

November 20-22, 2024 | Dallas, TX  
www.advancing-mep-estimating.com

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REGISTERING  
BEFORE  
NOVEMBER 19



# Advancing MEP Estimating <sup>2024</sup>

## Enhancing Competitiveness in MEP Systems Estimates to Win Work & Drive Profitability

### Expert Speakers Include:



**Sean Haynes**  
Senior Sales &  
Estimating Manager  
**TDIndustries**



**Henry Nutt III**  
Preconstruction  
Executive  
**Southland  
Industries**



**Mel Barrett**  
Chief Conceptual  
Estimator  
**Helix Electric**



**Tim Huff**  
Chief Estimator  
**Nashville Machine  
Co**



**Darryl Wood**  
Vice President of  
Preconstruction  
Services  
**Adams Electric**



**Bill Gensky**  
Senior Estimator  
**MMC Contractors**

Proud to Partner With:



## Drawer AI

# Build the Estimating Capacity & Processes for a Booming Industry

## What our speakers have to say:

“This is the only seminar that I have attended with such a specific focus on MEP estimating.”

**Director Estimating, Superior Electric Great Lakes Co.**

“It was a really collaborative conference that involved discussion and lessons from both, MEP/E subs, General Contractors and Engineering firms.”

**Senior MEP Estimator, Mortenson Construction**

The boom in Data Center, Manufacturing and other complex MEP project types is a huge opportunity for contractors, but accelerated schedules, incomplete design documents, supply-chain fluctuations, and shortage of labor are stretching estimators' ability to maintain quality, accuracy and competitiveness.

Returning for its second year to unite 100+ estimating and preconstruction professionals from North America's top MEP firms, **Advancing MEP Estimating** is the premier forum to join forces to improve your estimating capacity and strive for high quality, competitive and accurate estimates.

Move beyond simply compiling budget to add value and win work and join peer-led workshops, presentations and panels that deliver practical insights to enhance cross-stakeholder collaboration, improve conceptual and detailed estimates, harness automation and AI to unlock capacity.

## KEY BENEFITS OF ATTENDING



### Ensure Accurate Cost Projections & Project Scope

Hear how experts in the room are enhancing clarification in scope and specification with project partners, defining what good looks like to build robust relationships that foster trust, prevent rework, and improve accuracy of bids.



### Improve Precision & Reduce Estimate Iterations

Optimize your internal processes, tech stack, and emerging technologies to boost productivity, efficiency, and accuracy in your estimates, closing the gap in cost variance from initial bids through to project delivery.



### Increase Bid Volume & Win Rate

Delve into how you better analyze past project performance to target the right projects for your firm. Discover how top MEP firms are going beyond sheer volume and investing to understand where and how to target the right projects, win the right work and accelerate company growth.



### Expand Your Team's Capacity

Participate in our Pre-Conference Workshop Day to learn how industry leaders attract, hire, and retain top estimating talent. Discover strategies to upskill your team and address labor and capacity challenges, enhancing your ability to seize external opportunities.



### Forge Lasting Connections with Fellow MEP Estimators

Over the course of three days, you'll have access to 20+ hours of networking sessions, audience discussions, and panel talks. Connect, collaborate, and engage with like-minded MEP estimating professionals to address the challenges and define the solution to enhance accuracy, capacity & profitability.

# Your Expert Speakers



**Sean Haynes**  
Senior Sales &  
Estimating Manager  
**TDIndustries**



**Henry Nutt III**  
Preconstruction  
Executive  
**Southland Industries**



**Mel Barrett**  
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Vice President of  
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**Adams Electric**



**Bill Gensky**  
Senior Estimator  
**MMC Contractors**



**Fred Park**  
Director of  
Preconstruction  
**Fisk Electric**



**Paul Martin**  
Construction Estimating  
& Analysis  
**University of  
California**



**Jason Felts**  
Preconstruction  
Southeast  
**Icon Mechanical**



**Jeffrey Campbell**  
Director of  
Preconstruction  
**Cleveland  
Construction**



**Clay Young**  
Director of  
Preconstruction  
**Falcon Contractors**



**Warren Neubauer**  
Senior MEP Estimator  
**Mortenson**



**Ryan Bosworth**  
Director of Estimating  
**Icon Mechanical**



**Trent Brunner**  
MEP Estimator  
**Mortenson**



**Alec Hoffman**  
Lead Estimator  
**Aldridge Electric**



**Wendy Montgomery**  
Director of Talent  
Management  
**Southland Industries**



**Kyle Homlms**  
Preconstruction  
Manager  
**Southland Industries**



**Tom Matus**  
Strategic Growth  
Manager  
**Helm Group**



**Vlad Razumovich**  
Preconstruction  
Manager  
**Amazon**



**Kathy Grieger**  
Chief Estimator  
**Hunt Electric**



**David Barnett**  
Recruiting Manager  
**Amteck**



**Bob Hall**  
Estimator  
**Drawer AI**

# Pre-Conference Workshop Day

## Wednesday, November 20

Check-In & Networking

12.00

### Workshop A

1.00

#### Building Internal Training Programs to Improve Estimation Capacity, Whilst Staying on Top of Project Demand

Join Southland Industries to discover how to enhance your organization's estimation capabilities. Learn key principles for creating a robust training program that drives standardization and efficiency. Don't miss this chance to boost your team's performance and stay competitive.

Join this workshop to:

- Identify the core principles of a robust training program to create organizational standardization
- Build in field experience to help develop junior estimators into a experts
- Adapt training means and methods to diverse learning styles for improved retention

#### Workshop Leaders



**Henry Nutt III**  
Preconstruction  
Executive  
Southland  
Industries



**Wendy Montgomery**  
Director of Talent  
Management  
Southland  
Industries

Afternoon Refreshments

3.00

### Workshop B

3.30

#### Optimizing Recruitment & Retention Strategies to Maximize Team Capacity & Stability

Explore effective strategies for attracting and retaining top talent. Learn how to implement progression plans, strategic bonuses, and remote work options to create a compelling work environment. Don't miss this opportunity to strengthen your team's capacity and stability.

Join this workshop to:

- Implement progression plans, strategic bonuses, and remote work options to attract and retain long-term talent
- Collaborate with HR to create appealing job descriptions and build relationships with local trade schools and colleges to elevate estimating as a career
- Improve employee retention by aligning with personal goals, while understanding the impact of company culture on retention

#### Workshop Leader



**David Barnett**  
Recruiting  
Manager  
Amteck

End of Pre-Conference Workshop Day

5.30

# Conference Day One

## Thursday, November 21



7.00 Check-In & Networking

8.00 Chair's Opening Remarks

### Building Transparency with General Contractors



**Warren Neubauer**  
Senior MEP Estimator  
**Mortenson**

8.10 **Enhancing Clarification of Scope & Specification with General Contractors to Improve Accuracy of Estimates**

- Improving information sharing during the preconstruction phase to define responsibility and establish a complete price
- Exploring how contract type can impact scope, expectations and routes to collaboration
- Enhancing client-focused communication and specification clarity on project requirements to accurately fulfill client demands



**Trent Brunner**  
MEP Estimator  
**Mortenson**



**Tom Matus**  
Strategic Growth Manager  
**Helm Group**

8:50 **Explore how AI Software Can Propel Your Estimating Process to Greater Efficiency & Accuracy**

- Explore how AI is currently shaping MEP Estimating, giving you a clear understanding of current uses and advantages
- Uncover the full range of AI advantages, helping you optimize performance and increase quality across estimates.
- Identify upcoming AI integration challenges, equipping you with strategies to future-proof your operation



**Bob Hall**  
Estimator  
**Drawer AI**

9.20 **Panel Discussion: Exploring What General Contractors Want to See in a Competitive Bid to Define Winning Criteria**

- Gain insights into GC needs and priorities to tailor bids that meet their specific requirements
- Create and communicate value adding actions to differentiate your proposals
- Define the differences between a winning bid and a losing bid in the eyes of a GC to establish decision criteria



**Fred Park**  
Director of Preconstruction  
**Fisk Electric**



**Clay Young**  
Director of Preconstruction  
**Falcon Electrical Contractors**



**Jeffrey Campbell**  
Director of Preconstruction  
**Cleveland Construction**



9.50 Morning Refreshments & Speed Networking

### Improving Standardization Across Estimates

10.30 **Audience Discussion: Unravelling the Evolution of Estimates to Better Mitigate Fluctuating Costs**

- Maintaining accuracy across multiple iterations, ensuring alignment between initial estimates and final costs
- Managing fluctuating material costs, inconsistent equipment pricing, and increased labor costs
- Defining the balance between contingency planning and pricing yourself out of the competition



**Kathy Greiger**  
Chief Estimator  
**Hunt Electric**

11.10 **Assessing Internal Quality Processes to Ensure Consistency in Estimating Standards**

- Developing frameworks, templates and SOPs to streamline and standardize the estimating process
- Identify key checkpoints and review stages crucial for enhancing estimation accuracy of your team
- Strategies for maintaining quality standards across larger and expanding estimating teams

# Conference Day One

## Thursday, November 21



11:50 **Networking Lunch**

### Propelling Design Outputs



**Darryl Wood**  
Vice President  
Preconstruction  
Services  
**Adams Electric**

12.50 **Streamlining Collaboration with Engineers on Design-Assist & Design-Build Projects to Improve Project Outputs**

- Improving information sharing, workflows and data sharing practices in DD stage to enhance the accuracy of project estimates
- Integrating VDC, BIM, engineers, and estimators to streamline operations and ensure clarity in project execution
- Analyzing relationship dynamics and challenges in creating complete drawings across Design/Assist and Design/Build Projects to become the partner of choice



**Alec Hoffman**  
Lead Estimator  
**Aldridge Electric**

1.30 **Conducting Effective Constructability Reviews with Design Teams to Reduce Error & Prevent Rework**

- Develop robust processes to pinpoint and resolve conflicting issues within schematic designs, thereby reducing the need for rework
- Define an efficient RFI process that fosters a collaborative relationship and proactively addresses design ambiguities early on
- Elevate how estimators can offer value engineering to consider additional contextual and environmental requirements to provide expertise to designers



2.10 **Afternoon Refreshments & Networking**

### Improving Early Estimates

2.50 **Audience Discussion: Mitigating Supply Chain Challenges to Enhance Estimate Accuracy**

- Explore strategies to address supply chain issues early without jeopardizing project costs
- Define methods to receive precise information from suppliers for accurate estimating
- Break down trade-specific challenges and cultivate collaboration to improve clarity, alignment, and estimate accuracy



**Jason Felts**  
Preconstruction  
Southeast  
**Icon Mechanical**

3.30 **Mastering the Art of Conceptual Estimating to Create Accurate & Reliable Estimates**

- Developing a comprehensive understanding of your client and market to accurately define the scope of work
- Discover tools for take-offs and quantity surveys, and use historical data for reliable estimates with limited information
- Explore practical strategies for managing high-level pricing and budgeting with minimal information



**Ryan Bosworth**  
Director of Estimating  
**Icon Mechanical**

4.10 **Chair's Closing Remarks**

4.20 **End of Day One**

# Conference Day Two

## Friday, November 22



8.00 Check-In & Networking

8.30 Chair's Opening Remarks

### Harnessing Technology



**Paul Martin**

Construction Estimating  
& Analysis  
**University of  
California**

8.40

#### Investigating the Potential & Pitfalls of AI Application to Improve MEP Estimating Practices

- Diving deeper into the evolution of AI to establish how it can create efficiencies for quantity takeoff, data analytics, document review and generation
- Establishing best practice in data collection and management to prepare for AI
- Evaluating the challenges in utilizing AI for MEP estimating systems to better enable the future of technology



**Kyle Homlms**

Preconstruction  
Manager  
**Southland Industries**



**Bill Gensky**

Senior Estimator  
**MMC Contractors**

9.20

#### Fireside Chat: Assessing Your Tech Stack to Create Efficiencies in Estimating Processes

- Assessing inefficiencies and gaps in current software to develop strategies for optimization and mitigation
- Understanding which integrations work well together and identifying those that don't
- Evaluating current use of processes and best practices to understand whether investment in training or technology is the solution to improving efficiency



**Sean Haynes**

Senior Sales & Estimating  
Manager  
**TDIndustries**



10.00 Morning Refreshments

### Improving Quality & Winning Work

11.00 Tracking Completed Projects & Lost Bids to Improve the Feedback Loop, Optimize Bids & Win More Work



**Tim Huff**

Chief Estimator  
**Nashville Machine**

- Establishing a process of collecting customer feedback on bids to establish future estimate improvements
- Analyzing actual costs from completed projects to track accuracy
- Using market analysis as a tool to navigate the market pricing sensitivity to influence competitive bids

11.40 **Audience Discussion: Building Trust with General Contractors to Foster a Robust Long-term Relationship That Enhances Collaboration**

- Identifying ideal partners who value trade expertise and promote transparent communication for enhanced project outcomes
- Managing MEP/GC dynamics: ensuring transparency and meeting expectations in freecon phase to secure contracts
- Learn how to build trust prior to a contractual agreement to foster stronger relationships and win more work



12.20 Networking Lunch

# Conference Day Two

## Friday, November 22

### The Future of Estimating

 <b>Mel Barrett</b> Chief Conceptual Estimator <b>Helix Electric</b>	<b>13.20</b>	<b>Case Study: Policy Development &amp; Modernization of Estimates for Complex Projects</b> <ul style="list-style-type: none"><li>• Explore complexities in estimating for projects like data centers, renewable energy, and infrastructure</li><li>• Improve estimate accuracy in large-scale projects with evolving facility requirements</li><li>• Harness emerging technology and data analytics in optimizing estimates for complex and fast-paced projects</li></ul>
 <b>Vlad Razumovich</b> Preconstruction Manager <b>Amazon</b>		

- 2.00 Audience Discussion: Understanding Regional Variances to Create Tailored & Accurate Estimates**
- Understanding how regional factors such as labor costs, material availability, and regulatory requirements impact estimating practices
  - Explore the impact of market vertical and geographic location on estimating methodologies and processes
  - Assessing differences in attracting, retaining and training employees from varying regions to compete with the local market standards

**2.40 Chair's Closing Remarks**

**2.50 End of Conference**

▀▀ It was a good chance to have open discussions with trade peers about information that is normally guarded with local competitors. ▀▀

Senior Electrical Estimator, **Granger Construction**

▀▀ The interaction was great and provided a lot of information from different perspectives! ▀▀

Senior MEP Estimator, **Hunt Electric Corp.**



## Connect with MEP Leaders Investing in Estimating Innovation

With growing demands stretching internal capacities, MEP estimators risk losing work or compromising quality.

Our audience of 100+ MEP Estimating decision-makers are prioritizing their search to identify and invest in new technologies that can help them to collaborate both internally and across project partners, leverage automation and AI in takeoff to expand capacity and improve accuracy of bids to secure more work.

Our audience is interested in:



Estimating & Takeoff Software



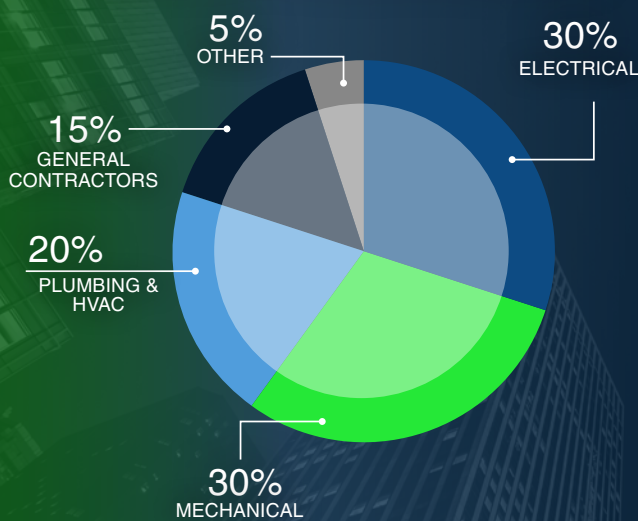
Bid Management Platforms



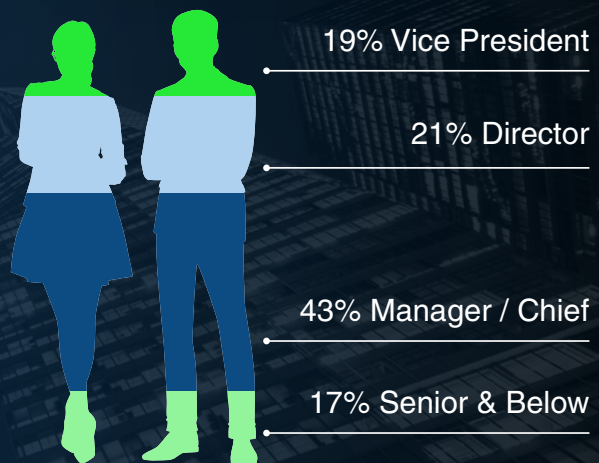
Preconstruction Solutions

Position your company as the partner of choice, drive engagement and build partnerships to expand your market footprint.

### COMPANY TYPES ATTENDING



### SENIORITY OF ATTENDEES



## GET INVOLVED



Megan Poole  
Partnerships Director  
Tel: +1 617 455 4188  
Email: [sponsor@hansonwade.com](mailto:sponsor@hansonwade.com)

# Ready to Register?

## 3 Easy Ways to Book

-  [www.advancing-mep-estimating.com/take-part/register/](http://www.advancing-mep-estimating.com/take-part/register/)
-  Tel: +1 617 455 4188
-  Email: [construction@hansonwade.com](mailto:construction@hansonwade.com)

- 1 Discover** how industry leaders track success to target bids and win more work
- 2 Harness** new technologies, systems, and products to level up your estimating potential
- 3 Learn** how to mitigate fluctuating project costs to improve accuracy in estimate iterations

## Secure Your Place Now

Contractors, Designers & Clients	Register by November 19 & Save \$100	On the Door
Conference Only	\$1,999	\$2,099
Full Access Pass (Conference + Workshop Day)	\$2,298	\$2,398

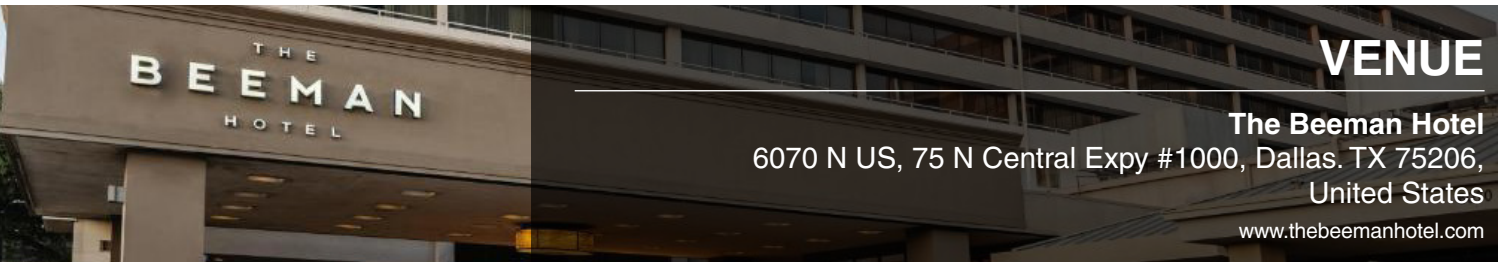
Software, Tools & Solution Providers	Register by November 19 & Save \$100	On the Door
Conference Only	\$2,999	\$3,099
Full Access Pass (Conference + Workshop Day)	\$3,458	\$3,648

Please visit the website for full pricing options or email [construction@hansonwade.com](mailto:construction@hansonwade.com)  
All prices shown in USD.

## Team Discounts\*

- 10% discount – 3 Attendees
- 15% discount – 4 Attendees
- 20% discount – 5+ Attendees

Make the most of **the summit** by attending with colleagues or registering your team. By attending as a group, you and your colleagues can make the most of the pre-conference workshops and networking sessions to ensure you leave with valuable connections and actionable insights.



## VENUE

**The Beeman Hotel**  
6070 N US, 75 N Central Expy #1000, Dallas, TX 75206,  
United States  
[www.thebeemanhotel.com](http://www.thebeemanhotel.com)

### TERMS & CONDITIONS

Full payment is due on registration. Cancellation and Substitution Policy: Cancellations must be received in writing. If the cancellation is received more than 14 days before the conference attendees will receive a full credit to a future conference. Cancellations received 14 days or less (including the fourteenth day) prior to the conference will be liable for the full fee. A substitution from the same organization can be made at any time.

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