Sample Hourly Cost Worksheet
- Service Competencies
- Project Management Processes for Various Project Types

Exercise

Complete market analysis. Evaluate how competing dealers position and sell project management services.

Session 9: Review and Reinforcement

This session will review key points from the previous training sessions to reinforce the issues that are most important for a successfully managed contract furniture project. Highlights will include the role of analysis and planning, the client's view of the Project Manager value proposition, how to get paid for change orders, installation pricing from the installer's point of view, and how to minimize margin erosion.

Learning Objectives

- Review of key concepts

Handouts

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- Session Workbook

Session 10: Using What You Learned in This Program

In the final session we will discuss how to apply the principles learned in this course in your dealership. We will focus on the day-to-day issues Project Managers face and strategies for overcoming obstacles. Participants are encouraged to bring their biggest challenges to the group for creative problem solving during this session.

Learning Objectives

- Applying principles learned

Handouts

- Certificate of Completion, upon successful completion of final exam.

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