



News Briefs

September 2006

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

Communications, Collaboration & Teamwork

September 14, 2006

7:00 am breakfast, networking & registration

8 am—noon

Butte des Morts Country Club

Sharon Krone, Family Business Consulting Group, Inc.

Families in business together are facing tough decisions every day that require thorough and complementary interpersonal skills. Communication skills are simply a necessity; yet, skills developed solely within an individual may not be the final answer for a successful family business to navigate such dicey questions. Often, a breakdown in group communication indicates inadequate skills among its members. But more often, a breakdown is due to the lack of practice (or a lifetime of bad habits) applying those individual skills with one another in a family setting, or is the result of poor system or organizational arrangements. In other cases, miscommunication or the absence of it altogether precipitates from the contradictory nature of families and their businesses.

In this workshop, Sharon Krone will help participants

- Recognize the three different perspectives of family, owners, and managers and specify the conflicting motivations among these three
- Identify best practices in family communications
- Distinguish between Speaker and Receiver responsibilities within a family communication system
- Understand examples of Advocacy and Inquiry speech patterns and their corresponding effects within a family context
- Select communication techniques not historically found in one's repertoire, and practice applying some, or all, of them in a defined group activity
- Identify and describe the different responses to conflict, including an advantage/disadvantage for each in a family setting

With a special interest in the "learning family", Krone brings the Forum her expertise in creating custom-designed educational programs for entire families or generational groups who desire to grow and learn as a group.

Get-Acquainted Reception

September 26, 2006

4:00—5:30 pm

Schenck Business Solutions

2200 Riverview Drive, Green Bay

After ten years of programming in the Fox Cities area, the Wisconsin Family Business Forum is expanding its program into the Green Bay area at the encouragement of area family business owners. For the first time, educational programs and best practice sessions are scheduled in the Fox Cities and in the Green Bay area.

We are inviting our Forum family—members and sponsors to plan to attend. Schenck Business Solutions is hosting the event in their "cellar" and providing hors d'oeuvres and beverages.

We are also inviting over 200 Green Bay area family businesses to attend and get-acquainted with the Forum.

Agenda

4:00—4:30 pm Networking

4:30—5:00 pm Challenges of family business—*Thom Cody, Pathmakers, Inc.*

Family business success factors—*WFBF's Burk Tower*

Who we are/benefits we receive

5:00—5:30 pm Networking

In addition to an introduction to the Forum, food, beverages, and opportunities to network, we will have door prizes.

This will be an excellent opportunity to introduce family businesses to the Forum and to interact with other family businesses. We encourage family businesses who are interested in learning more about the Forum to attend and to bring family members and non-family executives.

Registrations can be made on-line at the Registration link of our web site: wfbf.uwosh.edu and are due by September 22. For further information, check our the web site or contact Sue Schierstedt, Director, at (920) 424-2257.



Leveraging Your Strengths as a Leader

October 24, 2006, 3-6 pm

Butte de Morts Country Club, Appleton

Amy Biersteker & Thom Cody, Pathmakers, Inc.

Whether your business most resembles a Volkswagen Beetle, or luxury touring coach, the key to success lies in the passengers. It is essential to have the right people on the bus and even more important to have the people in the right seats on the bus. In a family business, this often presents a great challenge. Many times we hold several varying roles within the business, we take on roles based on necessity, not our skill set, or even our interests. In some cases, we do not even have a clear map of where the bus is headed, resulting in many backseat drivers.

In this session, Thom and Amy will help you familiarize yourself with various leadership styles. They will also introduce to you the concept of leveraging your values, leadership style, and skill set to impact your organization. The end result for you is leadership that is culturally aligned with the vision of your organization, and roles that allow leadership to leverage their strengths and positively impact those around them.

Attend to gain an understanding of your leadership style and its impact on your business and to learn to leverage your strengths and surround yourself with the right people to complement your strengths. Amy and Thom will challenge you to begin to lead your business and your team from a place of freedom in this workshop.

JAG Outdoor Advertising, Inc.

Founded in 1946 by Gerald (Jag) Haegele, JAG Outdoor Advertising, Inc. of Algoma became a member of the Forum in January of 2002. Primarily a billboard company, JAG Outdoor also designs and produces handcrafted signs, vehicle lettering, banners and other similar signage.

In 2002, Jane Sweasy, one of Jag's five daughters, was working for her father as a sales representative. JAG Outdoor had approximately 400 outdoor advertising locations throughout northeast Wisconsin and employed about 11. Today, with the guidance and help of Forum members and sponsors, JAG's ownership has successfully transitioned to Jane and her sisters, with Jag's blessing. And, the family involvement has grown. Jag, Chairman of the Board, and Jane, now president, have been joined by Jane's brother-in-law, Patrick Heil, vice president of operations.

As a member, JAG Outdoor has been a strong participant in Forum programs and peer groups. Jane has also been a wonderful advocate for the Forum, introducing many family businesses to the Forum's benefits as she has experienced them.



About a year ago, her enthusiasm and commitment to the Forum led her to offer the Forum billboard space. With the Board's approval, JAG has been busy designing a billboard for the Forum. JAG's contribution of billboard space will provide the Forum excellent visibility in the highway 41 corridor between Kaukauna and Green Bay during the coming year. This is perfect timing for the Forum's expansion to the Green Bay area.

As a non-profit organization with a very limited marketing budget, this is a very significant contribution and benefit to the Forum.

Thank you, JAG Outdoor!

Peer Groups

According to many of our members, the peer groups are among the most valued features of the Forum. They provide an excellent venue for family and non-family members with similar needs and interests to develop knowledge and skills, to learn from each others' situations and experiences, and to develop valuable relationships.

Peer groups are usually composed of 8-10 participants who have similar needs and interests. The group members determine the focus and format of their meetings, and when and where to meet.

As we begin our new programming year, we are surveying our members and sponsors about interest in participating in a peer group. The survey, which was sent via our electronic mailing list, described each existing group and possible new groups, and inquired about interest in participating.

Group meeting schedules are being developed during September. For further information, a copy of the survey, or to join a group, contact Donna (nelsond@uwosh.edu) or Sue (schieress@uwosh.edu).

Non-Family Group:

On July 18, Tim Wuest of Badger Mining Corporation gave the group a overview of their leadership development process and their leadership training. Group members found the presentation very helpful and asked many questions regarding how they might design and implement a similar development process in their organizations.

On **September 26**, the group will meet with Amy Biersteker and Thom Cody of Pathmakers to talk in more detail about the process of leadership assessment and development.

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:

J.J.Keller will host the **September 26** meeting of this group. The topic of discussion will be "rolling out a new software system."

If you are interested in participating, contact Sue.

Member News

Badger Mining Corporation was recognized as the #1 Best Small Company to Work for in America. The recognition was announced on June 26th before an audience of more than 12,000 at the Society for Human Resource Management's (SHRM) 58th Annual Conference & Exposition in Washington, D.C. Tim and Vicky are pictured with Colin Powell as they celebrated the announcement.



Bassett Mechanical is celebrating its 70th anniversary on September 15.

Fond du Lac Bumper Exchange, Inc. celebrated its 50th anniversary on July 29.

More than 450 people played 18 holes of golf to help expand the **U.S. Oil Co., Inc.**'s Needy Children's Funds by \$744,600 during the company's one-day philanthropic event, which took place at three golf courses in De Pere, Kaukauna and Greenleaf.

Director's Column

Sue Schierstedt



The Forum is expanding to Green Bay this year. Nevertheless, we will continue to offer programs in Appleton and peer groups throughout the region, as determined by each group. Our objective with this expansion is to better serve family businesses throughout northeast Wisconsin.

The March program, *Harnessing the Power of an Independent Board*, will be delivered to two sites. Our presenter, Norb Schwarz, will be presenting the program live at the UW Oshkosh site in the Regency Suites, Green Bay. At the same time, the program will be web cast, live, to the Fond du Lac area where we will have a moderator and small group discussions right along with the Green Bay participants. Participants at both sites will get full benefit of the program, including directing their questions to the presenter.

In addition to the March program, we are hosting a Get-Acquainted Reception on September 26 (see page 1) and two Best Practice sessions in Green Bay.

It is the Board's hope that all our members will participate fully in this year's programming and will help us share the benefits of the Forum with family businesses from all parts of northeast Wisconsin.

Are you in a profession that's requires continuing education? Did you know that the Forum's programs may give you some of the needed credits each year? If you want further information about this opportunity, please contact me. I would be happy to explain this in more detail.

Reminders:

- Forum members & sponsors can attend UW-Madison Family Business Center programs.
- familyforum@lists.uwosh.edu is our mailing list for your questions and announcements.

Sue

Wisconsin Family Business Forum Program Calendar

2006

Date	Event	Presenter(s)
Sep 14 7—noon	<i>Communication, Collaboration & Teamwork</i>	Sharon Krone Family Business Consulting Group, Inc.
Sep 26 4—5:30 pm	<i>Get-Acquainted Reception</i>	Forum members & sponsors
Oct 24 3—6 pm	<i>Leveraging Your Strengths as a Leader</i>	Amy Biersteker & Thom Cody Pathmakers, Inc.
Nov 30 7—noon	<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>Best Practice</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

Oct 24 8—11:30 am	<i>Effective Leadership in the Family Business</i>	Drew Mendoza Family Business Consulting Group, Inc.
Dec 12 8—11:30 am	<i>The Next Generation: Its Eight Biggest Challenges</i>	Greg McCann McCann & Associates Consulting

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 Sponsor:



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.



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