



# Contractor Services of America - Request for Services

CSOA WEB Site — www.contractor-soa.com

## Contractor Information

CSOA Contractor # \_\_\_\_\_

Company: \_\_\_\_\_ Phone#: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

Address: \_\_\_\_\_ Fax#: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

Name: \_\_\_\_\_ Title: \_\_\_\_\_ E-mail: \_\_\_\_\_

Cell Phone #: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_ Company Web Page: \_\_\_\_\_

**Services**  1. Consulting  2. Training/Coaching/Educate  3. Mentor/Counsel/Collaborate

### 1. Consulting

#### Analyze/Evaluate/Advise:

- Operating Structure
- Company Procedures
- Strength Analysis
- Cash Flow
- Month End Closing
- Profit and Loss Statements
- Balance Sheet
- Work In Progress (WIP) by job and/or entire company
- Project Job Cost

#### Analyze/Evaluate/Advise—continued:

- On-Site Monthly Project Reviews
- Bonding Reports prior to submission
- Banking Reports prior to submission
- Receivables
- Payables
- Project Estimates pre bid
- Project Estimates post award
- Contract Review and Recommendations
- Custom Software Packages

#### Analyze/Evaluate/Advise—continued:

- Standard Software Package recommendations and setup depending on certain factors that are company specific
- Hardware and Network Evaluation and Repair
- \_\_\_\_\_
- \_\_\_\_\_

### 2. Training/Coaching/Educating

#### General Business Classes

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| <ul style="list-style-type: none"> <li><input type="checkbox"/> Percent Complete Accounting</li> <li><input type="checkbox"/> Why do Business's have Controls</li> <li><input type="checkbox"/> Why &amp; how of being a Team Player</li> <li><input type="checkbox"/> Leadership, Teamwork and Business Development</li> <li><input type="checkbox"/> Customer Relations</li> <li><input type="checkbox"/> Changes in the workplace/The Cheese</li> </ul> | <ul style="list-style-type: none"> <li><input type="checkbox"/> Getting the Job Done—On Time</li> <li><input type="checkbox"/> Marketing your Company</li> <li><input type="checkbox"/> Project Teaming 2007</li> <li><input type="checkbox"/> Cash Flow</li> <li><input type="checkbox"/> Leading Edge Technology</li> <li><input type="checkbox"/> Different People/Different Personalities</li> <li><input type="checkbox"/> Dealing with the Employee Age Gap</li> </ul> | <ul style="list-style-type: none"> <li><input type="checkbox"/> Problem Solving and Resolving Conflicts</li> <li><input type="checkbox"/> Business Ethics</li> <li><input type="checkbox"/> _____</li> <li><input type="checkbox"/> _____</li> </ul> |
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#### Project Management/Superintendent

##### General:

- Proper Documentation
- Negotiating Effectively
- How and why you should properly Bill and Collect
- Making sure your Subcontractors succeed on the project - When they succeed you succeed
- Responsibilities of the Project Manager
- Responsibilities of the Superintendent
- Project Manager/Superintendent responsibilities to each other
- Change Order Recap Sales and Justification to Customer
- Change Order Selling/Processing
- How to properly Manage your Project on a day to day basis
- Analyzing and Understanding Contracts
- Understanding Project Controls
- Dealing with a tough Owner

##### Project Set Up:

- How to properly Budget and Cost Code a project for accurate reporting
- How to properly report Payroll on a project with many budgeted cost codes
- How to properly set up and bill an AIA Billing

##### Reporting:

- Work In Progress (WIP) - What are the numbers really telling you
- Work In Progress (WIP) - How do you really earn revenue and profit and what about over/under billing
- Understanding Job Cost Reports, locate issues early and do something about it
- Understanding A/R

##### Month End Closing:

- Understanding Month End Reports
- Preparing for and making proper projections for Month End
- Project Assessment/Cost to Complete

##### Scheduling:

- Project Scheduling - Labor and Materials
- Delay Issues With Construction Schedules & Claim Avoidance
- Controlling Manpower in today's market — Task Scheduling
- Motivating and Managing the workforce

##### Estimating for the Project Manager:

- Change Order Estimating
- How to prepare a Cost to Complete Estimate

##### Cash Flow:

- Project Cash Flow and Schedule of Values

##### Record Keeping:

- On-Site Record Keeping including Safety

##### Brainstorming and Planning:

- Site Meetings
- Project Logistics - Parking, Lay-down, Roadways, Trash, Safety, Etc.
- The importance of Layout Drawings
- Purchasing, Releasing and Handling of materials
- Material Handling - Inventory Control
- Labor — Shortcuts/Ideas & Project Assessment
- Project Installation and Planning

##### Training:

- On-Site Project Review - How to properly walk a project
- Field Training Subordinates
- Passing on the knowledge with training and follow through
- Understanding what makes a Subcontractor click
- Understanding what makes a General Contractor click

##### Human Resource & Risk Management:

- Human Resource
- Risk Management
- Increasing Profit by Reducing Injuries
- \_\_\_\_\_

## 2. Training/Coaching—Continued

### Estimating

<input type="checkbox"/> Estimating Level 1 — Fundamentals Systematic Approach to Estimating <input type="checkbox"/> Estimating Level 2 — Bid Techniques <input type="checkbox"/> Estimating Level 3 — Conceptual Estimating/Budgeting/Design Build	<input type="checkbox"/> Estimating Level 4 — Front End Specification Review/Risk Analysis/Bonds & Insurance <input type="checkbox"/> Responsibility of the Chief Estimator <input type="checkbox"/> Preliminary Bid Schedules	<input type="checkbox"/> Subcontractor Proposal Review and Analysis <input type="checkbox"/> Project Presentation <input type="checkbox"/> _____
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## 3. Mentoring/Counseling/Collaborate

<b>Mid-management:</b> <input type="checkbox"/> Understanding Contracts <input type="checkbox"/> Understanding Management Reports <input type="checkbox"/> Understanding Project Reports <input type="checkbox"/> Resolving Issues that these reports indicate	<b>Mid-management — continued:</b> <input type="checkbox"/> Job-Site Issue Resolution <input type="checkbox"/> Understanding their new job or position along with the responsibilities <input type="checkbox"/> _____	<b>Senior Management:</b> <input type="checkbox"/> Colleague services to discuss issues, resolutions, proposals and concepts <input type="checkbox"/> Advisory Board Services <input type="checkbox"/> _____
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While our services are offered on an hourly and/or project basis (please call for a quote), most of our clients use the Gold Certified Step Program as follows:

### Gold Certified Step Program

This program was developed for our customer's benefit. For the monthly fee, you earn one-on-one on-site personal days with our staff for use in many different ways (Consulting, Training, Mentoring). Along with the days, you have access to our staff by phone or e-mail when needed. The 4 basic benefits to this program are:

1. Payments are spread out on a monthly basis to not have a major impact on any single month's cash.
2. Encouragement to our customer's to train, ask for advice and allow management mentoring instead of neglecting these very important items affecting your business.
3. Most importantly, your company will earn a level of CSOA certification. Your customers will be made aware of your commitment to training and managing by proudly displaying your CSOA Gold certification level on your web site, brochures and letterhead. Each of these certifications will be verifiable and certified via e-mail.
4. Flex time is included in levels 2 and higher. Flex time is for your firm to have access to our staff for questions and mentoring, review and analyzing, preparation time for onsite training and travel time to and from your site (travel time included-2 hrs.), this makes a complete package excluding expenses. Typical expenses would be books, food, travel cost, etc., if applicable.

The steps to this program are:

- Gold Level 1 Certification:** Access to our staff via phone or e-mail for up to 6 hours per month. No on-site service or flex time at this level.  
 Fee for Gold Level 1 Certification — \$975.00 per month
- Gold Level 2 Certification:** Earn 1 day the first month then 1/2 day per month thereafter for on-site service. Also included is 4 hours of flex time per month.  
 Fee for Gold Level 2 Certification — \$1,450.00 per month
- Gold Level 3 Certification:** Earn 1 day the first month then 1/2 day per month thereafter for on-site service. Also, access to our staff via phone or e-mail and flex time for up to 8 hours per month. This level includes custom designed training.  
 Fee for Gold Level 3 Certification — \$1,975.00 per month
- Gold Level 4 Certification:** Earn 2 days the first month then 1 day per month thereafter for on-site service. Also, access to our staff via phone or e-mail and flex time for up to 12 hours per month. This level includes custom designed training.  
 Fee for Gold Level 4 Certification — \$3,375.00 per month
- Gold Certification Levels above 4:** Increments of level 3 are added to level 4 at a fee of \$1,945.00 per increment depending on the size of your firm and the amount of locations requiring services.  
 Please indicate the number of increments added here: \_\_\_\_\_

For more information visit — [www.contractor-soa.com](http://www.contractor-soa.com)

(727) 945-9384 or toll free at (866) 945-9384

Contact us by e-mail at [CSOA@contractor-soa.com](mailto:CSOA@contractor-soa.com)

<b>Confirmation:</b>	<input type="checkbox"/> If checked — Not included in CSOA client list	Fax to (727) 945-9394
_____ Company	_____ Name	_____ / _____ / _____ Title Date

Fax this form completely filled out or with just the contractor information filled out and we will give you a call.