



News Briefs

November 2006

Combining the *Importance* of business with the *Complexity* of family

Choosing and Using Advisors

December 5, 2006, 8 am—noon
7 am registration, breakfast, & networking
Butte des Morts Country Club, Appleton
Member Panelists: Jane Sweasy & Tom Stark
Sponsor Panelists: Scott Barr & Tom Jacoby
Moderator: Thom Cody

Research shows that family businesses are hesitant, if not resistant, to using outside advisors. Furthermore, it indicates that those family businesses that recognize the need for, and effectively use, outside expertise are more successful.

From the perspectives of a second generation owner, an experienced non-family executive, and two Forum sponsors—a lawyer and an accountant, the panelists will provide guidance for finding, selecting, and managing advisors who will respect your goals and objectives. The presentation will be rich with insights including:

- Types of advisors to consider
- The value advisors add
- Things to consider before bringing in an advisor
- How to find and select the best advisor for your needs
- Getting the most out of the advisor relationship
- Appropriate use of company resources
- Setting expectations and benchmarks
- Controlling the costs
- Recognizing conflicts of interest
- Knowing when the next generation needs their own advisors

Focusing on these issues, panelists will share their experience, significant insights, and cautions.

Program attendees will have an opportunity to share their experiences, pose questions, and dialogue with the panelists and other family business members and sponsors.

NOTE: Each attending business will receive a complimentary copy of *How to Choose & Use Advisors: Getting the Best Professional Family Business Advice* by Craig Aronoff & John Ward.

Registration may be made on our web site—<http://wfbf.uwosh.edu>.

Leveraging Your Strengths as a Leader

About 70 Forum family business owners, managers, advisors, and guests experienced this interactive and motivating presentation by Thom Cody of Pathmakers, Inc. at Butte des Morts Country Club on October 24.

Participants were asked to complete a DISC assessment when they registered for the program. Upon arriving at the program, participants received their DISC results indicating their natural and adaptive leadership styles, which were then referenced throughout the program.

Explaining that there isn't a good or bad style, Thom explained the significant behaviors, motivations, fears, and perceptions associated with each leadership style. He explained that understanding leadership styles and their impact on us and others is crucial to effective leadership.

Through a variety of challenging exercises, Thom guided participants into understanding how various styles interact effectively to accomplish a task or solve a problem.

One of the insights that Thom emphasized was that each person's value lies in "Who I Am" rather than in "What I Know". In parting, he challenged each participant to lead from a position of freedom rather than fear to experience healthy coexistence of success, joy, and family.

Participants said that this was a stimulating session that sent them home with many ideas for improving their leadership and the functioning of their leadership teams.

Green Bay Expansion

On September 26, the Forum introduced the Green Bay area to the Forum. The evening included comments about the essence of family business and keys to success presented by Thom Cody and Burk Tower. Bill Bassett, president of Bassett Mechanical, and Jane Sweasy, president of JAG Outdoor Advertising explained the value the Forum has for their family businesses.

Guests, including family business owners and Green Bay community leaders, talked with current members and sponsors about their businesses and how the Forum might benefit them. Our guests expressed appreciation for this

opportunity to get acquainted, to learn about the Forum, and to meet Forum members and sponsors. Several of the guests subsequently attended the October 24 program to learn more about the Forum.

Thanks to all the Forum members and sponsors who helped to make the evening successful. We also want to acknowledge and thank Schenck Business Solutions for hosting this event at their Green Bay office and for providing an excellent buffet and beverages.

New Associate Sponsor

The Board, at the recommendation of the Recruitment & Retention Committee, has approved SPARK Advertising's application for associate sponsorship of the Forum, effective November 1, 2006. Mark Elliott, president and owner of SPARK Advertising, was introduced to the Forum last year by First National Bank and immediately saw a good fit for his company.

As associate sponsor, SPARK has set objectives to help the Forum meet its goals and will report their progress to the Recruitment & Retention Committee. They will focus on monthly public relations, a communications and services brochure, and a newsletter template.

Please help Mark and his staff feel welcome and help them get acquainted with the Forum.



Scholarship Recipient

Last spring I became the first recipient of the Wisconsin Family Business Forum Scholarship. I wanted to take a few moments to tell you a little about myself and how your generosity is making a difference.



My name is Melissa Schultz and I am currently a senior at the University Wisconsin Oshkosh. I will be graduating in the spring of 2007 with a Business degree in Marketing and with a minor in German. As a full time student at UW Oshkosh, I represent the College of Business as a Student Ambassador, am a member of the Marketing Club, and am the Marketing Intern for Ariens Company in Brillion.

As a senior, my academic schedule is quite strenuous and demanding, leaving very little time or flexibility for earning an income. Being awarded the WFBF scholarship has helped to ease the pressure of the cost of my education, allowing me to focus on my studies and to continue to work toward my goals.

As I get closer to completion of my degree, I realize that I am closer to obtaining one of my key goals; graduating in the top of my class. Earning high marks, along with my determination and persistence will certainly open many doors for me. So once again, let me state that the WFBF scholarship has had an impact on my life and I am extremely grateful!

The Forum was pleased to have Melissa attend part of the October 24 program and hope she can join us again.

Peer Groups

Generation Now group:

This group, formerly known as the Next Generation group, reorganized at their September meeting and unanimously agreed that they are *Generation Now*. That meeting also focused on the topics they wanted to cover for the year, group facilitation, and membership. One of the highlights of the meeting, which was hosted by Dan Meyer at Meyer Services, was the skills test on his excavator.

On October 18th, the group met at Techni-Flex, hosted by Cindy Schneider. Al Hartman led the discussion of "motivating without money".

The November 8th meeting will be hosted by Peter Lang at Lang Oil and will focus on "re-branding your business".

Non-Family group:

On November 2nd, the non-family executives group will meet to discuss "the impact of fear in taking responsibility in a family business". Non-family executives and managers of member businesses who are interested in attending the meetings of this group should contact Sue at the Forum office.

IT Group:

The September 26 meeting of this group focused on how J.J. Keller's IT marketing support group has been planning for the roll out of the next phase of SAP, how their area is organized, and other topics of interest to the attendees.

This group meets quarterly. If you are interested in participating, contact Sue.

Member News

Zuern Building Products

Zuern Building Products was one of the partners in the Extreme Makeover: Home Edition project that will air on ABC on November 19. During the October program, Arleen Mantel, COO at Zuern, described their role in the project. The house was built in Dundee, Wisconsin, in 96 hours during a week laden with thunderstorms. Jennifer Zuern-Grudzinski said, "They came to us knowing that we are community-minded, and have worked with them in similar humanitarian projects in the past, such as the Habitat for Humanity Builders Blitz where 10 homes were built in 5 days for families in need.... It is amazing how helping those in need is such a morale booster. Our employees were walking on air throughout the week, sharing different stories as to how they helped.... Everyone worked with more than their hands, they were working with their hearts and souls. It's something they believe in."

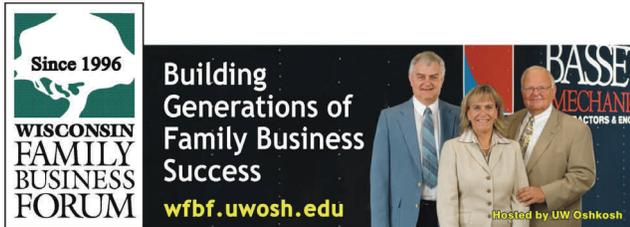


Fond du Lac Bumper Exchange, Inc. supplied volunteer workers to this Extreme Makeover project in Dundee.

Bassett Mechanical was awarded the Fox Cities Manufacturer of the Year award on October 24, 2006.

Zander Press invited Forum members and sponsors to attend two sponsored seminars: *Effective Communication and Dealing with Difficult People*, and *Delivering Superior Customer Service*. Members reported that both seminars were excellent sessions and appreciated Zander's gracious invitation to attend.

Forum Billboard



If you haven't seen the Forum's billboard, take a ride and have a look. The billboard is located at the Wrightstown, highway U, exit off highway 41, on the right side of the highway as you travel south from Green Bay.

We want to thank our member Bassett Mechanical and specifically Jim, Kim and Bill Bassett for agreeing to be on the billboard.

We also thank Jane Sweasy and her associates at JAG Outdoor sign for designing and installing the board, and for contributing the space to the Forum.

This is clearly another example of members wanting to tell everyone about the Forum and their commitment to and growth through it.

Chairperson's Column

Jennifer Koeppel



Over the years, the Forum has operated with a simple policy that guides members, sponsors, guests, and speakers with the phrase, "no active selling at Forum functions." This statement, however, has left both sponsors and members hesitant to discuss their business activities or simply to hand out business cards when requested, which is clearly not our intent.

This phrase is simply meant to remind everyone that the meetings of the Forum are to allow for discussion of sensitive, confidential, and personal matters without concern that these matters would be used as magnets for sales calls. It is not the intent of the active selling prohibition to deny members easy access to the sponsors' or each other's growing expertise and experience in working with families and their business needs. In fact, a big part of the Forum is focused on networking with other family businesses and, indirectly, soft marketing services to fellow members and sponsors.

In drafting this statement to Forum participants, the goal of the Board is to encourage members and sponsors to utilize each other as resources for questions or issues which may arise within our businesses. Therefore, we

would encourage members and sponsors to openly communicate what they do and what services they can provide if they feel these services or products may be of assistance. To help increase awareness of services offered by members and sponsors of the Forum, we encourage you to take advantage of the table display space, which is available to a limited number of displays at each program.

The Forum was formed to help family-owned businesses, the families, and our sponsors grow. If any members or sponsors have questions or concerns regarding the "active sales" prohibition, please feel free to speak with any Board member.

Wisconsin Family Business Forum Program Calendar

2006

Date	Event	Presenter(s)
Nov 8 11 am— 1 pm	<i>Leading Your Organization Through Change Best Practices</i>	Pathmakers
Nov 30	<i>Process Improvement Best Practices</i>	Denny McCullough Schenck Business Solutions
Dec 5 7—noon	<i>Choosing & Using Advisors</i>	Moderated Panel of Owners and Advisors

2007

Jan 25 1—5 pm	<i>Gender Issues: Bringing Out the Best in Sons and Daughters</i>	Tom Jadin
Feb 8 11 am— 1 pm	<i>Terminating Employees Without Litigation Best Practices</i>	Rebecca Kent McCarty Law LLP
Mar 14 7—noon	<i>Harnessing the Power of an Independent Board</i>	Norb Schwarz Family Business Consulting Group, Inc.
May TBD	<i>11th Annual Dinner</i>	
Sep 11 7—noon	<i>Plan Now to Avoid Crisis Clean-Up Later</i>	Bonnie Brown Hartley

UW-Madison Family Business Center

2006

Dec 12 8— 11:30 am	<i>The Next Generation: Its Eight Biggest Challenges</i>	Greg McCann McCann & Associates Consulting
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The Forum thanks the following sponsors for contributing significant value to keep the Forum at the forefront of family business programs, worldwide:



First National Bank — Fox Valley has a competitive advantage of developing strong, close customer relationships, especially in the niche of family-owned businesses. Thanks to a dedicated staff, FNB has completed its 117th year of providing financial services to the people and businesses of the Fox Valley with locations in Appleton, Menasha, Neenah, and Oshkosh.



McCarty Law 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.



Pathmakers, Inc. has been serving family businesses since 1995. This partnership of four focuses on the incorporation of people, process, and plan into family businesses of all sizes. Their mission is to help leaders fully understand their personal impact on those around them in order to have the courage and faith to challenge their people and their organization for enduring success.

Retained Earnings
Company



Retained Earnings Company has been providing business owners and their employees with solutions to their insurance and investment needs for over 25 years. The Retained Earnings team brings expertise in the areas of financial, estate and business succession planning, 401k's, employee benefits, investments, life, health, disability, and long-term care insurances.



Schenck Business Solutions is a full-service regional accounting and consulting firm with nearly 600 employees, serving businesses and individual clients through its 11 Wisconsin locations. As one of the largest Wisconsin-based CPA firms in the state, Schenck Business Solutions provides a full range of services including tax, business consulting, information technology, retirement planning, and human resource solutions for today's business, government and personal challenges.



University of Wisconsin Oshkosh College of Business provides undergraduate and graduate education with a wide array of outreach services to benefit economic development in northeast Wisconsin. A key strength of the College is providing professional expertise through personal contact among students, faculty, and members of the community.

Associate Sponsors:



The Business News is a local business newspaper serving a 10-county area of northeast Wisconsin. It focuses coverage on the Northeast Wisconsin area that matters most to you and your customers.



SPARK Advertising provides a wide range of creative marketing services including highly effective creative design, multi-media Web, advertising, and public relations.



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