



News Briefs

January 2004

Welcome Kolosso Toyota

We are pleased to introduce our newest member, Kolosso Toyota of Appleton. Founded by Robert J. Kolosso Jr. in 1949, the business is now run by three of his six children. Bill Kolosso is general manager. Barb Kolosso is office manager. Pete Kolosso is the parts and services director.

Kolosso Toyota is a new car dealership, providing sales, service, parts and auto collision services. Their expanded facility on Wisconsin Avenue is very customer friendly, including work stations with Internet access for customers and a play room for children. Bill, Barb, and Pete were introduced at the December 2 program at Butte des Morts Country Club. If you didn't have an opportunity to introduce yourself to them, please do so at the January 20 program.

Joe Verhagen of Larry's Markets, Inc. referred Kolosso Toyota to us and will be the member buddy for their first year of membership. Thanks, Joe.

Disasters Come in Many Varieties: Planning for the Unknown

January 20, 2004
Liberty Hall, Kimberly

Disaster is defined as a sudden or great misfortune. Such a misfortune has caused businesses to fail or to be sold. However, such misfortune doesn't have to lead to these ends. With significant planning, a business can recover and remain vital. Such planning is the focus of this workshop.

Laura Leitzinger has had the good fortune of developing excellent business continuity and disaster recovery plans for Oppenheimer Funds. Since September 11, 2001, with Laura's guidance, Oppenheimer has implemented their plans for several dif-

ferent disasters. As a business that relies on real-time, on-line transactions and electrical power, their disaster and recovery plans are very critical.

On September 11, 2001, Oppenheimer's plan got 600 people successfully out of the Twin Towers in New York City and had them operating the next morning. Subsequent to that, Oppenheimer was one of many companies that experienced the large grid electrical outage on the East Coast that effected their New York offices and a significant snow storm that caused a power outage for their Denver offices.

Laura will walk us through the planning process with guidelines and experiences to help each business determine how to measure risk and plan appropriately.

After working through business continuity planning with Laura, participants will be introduced to several other disaster planning cases by Pam Baumann and her daughter Lisa Powers, PAMCO and Career Options, respectively.

Pam and Lisa will help us understand the significant effect that a owner/president's incapacitating personal accident can have on a small family business. They will relate their experience, sharing what they learned along the way that is transferable to other family businesses.

Pam and Lisa will also provide insights into how to plan for other disastrous situations:

- When key employees become your competitor
- Getting through an embezzling nightmare
- Reinventing yourself after burn-out
- Accidents can also be opportunities
- Diversifying your business, and
- Planning for future success and retirement.

Reservations for this practical and relevant workshop are due by **January 12**. We encourage you to bring all appropriate business associates to this workshop and learn how to protect your family business. Even if you think your plan is perfect, you will want to hear about these plans and experiences.



A Potpourri of Critical Legal Issues for the Family Business

Six McCarty Curry Wydeven Peeters & Haak, LLP attorneys, Forum sponsors, led an excellent workshop on legal issues at Butte des Morts Country Club on December 2, 2003. As one member commented, what an excellent value it was to attend and get relevant questions answered by the experts at “no charge”.

Following a plenary session on estate planning, participants met in small groups of their choosing to acquire guidance and answers to their specific questions.

John Russo led the discussion of Buy/Sell Agreements. One participant from that session said, s/he “developed a should do list” based upon that discussion. Another said that until this session s/he “did not fully understand outs.”

Jennifer Koeppel and John Esler, who led the plenary session, also led the advanced estate planning sessions. Several participants commented on the value of this session, saying it was “good productive casual interaction”, “casual discussion of topic with real life situations”, and “excellent advice”.

Kurt Wanless led the sessions on employment law. The evaluations commented that Kurt provided “very useful information”.

Scott Barr and Christine Wanless offered information on buying and selling businesses (or parts thereof). Participants said, “it was good to hear the process”, “just getting the steps involved was helpful”, and the “printed materials” they provided were very much appreciated.

Scott and Christine also led a session on legal issues in contracts and negotiations. It was noted that this is knowledge that is needed every day in one way or another. Again, the session provided “very beneficial information for the current and future contract developments”, according to a member.

We thank McCarty Curry Wydeven Peeters and Haak, LLP for the development time and presentations of all these experts. As one of the Forum’s founding sponsors, MCWP&H continues to be an excellent resource, providing terrific value to Forum members!

Managing Change in the Family Business

March 10, 2004

7 am—3 pm, Liberty Hall, Kimberly

Change is critical for growth of an individual, a family, and/or a business. And, change is cited as one of the leading causes of distress. I have been told that the sweetest and best grapes are those that are

in a big bunch. While experiencing stress and pressure from the surrounding grapes, they mature into grapes with great character. I think that’s also true for our families and our businesses. Character is developed through the process of change and related stress.



But, sometimes the changes in our lives and businesses can become overly uncomfortable or detrimental, making it difficult to manage well.

Bob Shaver, faculty associate with Executive Education, UW-Madison School of Business, will lead this workshop. Bob is in demand throughout the Midwest for his customized, in-house training programs. Some of his clients include the American Bar Association, Caterpillar, Elkay Manufacturing, P.H. Glatfelter Paper, Promega, and Swiss Colony.

Bob uses a training approach which he calls *directed reflection on experience*. Through creative exercises and discussions, Bob helps leaders and businesses learn to implement improved management practices.

In this workshop for family businesses, Bob will provide the fundamentals of change management in the morning and lead the development of implementation strategies following lunch. Members and sponsors are encouraged to reserve the entire time—7 am to 3 pm—for this outstanding workshop.

Member News

Badger Mining Corporation’s *Adventure 2003* drew 2,300 people this year. According to the article by the Blair Press, “Some came for the fun of running big equipment or playing in the sand.” The event, held at Badger’s Taylor facility, raised money for Taylor Parks and Recreation and for Jackson County Outreach. The event helped everyone “learn about the sand that is mined at Taylor, and how it is used in gas, oil, and other industries.”



Affinity/Peer Group Meetings

Successors Group:

The successors were transported to Badger Mining Corporation on November 18 by Kobussen Buses Ltd. for a meeting focused on leadership development. Tim and Vicky Wuest, our hosts, explained the leadership development process their business implemented over the course of at least 18 months. They gave considerable credit for the development and success of the program to Dale Feinauer and B.S. Sridhar of the College of Business at UW Oshkosh.

The objective of Badger Mining’s program was to identify and begin grooming future leaders for Badger Mining.

After explaining their process, they led us in the introductory session of their training program, “21 Indis-

pensable Qualities of a Leader” based on the work of John C. Maxwell. The successors jumped into the training, sharing their experiences, questions, and comments.

Thanks to Tim and Vicky Wuest for leading and hosting this meeting. Thanks also to Joe and Dan Kobussen for providing the transportation.

The **next meeting** of the Successors group will be January 27 at Meyer Services, Appleton.

Best Practices:

The next meeting of Best Practices is being planned for mid-February by Jerry Mader, publisher of The Business News, the Forum’s associate sponsor. Members are currently responding to Jerry’s suggested session topics to determine the session focus.

All member businesses are encouraged to participate in the Best Practices and/or the Successors groups as part of Forum membership. Registrations for specific meetings are required so that the Forum can provide an appropriate meeting space, necessary materials, and, in the case of Best Practices, the host business can provide a working lunch.

Registrations can be sent to Ann Stein at (920) 424-1541 or steina@uwosh.edu.

Programs for 2004-2005

On December 9, the Program Committee met to continue work on this year’s program details and to make some decisions for next year’s programs.

Here’s a sneak preview of what is in the works for 2004-2005:

A Tough Nut to Crack—a theatrical presentation about a real family business and the relationship between a father and son. This will help us explore the idea of *leadership styles in a family business*. The production was written by Ira Bryck, director of the family business center at the University of Massachusetts. This is Ira’s third family business play. J.J. Keller has agreed to allow us to hold this performance in their auditorium. Everyone will find this play both enjoyable and thought provoking.

Professors Dale Feinauer and Al Hartman will provide a program on *incentive compensation in family businesses*. The Forum’s compensation survey will be updated and re-distributed to Forum members before the program. The data from the survey will be compiled and used as part of the program.

The committee also plans to have Dean Fowler back to speak to the Forum about *positioning the family business for success*. His program, Seven Habits of Highly Successful Successors will help leaders and the next generation appraise their leadership development and policy needs.

Watch for further information and program dates in the next issue of *News Briefs*.

Forum Website

All the contact information about fellow members and sponsors is now in the Members Only section of the Forum’s website. Please be sure to check out the site (<http://www.uwosh.edu/wbf/>) whenever you want to contact one of your Forum partners.

If you lost your username and password, contact Ann Stein at steina@uwosh.edu.

Wisconsin Family Business Forum Program Calendar – 2003-2004

Date/Time	Topic/Event	Presenter(s)
Jan 20	Disasters Come in Many Varieties: Planning for the Unknown	Laura Leitzinger, <i>Oppenheimer Funds</i> Pam Baumann, <i>PAMCO</i> Lisa Powers, <i>Career Options</i>
Mar 10	Managing Change in the Family Business	Bob Shaver <i>Executive Education, UW-Madison</i>
May 3	8th Annual Dinner: A Family Business Heritage	Craig Culver <i>Culver’s Franchising Systems</i> <i>Culver’s Frozen Custard</i>
June TBD	Timber Rattlers—A Family Outing	Burk Tower <i>College of Business</i> (event coordinator)

Programs Provided by Our Reciprocity Partners

Center for Family Business, Marquette University		
Jan 20	The Power of Planning	Tim Blumentritt <i>Marquette University</i>
Family Business Center, UW-Madison		
Jan 27	Succession Planning for the Succeeding Generation	Dean Fowler, <i>Dean Fowler & Associates</i>

For more information about these programs, contact Sue or Ann.

The Forum thanks the following sponsors for contributing significant value to keep the Forum at the forefront of family business programs, worldwide:



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McCarty Curry Wydeven Peeters & Haak, LLP has been serving the legal needs of large and small family businesses in northeast Wisconsin since 1949. The firm's services include all aspects of business and corporate law, real estate, complex estate planning, commercial and personal litigation, as well as general practice.

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University of Wisconsin Oshkosh, College of Business Administration provides undergraduate and graduate education with a wide array of outreach services to benefit economic development in northeast Wisconsin. The faculty and staff are professionals dedicated to being quality teachers, accessible to students; furthering knowledge through research; and serving as valuable resources to the University and community. A key strength of the College is providing professional expertise through personal contact among students, faculty, and members of the community.



Associate Sponsor:

The Business News is a local business newspaper serving a 10-county area of northeast Wisconsin.



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