



## **Planning Your Peer Group Meeting:** **Sample Agenda Items**

*This information has been put together with submissions from ABC's peer groups.*

### **Financial**

- Financial Analysis & Comparative Ratios
- Determine Break Even Point
- Outside Investments and Retirement
- Accounting Methods and Software
- Managing Cash Flows
- Operation Overhead
- Gross Margins
- Labor Burden
- Banking
- Bonds
- Insurance
- Legal Matters
- Liens and Law Suits
- Selling Out
- Types of Company Structures (S Corp., C Corp.)
- Strategies for Collecting Receivables in a Timely Manner
- Business Succession Planning
- Theft/Fraud
- Accounting Software

- Relationship of Overhead Costs to Direct Costs
- Profitability

### **Employees (People, Pay and Performance)**

- Office Employee Compensation
- Accountability
- No Compete Clauses and Other Agreements
- Field Employee Compensation
- Employee Reviews
- Hiring Policy
- Staff Allocation – Percentages
- Wage Scales
- Tracking of Labor
- Career Paths – Developing a System for Advancement
- Workers Compensation
- Safety Programs & Incentives
- Ratio of Office to Field Employees
- Compensation for Executives
- Salting
- Training Programs & Incentives
- Finding and Keeping Good Employees
- Training Field and Office Employees
- Employee Surveys
- How About that Raise?
- Wages & Hourly Rates: Clerical, Estimating, Project Manager and Field
- Job Descriptions
- Overnight Per Diems/Pay for Travel

- Disbursement of Expense Funds
- Organized Labor
- Life Insurance Plans
- Field/Management Incentives
- Employee Handbook
- Effective Incentive/Benefit Programs
- Employee Stock Ownership
- Office Structure and Organizational Charts
- Employee Incentives and Benefits
- Company Vehicles
- Pre-Employment Surveys
- Journeyman Continuing Education
- Mentoring Programs
- Licensing/Apprentice Ratios
- Project Manager Development
- Open Management – Sharing Information with the Office and/or Field

### **Growth, Strategic Planning, Marketing & Advertising**

- What Will the Market Bear?
- Flat Rate Pricing
- Gathering Data on your Competition?
- Advertising Expense
- Customer Relationship Management
- Determine Who and What Makes a Good Customer
- Justification of Success
- Is there an Optimum Size?
- Customer Service

- Market Niches
- Differentiation: How to Sell on Value, Not Just Price
- Company Strategy for Proper Growth
- Marketing and Promotion of Sales
- Effective Means of Expanding Preferred Customer Base
- Use of Outside Consultants
- Critical Business Indicators
- Web site development
- Mergers, Acquisitions
- Corporate Structure
- Tactical Planning
- Strategic Process/Initiatives & Progress/Measurement

### **Operations**

- Competitive Bidding
- Scheduling with General Contractors
- Jobsite Management/Organization
- Pre-Job Handoff/Turnover
- Inventory Control
- Material Waste
- Efficient Tracking of Field Labor
- Productions Costs & Job Tracking
- Tool Control & Tracking
- Company Forms
- Material Flow Process
- Workflow Systems to Track Work from Order Entry to Final Payment

- Material & Equipment Cost
- Productivity
- Telephone Systems
- Communication Systems
- Estimating Methods and Procedures
- Estimating Software, Accounting Software
- Quick Ratios to Check Estimating Accuracy
- Technology Available to Improve Productivity
- Project Management
- Remote Offices and/or Jobs
- Design & Build Work
- Holding Project Managers and Estimators Accountable
- Scheduling and Man Power
- Pre-Fab Techniques
- Tracking Tools and Equipment
- Renting or Purchasing Equipment
- Purchasing Agent
- Purchasing Procedures
- Types of Forms Used (Report, Tracking, PO, Subcontract, etc.)

### **SERVICE DEPT:**

- Estimating
- Scheduling and Dispatch
- Work Orders – Forms and Reports
- T&M Billing
- Determine Hourly Rate Structure
- Flat Rate Pricing

- Training the Service Tech
- Rolling out the Red Carpet
- Service Structure and Billing

### **COMPANY VEHICLES:**

- Truck Maintenance and Other Costs
- Vehicle Expense Reports
- Truck Expense per Service Call
- Employees Taking Trucks Home

### **SUPPLIERS:**

- Partnering with Suppliers
- Supplier Errors – Determining Cost
- Scrutinizing Pricing on Supplier Invoices/Quotes
- Large Job Buy Lists
- Paying Suppliers 30/60/90 Days
- Supplier Pricing Comparisons