



ZWEIG GROUP TRAINING PROGRAMS The Principals Academy

Zweig Group's flagship training program encompassing all aspects of managing a professional A/E/C services firm.

It's the most impactful two days you can spend learning about principal leadership, financial management, strategic planning, recruiting, marketing, business development, and project management.

This two-day seminar is presented by a team of speakers – including Zweig Group Founder and Chairman Mark Zweig and President and CEO Chad Clinehens – with extensive experience working with and for AEC firms. The Zweig Group team has a clear understanding of what it takes to lead and grow a firm. The Principals Academy is continuously updated with the latest approaches to leading a successful firm with an expanded focus on business development, strategic planning, and financial management.

TWO-DAY PROGRAM OVERVIEW & AGENDA

DAY ONE: 8:30 am – 4:30 pm – DAY TWO: 8:30 am – 3:30 pm –

What It Means to Be a Principal

- Explore facts about principals in the industry
- Understand what it means to be a "Principal" in an A/E/C firm
- Qualities and expectations of principals

Business Planning for Principals

- Why strategic plans are necessary
- Building and executing a business plan

Accounting

- Understanding financial statements and methods of accounting
- Legal forms of organizations

Management and Leadership for Principals

- Techniques for improving project management
- Effective leadership attributes and techniques

Marketing

- Why marketing is critical to your firm's success
- The foundations and critical elements of marketing and branding

Firm Ownership and Transition

- Where firms go wrong with ownership transition
- Elements of internal and external transitions

Business Development and Sales

- How business development is different from marketing
- Developing more business for your firm
- The importance of making everyone a doer-seller

Financial Management

- Understanding key financial performance metrics
- Improving billing and collection

Recruiting and Retention

- Hiring and keeping great talent in a tight market
- Understanding your key performance indicators

"M&A in an Hour" Short Course

- The mergers & acquisitions process is not as intimidating as it seems
- Best practices in mergers & acquisitions

How to Lead a Successful Firm

- How successful firms perform better than their competitors
- Tips for leading successful firms

Principals Roundtable

- Question & answer period with the Zweig Group consulting team

DAY ONE:

What It Means To Be A Principals
 Business Planning For Principals
 Accounting
 Financial Management
 Marketing
 Management & Leadership for Principals

DAY TWO:

Recruiting and Retention
 Business Development and Sales
 Firm Ownership and Transition
 How to Lead a Successful Firm
 Principals Roundtable

CONTINUING EDUCATION: 12 PDH / 1.2 CEU



Zweig Group seminars are eligible for Professional Development Hours credits and Continuing Education Units. All attendees receive a certificate of completion indicating the number of hours earned during each seminar.

THE PRINCIPALS ACADEMY