



News Briefs

March 2010

Growing Generations of Family Business Success

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Welcome Eden Stone Company, Inc.

Eden Stone Co., Inc. was founded in 1950 by Emil Gesell and his sons, Bill Sr. and Bob. Their current President, Dave Wirtz, and Vice President, Rick Corser, are sons-in-law of the late Bill Gesell Sr. Bill Jr., who is an active board member for the company, retired as President at the end of 2008. In addition to Dave and Rick, four members of the 4th generation are employed and are part of the sales and management teams.

With over 200 employees, Eden Stone operates at 7 quarry locations throughout southeastern and central Wis-



consin. They offer their customers the largest variety of architectural, landscape, veneer and dimensional cut stone products in the region.

Eden Stone and Valders Stone and Marble, a division of Eden Stone, are known for the exceptional quality of the stone they produce.

In 2009, Eden and Valders celebrated 1,000,000 hours without a lost time injury. A milestone in any business. This was a significant accomplishment due to the labor intensive nature of their industry.



Fostering Healthy Communications

March 24, 2010, 1:00—5:00 pm
Butte des Morts Country Club, Appleton
Dean Fowler, Dean Fowler Associates, Inc.

Family communication, the cornerstone for healthy families, can become strained during transition periods in a family business. When managed effectively, family talk can bring about positive growth, new opportunities, and enhance family relations. Individuals and families that can develop functional flexibility have the greatest chance for relational and business survival during difficult periods.

As in competitive sports developing communication skills requires practice and teamwork. Families must practice effective techniques when there is no conflict and crisis so that they are prepared to use these honed skills in time of conflict and crisis.

In this interactive workshop, Dean will use disguised case examples from his family business consulting practice to illustrate how “triangulation” undermines communication, and how “active listening” must be the central skill that is practiced by families to build effective communication. Finally, listening should lead to action which supports the goals and dreams of family members. Small group break-out sessions will give participants the opportunity to practice each of these three core concepts; triangulation, active listening and The Amazing Life™.



This workshop will be valuable for family members as well as non-family executives. Consider bringing your management team.

Dean Fowler is recognized as one of the world's leading experts specializing in the emotional dynamics that impact family members, managers, and shareholders in family enterprises. During the past twenty-five years, he has served over 250 family enterprise clients in both the United States and Europe. Those Forum members who have participated in our previous Dean Fowler workshops will recall that Dean provides relevant information, concrete examples, and useful tools.

14th Annual Dinner—Celebrating a Family's Heritage

Monday, May 10, 2010

5:30—9:00 pm

Bridgewood Resort Hotel, Neenah

Our annual dinner is the culmination of a year of education, networking, problem solving, and sharing that *fosters healthy families and their businesses* throughout northeast Wisconsin. The evening includes a social hour, dinner, recognitions and awards, a family's business journey, and a silent auction to benefit the Forum's scholarship fund.

Knowing that family business owners face similar family dynamics and challenges, and relate well with one another, we invite the leader of a recognized Wisconsin family business to tell us about the challenges and successes the family has faced as it has grown its business.

This year, we are pleased that Dan Ariens, President/CEO of the Ariens Company of Brillion, has agreed to tell his family's story.

Members and sponsors are encouraged to reserve the date on their calendars and to invite family and associates to attend. Watch for the invitations with dinner choices to arrive by the end of March.



Summer Family Picnic Fun

Wednesday, June 23, 2010

5:00—8:00 pm

The Pavilion, Plamann Park, Appleton

Getting together in the summer for an old-fashioned family picnic at Plamann Park is relaxing and fun for the whole family. The Pavilion has a roof for protection for the summer sun/rain. Adjacent to the Pavilion is a children's playground, horseshoe area, volleyball court, and basketball court. There is also a Disc Golf course that runs by.

The Forum provides meat and other essentials. Each family is asked to bring a dish to share. The Forum renowned chefs, Dean Burk Tower and Dan Meyer, will be cooking excellent bratwurst, hot dogs and burgers to sat-

isfy everyone's appetite.

We know summer is a busy time for everyone with sports events, vacations, etc. But, we hope you will be able to reserve this time to attend. It's a great way to get better acquainted with members and sponsors in a casual, fun environment.

Growing the Family Business

On January 26th, ninety-six participants heard the stories of family business growth as told by Tom Fleischman, president of Tom's Quality Millwork and Hardwoods, and Jeff Kirchner, president of Streu's Pharmacy/Bay Natural. Presented in a talk show format with host Thom Cody, these stories illustrated challenges faced, insights gained, and lessons learned.

During small group sessions, participants explored growth issues related to their decision making processes, the biggest hurdles, the impact of growth on their family, resources tapped, risk tolerance, and generating a shared vision.

Talking with many other family businesses about their challenges and experiences was reported to be encouraging and helpful to those in attendance.

Member News

Kim Bassett-Heitzmann of Bassett Mechanical was named Chief Executive Officer and President at the company's annual board of directors meeting. During the past two years as President/COO, Kim assumed responsibility of day-to-day operations from **Bill Bassett**, chairman of the board. The Forum has been honored to be a part of Bill's and Kim's succession process. Congratulations, Kim!



Curt Ignacio, COO Marion Body Works recently announced that it is highly likely that they will be hiring and training between 100 and 175 workers because of a recent Oshkosh Corporation contract with the government. They will hire mainly welding and assembly workers who will receive full-time employment with benefits.



Patrick Riordan, president/CEO and Celcom, was elected as an officer to the Cellular Telecommunications and Internet Association's (CTIA) board of directors by fellow board members from around the wireless industry. He also was re-elected as a small carrier representative. Riordan will serve with other telecommunications leaders from across the country. He has been a member of CTIA since 1992 and has served on the board of directors since 1993.



To have your news items included in the News Briefs, send them to the attention of Sue at schierss@uwosh.edu.

Member Column: Gneiser Family Meeting

David Gneiser, President,
Fond du Lac Bumper
Exchange, Inc., Fond du Lac

Katherine Grady was the Forum's presenter on "Governance & Continuity Check Up" on 10/21/09. As with most every Forum seminar, I at least sign myself up, sometimes my wife Lorrie, & usually a couple of our non-family exec's. I know we will always gain something each time we attend a Forum function. A couple of days before the seminar I emailed Sue & Donna to let them know that work had



David & Lorrie Gneiser

overwhelmed us and we couldn't find the margin to attend – I'm sure that many others have felt this same way. Sue responded: "Katherine is doing a business continuity checklist that looks quite useful - business, ownership and family. It seems the focus will be on business continuity in whatever form is best for the business. I am eager to hear what she has to say." Donna then chimed in with: "I know how busy you and Lorrie are, but am looking for another huge favor. Katherine's flight does not leave until 4:50 pm so she would like to have lunch with a member of the Forum following the program. Sue and I immediately thought of you and Lorrie. We think this would be a perfect opportunity for you to have a one-on-one conversation that might help benefit your upcoming family meeting."

No pressure! We decided to attend the seminar & stay late for lunch with Katherine.

Wow! Talk about a seminar and lunch exceeding expectations! We were able to ask Katherine a lot about our upcoming family meeting. She was quite generous with her time. (Stephanie Brun de Pontet spoke 9/17/09 on "Succession Planning-Who Decides What & How" – that initially spurred us to decide to have the meeting.)

Our first-ever family meeting occurred the Saturday of Thanksgiving weekend. Attendees: me, Lorrie, our son Drew, our daughter Sarah, her husband Jacob (he's now 1 of the family!), & our daughter Emily.

The meeting went well, even exceeding our expectations. It lasted about 4 hours and ended with some fun – we took them out (on the business!) to a favorite Mexican restaurant. We tried to make sure that we didn't overwhelm them with too much information & too much data. Thankfully it seemed that we struck the right balance.

We started off by sharing the company history...we used an oral version of the "Family Enterprise Timeline" that Katherine had us construct during her seminar. That was good for getting perspective for all as well explaining some of the "patterns" that we've detected in the com-

pany/family history. Some dialogue & questions, but mainly me sharing with Lorrie occasionally injecting observations.

Using the seminar materials, we later showed them the "3 Circle Model" and talked about how that applied to us now as well as past Gneisers. We also showed them the "Developmental Stages of Family Enterprises" and what goes on in the "Transitions" so that they had another perspective on where we are & what's potentially next. I really liked the 2 slides "Requirements for a Successful Controlling Owner Enterprise" & "Requirements for a Successful Sibling Partnership". We went through each of the points, emphasizing how we see how God shaped them & gave them specific talents and how those can be used as sibling owners of this company. It was pretty cool to see their responses to each other. [We don't see any of the children coming back soon to run the business.]

The exciting thing that struck me during the talk was how this (co-owning the business with the right leaders and advisors) could be a very good thing, giving them something to work on together, and a very good reason to stay connected. I realized that had not been the case for my Dad & his siblings, or for me & my cousins, or for me with my brothers. So we've all drifted apart. Nothing in common outside of family (and that has not seemed to have kept us connected very well).

The final part of the meeting was the question: "Do you value the company enough to continue the process of finding out about being owners – that you value it being owned by Gneisers?" All 4 answered "yes"! Lorrie shared that a yes/no answer now didn't mean it was their "final answer" but that we wanted to gauge their interest. She asked, "Considering all that we've shared with you, wouldn't it be easier to outright sell the company and give you your money than to go through the work to transition it?" They agreed that it would be much easier to sell it.

We shared a little bit about our desire to have Katherine assist us in this adventure. We are grateful that Sue asked us to stay for lunch after the seminar. We felt a very nice connection to her and believe that since she has walked with other families through transitions, she would be fantastic in guiding us.

* Contact Donna for audios of previous programs.

Family Business Poll

Now that you read about the Gneiser's family meeting. Go to our home page and let us know how you use **family meetings**.

Results of last poll: Does your business have a formal performance review process for your non-family executives?

Yes—58%; Only for some—5%; Not at all — 37%

After you respond, you can view the results right away by clicking the view results link. And, you can go back at a later time to view the results of the poll.

Family Business Education (FBE) Certificate Program

The FBE class has had four sessions as of the end of February. Topics they have studied include defining the family business, business management, family business governance, and strategic planning in the family business.

During each session, class members have the opportunity to interact with the instructors and their classmates on issues related to the topic and how they perceive the fit in their family business.

The three more class sessions for the year are evolving leadership in the family business; managing culture, change and conflict; and evolving ownership in the family business.

Upon completion of the program on May 12, 2010, the participants will receive certification in family business basics.

We have begun to collect names of those who wish to participate in next year's FBE class which will begin in September 2010. If you want to be on the waiting list, contact Donna Nelson at nelsond@uwosh.edu or 920-424-1541.

Legislative Trip



Due to an inability to find a date that worked for a majority of the interested parties, this trip has been cancelled.

Summer Internships

In the last issue of the Forum's News Briefs, Heather Holly-Pinnow's article described the value Pinnow Sheet Metal received from hiring a student intern, Christina Lahde, for the summer.

In this issue, Christina Lahde shares her perspective on the value of the summer internship.

Christina's wrote, "I am extremely grateful to Pinnow Sheet Metal and the Wisconsin Family Business Forum for the opportunity to pursue an internship this past summer. With the struggling economy and the need to build my resume, searching for a job last spring was one of my top priorities. When I emailed my resume out through WFBF last spring, I wasn't exactly sure if anything would result from it.

When Pinnow contacted me I immediately jumped at the opportunity and am so blessed to have done so. I could not have asked for a better summer job. I worked forty hours a week and for awesome people. Working for Heather and Tim Pinnow was fun and flexible, but most importantly taught me skills I would have never learned in college or outside of this experience.

I created a Disaster and Business Continuity Plan,

revised and renewed their Employee Handbook, transitioned all of the paper filing to computer storage, revised the Job Description Handbook, and created an Employee Performance Review Template. All of these projects and tasks enhanced my understanding of what it takes to run and maintain a business and gave me hands-on learning experiences that I would have never been introduced to in a classroom.

If I were able to give any advice to college students looking for summer internships and jobs, I would tell them not to overlook the small businesses in the Fox Valley. The WFBF is a tremendous resource to find an internship that might have gotten overlooked before; and I personally would like to thank both the Forum and the Pinnows for the opportunity to learn, grow, and work this summer.

If you know someone that would benefit from a summer internship in a family business or sponsor organization, or would like to hire and intern, contact Sue or Donna for details on how to publish your interest.

Rotational Experience Program for Your Next Generation

As members of a family business, you might like to see your next generation get experience outside your business. In fact, some family businesses actually require outside experience before a family member can join the organization. Benefits of this external experience include family members getting a broader perspective on the business world and bringing new ideas back to your business, becoming confident in their abilities through recognition by non-family members, and gaining professional credibility.

The Wisconsin Family Business Forum would like to assist you in coordinating a summer rotational experience for your up and coming leaders. By pooling the resources of our Forum, we could provide a central location for our Forum members to indicate interest in hosting a family member or encouraging one of their own family members to take part in this summer program.

Unlike traditional summer internships, this program would be designed to provide job shadowing and broad exposure to business processes and operations. High school as well as college-age next generation members could participate.

Jessie Pondell, College of Business Internship Director, has offered to assist in developing this rotational program for the Forum. Her knowledge and experience in the development of experiential learning opportunities promise to make this program valuable for our members.

If this is something that your family business is interested in exploring, please contact Donna at nelsond@uwosh.edu or 920-424-1541.

Forum Growth Benefits All

Learning from the experiences of many and varied family businesses is one of the many benefits of Forum membership.

Help us get out the word. Share your Forum experiences with prospective members and sponsors, invite them to be your guests at a program, and encourage them to become a valued member or sponsor of the Forum.

Share your Forum pride by linking to the Forum's website from your website.

As a "thank you" to those members and sponsors who successfully recruit new members, we will provide a discount on their next year's fee.

Unique Member Opportunities

Sadoff & Rudoy Industries (S&R) recently took advantage of the Forum's advertising campaign provided by two Forum members, **JAG Outdoor Advertising** and **Kobussen Buses Ltd.** As a result, S&R received a significant savings on the design and development of a billboard for their Green Bay area location. And, Forum membership is identified.



If you haven't taken the time to review the information, we encourage you to do so. For further information, contact Jane Sweasy, jsweasy@jagoutdoor.com.

J.J. Keller & Associates Inc. saw the recent request for employee manuals that was posted by a member on our List Serv. In response to that request, J.J. Keller is making their Prospera® human resources system available to Forum members at a significant savings. Prospera® has a tool that allows companies to build their manual and is pre-loaded with key policies and procedures. Details of this offer are enclosed in the member/sponsor issue of this *News Briefs*.

For additional details about the system, contact Adam Brouch at J.J. Keller. He can be reached at 800-558-5011 ext. 2284.

Peer Group Calendar

Forum members are encouraged to participate in a peer group. We will be holding an introductory meeting for those interested in learning more about peer groups and participation. Please contact Donna to indicate your interest in exploring group membership.

Group	Date/Time	Location
Non-Family Executives	March 3 8:00—10:00 am	Reeve Union UW Oshkosh
TBD	March 9 1:30—4:00 pm	Tailwind Aviation Green Bay
Generation Now	March 10 1:00—4:00 pm	Meyers Services Appleton
Green Bay Chapter	March 12 7:30—10:00 am	The Business Bank Voyager Dr., Green Bay
TBD	April 13 1:30—4:00 pm	
Senior Executives	April 15 7:30—10:00 am	
Generation Now	April 21 1:00—4:00 pm	
Non-Family Executives	May 5 8:00—10:00 am	Reeve Union UW Oshkosh
Sponsors	May 14 8:00—10:00 am	1 st National Bank Berlin
Senior Executives	May 20 7:30—10:00 am	

Director's Column:

On February 26, staff, members of the Board and committees spent the day defining the primary strategies for the Forum's next several years. Consistent with the Forum's mission, the vision was defined as having multiple generations participating in the Forum and being recognized as the excellent resource for family businesses. Education, networking, participation and retention across generations, and safe environment became the key foci for fulfilling this vision. Based on these foci, three approaches were identified as key: developing meaningful relationships, increasing the number of members participating in peer groups, and developing a clear succession plan for the Executive Director's role.

I want to express my thanks to Thom Cody and Dale Feinauer for facilitating the workshop and to all those who participated.



Sue

Program Calendar—2010

Wisconsin Family Business Forum

<u>Date</u>	<u>Event</u>	<u>Presenter(s)</u>
Mar 24 1:00—5:00 pm	<i>Fostering Healthy Communications</i>	Dean R. Fowler Dean Fowler Associates
May 10 5:30—9:00 pm	<i>14th Annual Dinner A Family Business Heritage</i>	Dan Ariens Ariens Company
June 23 5:00—8:00 pm	<i>Family Picnic at Plamann Park</i>	Program Committee
August 11 8:00—11:00 am	<i>Facilitation Training</i>	Dale Feinauer Faculty Liaison to Forum

Register on-line at <http://wfbf.uwosh.edu> — [Programs/Registrations link](#)

Family Business Center at UW-Madison

Mar 16 8:30—11:30 am	<i>Once Upon a Family Legacy — video stories that spark a path to the future</i>	Kathy Wiseman Working Systems
May 18 8:30—11:30 am	<i>Communicating and Managing Conflict within the Family Business</i>	Deb Houden UW Madison Family Business Center

Register on-line at <http://wfbf.uwosh.edu> — [Alliance link](#)

As a benefit of Forum membership, Forum members may attend UW-Madison Family Business Center programs as part of our reciprocity agreement. Registration for Madison's programs as listed above can be made via their website. Register as a member, indicating Forum membership in the comment section. There is a minimal per person fee.

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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