



All-Phase Landscaping and Design  
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**Dear Students,**

Thank you for your business with American Trade Secrets as your continuing education provider for CCB and LCB. We have put together this custom training course to enhance your contracting business for your overall benefit. Please review the syllabus below to understand how the course is categorized. If you have any questions or concerns, please contact the listed instructor on this syllabus so that they may be addressed.

*Sincerely, Dain Paul Dejong-Stothoff*



### **American Trade Secrets Contractor Course Syllabus:**

**CBA 975:** Business Administration for Construction Contracting

**Instructor:** Dain Dejong-Stothoff **Email:** [dain@americantradesecrets.com](mailto:dain@americantradesecrets.com)

Please include CBA 775 in the subject line when emailing about this course


### **Campus Locations:**

Classroom location will be announced during orientation email after registration at one of the below campuses:

- Linn-Benton Community College - 6500 Pacific Blvd SW, Albany, OR 97321
- Oregon State University - 500 SW Jefferson Way, Corvallis, OR 97331

### **Course Description and Outcomes**

This course teaches the fundamentals of business administration processes that are required for a successful contracting company. This course includes site analysis, design, inventory, logistics, contract development, procedural operation, managerial accounting, business law, taxation, content marketing, and administration.



*After successful completion of this course series, the graduate will:*

- Understand the principles of business and be able to apply them in their contracting business
- Identify key solutions for client needs and how to contract those solutions into real contracts
- Be capable of drafting plans and writing contracts based on those drafted plans
- Coordinate logistics of raw material within the building schedule
- Understand software and how to incorporate it within any company to increase productivity
- Create marketing content and employ that content into a successful marketing campaigns
- Develop operation schedules and manage those schedules until project completion
- Organize and manage legal employment contracts
- Prepare accounting and tax statements for legal and reporting purposes
- Provide protection by understanding business law and how to operate under set rules
- Have a full understanding of insurance and how to use insurance to help manage risk and safety
- Manage groups of employees and be able to successfully delegate workloads in order to complete building schedules correctly
- Commit to a lifetime of continuing education when it comes to their trade and business

# American Trade Secrets

Contractors CCB/LCB CEH Course Module Series

## Module 1.1 - Site Analysis

Day 1 2:00pm - 3:30pm

- *Evaluation of Site* .....20 Min

*Topic:* Visiting jobsites for the first time and evaluating client needs. Different types of electronics gather data and record for the bidding process.

*Discussion:* How to sell and to cross-sell services on site when evaluating client needs.

- *Measuring and Surveying*.....10 Min

*Topic:* Understanding different tools that are used for collecting measurements and digital mapping. The process of surveying and site analysis.

*Discussion:* The importance of surveying for foundational building

- *Resource Costing*.....30 Min

*Topic:* Accurate material and logistics estimation. Material logistics efficiency and coordination.

*Discussion:* Benefits of in-house delivery services. Pros and cons of outsourcing delivery services.

- *Estimation*.....15 Min

*Topic:* Using trade math and software to accurately estimate material needs. Outsourcing material bids.

*Discussion:* Liability of estimation.

- *Scope of Work*.....15 Min

*Topic:* Submitting detailed scope of work procedure documents and how to create them based off estimation information.

*Discussion:* How to write a scope of work that protects against liability and fraud.

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*Module Completion Total*.....1.5 Hours



Module 2.1 – Design and Engineering

Day 1: 3:45pm- 5:15pm

- *Engineering*.....35 Min

*Topic:* Outsourcing proper engineering companies to develop plans for high-risk projects. Understanding engineering and how it impacts mandatory design.

*Discussion:* Using the engineering phase for risk management during operations. Identifying dangerous hazards during the building process and writing safety protocol for building employees.

- *Plan Development*.....45 Min

*Topic:* Understanding processes required for plan completion. Using information from the site analysis and engineering phases to develop operation costs.

*Discussion:* How to separate liability when outsources engineering services. Ensuring proper insurance coverage when building complex structures.

- *Permitting*.....20 Min

*Topic:* Meeting criteria and conditions of permits requirements. Applying for permits using data and information that is gathered during the site analysis.

*Discussion:* Passing inspection, building to code, and understanding the importance of permitting.

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*Module Completion Total*.....1.5 Hours

Module 3.1 –Contract Development

Day 1: 5:30pm – 7:00pm

- Detailed Resource Cost.....25 Min

Topic: Using data from the site analysis phase to analyze and calculate material/operation resource costs. Understanding how design affects total price and how to manipulate design to hit target projects costs goals.

Discussion: Purchasing and locating correct materials and how to manage damage control when it comes to product warranty.

- Detailed Scope of Work.....20 Min

Topic: Writing detailed operation procedures that reflect the contract that will be performed. Using scope of work documents to protect all parties regarding the performed contract.

Discussion: Understanding the importance and value that a scope of work document contains.

- Payment Schedule.....15 Min

Topic: Understanding payment schedules and how to create them using logistics and other data drawn from the site analysis phase.

Discussion: Identifying the correct payment schedule required for successful completion.

- Clauses, Terms, and Conditions.....20 Min

Topic: How to write clauses into the contract that identifies a formal agreement between both parties reflective of the scope of work. Writing terms and agreements using data from the site analysis.

Discussion: Understanding the value of clauses in contracting and the consequences of neglecting to use them.

- Required Notices.....10 Min

Topic: Serving proper notices required by Oregon State law when contracting.

Discussion: Understanding liens and how to discuss required notices with clients during the contracting phase.

Module Completion Total.....1.5 Hours

## Module 4.1 –Inventory

Day 2: 9:00am - 10:30am

- *Material Supply Chain*.....45 Min

*Topic:* Using data from the site analysis to develop a material supply schedule. Using logistics and scheduling to source material. Understanding wholesale vs. sale and how to determine best sales strategy.

*Discussion:* How sourcing leads to price competition. Understanding how logistics effects price and strategies to reduce total material cost.

- *Storage*.....20 Min

*Topic:* How access to storage affects company purchasing decisions. Using storage to reduce price by wholesale purchasing.

*Discussion:* Using storage to increase profits by reducing material costs.

- *Systems*.....25 Min

*Topic:* How inventory tracking software increases operation efficiency. Increasing profits by scaling material inventory operations.

*Discussion:* Using inventory tracking software to automate operations into systems. Increasing profits by using systems.

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*Module Completion Total*.....1.5 Hours

Module 5.1 – Logistics  
Day 2: 10:45pm – 12:15pm

- *Delivery Methods*.....45 Min

*Topic:* Understanding different delivery options and methods for material transport. How material price is determined by different uses of transportation equipment. Product availability and scheduling conflict solution strategies.

*Discussion:* Determining factors that influence equipment/transportation decision making. The critical importance of proper scheduling and consequences of scheduling errors.

- *Scheduling*.....25 Min

*Topic:* Developing schedules of delivery based on equipment usage and availability. How to charge for specialty delivery services.

*Discussion:* Strategies for companies to protect against material delays and cancellations.

- *Equipment*.....20 Min

*Topic:* Understanding transportation liability using different types of equipment.

*Discussion:* Pros and cons of third-party transportation services. Liability control methods for transportation operations.

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*Module Completion Total*.....1.5 Hours



## Module 6.1 - Procedural Operation

Day 2: 1:15pm – 2:45pm

- *Building Processes*.....20 Min

*Topic:* How to assign different portions of the building operation into phases of completion. Incorporating phases into systems that increase productivity efficiency.

*Discussion:* Using phases to organize and breakdown the building operation into micro step processes.

- *Employee Management*.....25 Min

*Topic:* Creating a work environment where employees can grow to their full potential. How offering employee benefits affects the total price of contracts.

*Discussion:* Using employee handbooks to clearly state company expectations of staff members. Creating and writing company policy and guidelines for employee handbooks.

- *Conduct and Ethics*.....15 Min

*Topic:* Creating codes of conduct in the employee handbook for company staff to follow and reference. Writing ethical conduct that protects company liability, clients, and employees.

*Discussion:* How codes of ethical conduct improve efficiency and effectiveness of the business operation.

- *Safety*.....30 Min

*Topic:* Incorporating safety measures and standards in the company workplace. Setting clear disciplinary action for inability to follow written safety protocol.

*Discussion:* Understanding safety and the requirements for a safe work environment. Consequences of neglecting to follow company safety protocol.

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*Module Completion Total*.....1.5 Hours

## Module 7.1 - Managerial Accounting

Day 2: 3:00pm – 4:30pm

- *Types of accounting*.....10 Min

*Topic:* Cash VS. Accrual Methods in accounting and understanding the differences between the two.

*Discussion:* Pros and cons between the two so contractors can practice the method that best benefits their organization.

- *Revenue, expenses, profit*.....40 Min

*Topic:* Calculating necessary revenue using forecasting with understanding on tracked expenses and calculated profit for operations. Identifying different types of tracked expenses and how to differentiate them for taxation and scaling different procedures within the business operation. Gross VS net profit and how to properly tax or expense the different profits in the accounting process for taxation recording.

*Discussion:* Understanding when and how to use different profits for maximum expansion considering the burden of taxation. How to scale profits and eliminate waste within the business operation using forecasting and policy.

- *Accounts payable/receivable*.....20 Min

*Topic:* Structuring the right system for recording and tracking multiple additions and expense accounts for taxation.

*Discussion:* Using software systems to automate business administration demands

- *Accounting systems*.....20 Min

*Topic:* Incorporating accounting software with CRM programs and banking systems.

*Discussion:* Software compatibility for reporting

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*Module Completion Total*.....1.5 Hours

Module 8.1 - Business Law

Day 3: 9:00am - 10:30am

- *Contractual Agreements*.....20 Min

*Topic:* Creating and using contracts to complete legal binding agreements. How to identify and write terms and conditions of agreements that are negotiated between two parties. Breach of contract and right to cure.

*Discussion:* Using contracts for protection

- *Licensing*.....20 Min

*Topic:* Providing and correctly charging for licensed services. Consequences of providing licensed services without a proper license. Legal responsibilities when entering a contract and how to write terms and agreements that benefit and protect both parties.

*Discussion:* Importance of licensing in the construction industry and how to use licensing to sell jobs to potential clients.

- *Insurance*.....15 Min

*Topic:* How to correctly purchase and write different insurance policies to legally cover all business operations.

*Discussion:* Covering your contracting business with custom insurance policies and how to write/build them with your provider.

- *Liens/Notices and Clauses*.....10 Min

*Topic:* Issuing liens and other proper legal notices prior to signing contracts. Writing custom clauses into contracts that provide protection for both parties.

*Discussion:* Why clauses are used for larger jobs to provide better protection for successful job completion. How to use clauses to sell jobs and earn client trust during the contracting phase.

- *Warranty*.....15 Min

*Topic:* How to identify and write warranties into the contract to protect against future project failure.

*Discussion:* Pros and cons of offering a warranty and how to decide if one will be offered in the contract.

- *Scope of Work*.....10 Min

*Topic:* How to write a scope of work that will properly reflect the actions that will be performed within a specified written contract.

*Discussion:* The benefits and value that a well written scope of work will provide. Using a scope of work to provide protection against fraud.

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*Module Completion Total.....1.5 Hours*

**Module 9.1 – Taxation**  
*Day 3: 10:45pm – 12:15pm*

- *Employer and Employee Taxes.....20 Min*

*Topic:* Company responsibilities of paying employee wages, benefits, and taxes.

*Discussion:* Understanding different types of employer taxes to pay and how to outsource with accurate reporting to agencies.

- *Accounting and Tax Software.....15 Min*

*Topic:* Understanding which accounting and tax software to choose that best benefits your contracting business.

*Discussion:* Using accounting and tax software that is compatible with each other.

- *CRM Incorporation and Management.....35 Min*

*Topic:* Understanding what customer relationship management software is and how to utilize it in your contracting business. How to incorporate CRM software into compatible accounting software for tax reporting and filing.

*Discussion:* The importance of software compatibility when using multiple platforms

- *State and Federal Reporting and Filing.....20 Min*

*Topic:* Understanding reporting company financials to IRS and State. Preparing tax statements using tax software to file or how to outsource this service.

*Discussion:* Knowing when to outsource Benefits of working with CPA firms to help filing

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*Module Completion Total.....1.5 Hours*

## Module 10.1 - Content Marketing

Day 3: 1:15pm – 2:45pm

- *Content Development and Creation*.....20 Min

*Topic:* Using current technology to develop company content for commercial use. Using created content to capture and grow a newer audience.

*Discussion:* Creating interactive content that results in new client engagement and acquisition.

- *Website Development with Interactive Content*.....25 Min

*Topic:* Designing and developing an interactive website for online content display. Understanding email marketing and other added features complementary to your custom website.

*Discussion:* How to develop interactive content that leads to customer acquisition and retention.

- *Social Media Management*.....20 Min

*Topic:* Using social media to grow and expand business operations. Engaging with audience to spread awareness of current business opportunities and other community events.

*Discussion:* Developing strategies to sell goods and services online using created content.

- *Content Marketing Campaigning*.....25 Min

*Topic:* Creating paid marketing campaigns using social media and other digital information distribution systems.

*Discussion:* Identifying ideal clientele using target marketing campaigns.

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*Module Completion Total*.....1.5 Hours

## Module 11.1 – Business Administration

Day 3: 3:00pm – 4:30pm

- *Human Resource Development*.....15 Min

*Topic:* How to form administration teams using prescreening, education, and experience requirements.

*Discussion:* Providing different employment pay structures for prime candidate retention.

- *Operation Management*.....20 Min

*Topic:* Selecting building foreman based on education and prior project management experience. Providing different pay incentives for employment retention.

*Discussion:* Creating a work environment that provides long term employee incentives, employment protection, and planned retirement.

- *Business Payroll*.....15 Min

*Topic:* Using accounting software to program company payroll and ways to outsource accounting services. Benefits and risks of using third party accounting services.

*Discussion:* Understanding workman’s compensation and unemployment insurance. Reporting company tax information to IRS and Department of Revenue.

- *Company Finance*.....10 Min

*Topic:* Understanding self-financing options for expansion. Using credit and how to establish company lines of credit. Creating and running fundraiser opportunities for community events and capital growth.

*Discussion:* building shoestring budgets and applying personal finance options for start-up ventures. Benefits and risks of offering credit to clientele.

- *Marketing*.....15 Min

*Topic:* Developing custom marketing content that promotes company products and services. How to use social media to engage with audience and capture target market.

*Discussion:* Why marketing is critical for business expansion and branding.



- *Promotion*.....15 Min

*Topic:* Planning, creating, and executing promotional events for new client acquisition and existing client retention.

*Discussion:* How to use promotional events to gain awareness and build an audience to new products or services.

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*Module Completion Total*.....1.5 Hours



## ***OSU and LBCC Campus Course Schedule***

### ***Day 1 - Friday 2:00pm-7:00pm***

Module 1.1: 2:00pm - 3:30pm

Break 3:30pm - 3:45pm

Module 2.1: 3:45pm- 5:15pm

Break 5:15pm - 5:30pm

Module 3.1: 5:30pm - 7:00pm

### ***Day 2 - Saturday 9:00am - 4:30pm***

Module 4.1: 9:00am - 10:30am

Break: 10:30am - 10:45pm

Module 5.1: 10:45pm - 12:15pm


Lunch 12:15pm - 1:15pm

Module 6.1: 1:15pm - 2:45pm

Break 2:45pm - 3:00pm

Module 7.1: 3:00pm - 4:30pm





***Day 3 - Sunday 9:00am - 4:30pm***

**Module 8.1: 9:00am - 10:30am**

**Break: 10:30am - 10:45pm**

**Module 9.1: 10:45pm - 12:15pm**

**Lunch: 12:15pm - 1:15pm**

**Module 10.1: 1:15pm - 2:45pm**

**Break: 2:45pm - 3:00pm**

**Module 11.1: 3:00pm - 4:30pm**

***Day 1-3 Course Completion Certificate Total CEH Hours: 17 Hours***

***After successful completion of each Module. Students will be given a certificate of completion that demonstrates the knowledge learned throughout our course series. This certificate can be used for CCB and LCB Continuing Education Hours (CEH) in Oregon. Our course completion certificate will be worth 17 hours of continuing education hours and is the completion certificate for this course.***



***Oregon State Construction Licenses:***

- C.C.B: 214247
- L.C.B: 16032
- L.C.B Business License: 100051

***American Trade Secrets Oregon State Continuing Education Production Crew:***

***Executive Producer: Dain Paul Dejong-Stothoff***

***ATS Webcast: Larissa McCormick - Hayli Peterson - Cameron Stothoff - Sydney Gordon***

***R.M.I: Dain Paul Dejong-Stothoff***

***Online Trade School: [americantradesecrets.com](http://americantradesecrets.com)***