



# News Briefs

## September 2007

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

### Welcome 3 New Members

**B**eno Plumbing & Heating, Inc. of Green Bay was founded in 1926 by John J. Beno. His grandchildren Jim, president; Greg, vice-president; and Dan Beno, secretary/treasurer are the current leaders. Matt Beno, a fourth generation family member, is a plumber in the business. Beno Plumbing provides residential, commercial, and industrial plumbing installations throughout northeast Wisconsin. They compete in the bid to spec market and design build. Robin Van Zeeland of Van Zeeland Manufacturing is their member buddy.



**DeLeers Enterprises**, dba DeLeers Construction and DeLeers Millwork, is located in Green Bay. Founded in 1945 by Joseph "Jake" DeLeers, the business has six family members in the business. Jerry DeLeers is the second generation president of DeLeers Construction. Phil DeLeers is the second generation president of the DeLeers Millwork. Third generation members, Paul and Jim DeLeers, do construction sales and estimating, respectively, and Tom DeLeers does millwork sales. Dave Morton of Morton Drug Co. is their member buddy.



**Nsight Telservices** of Green Bay was founded in 1910 as Pulaski Merchants and Farmers Telephone Company. In 1922 with a majority of the stock, Daniel and Florence Riordan began the family of businesses that is now Nsight Telservices. Third generation leadership includes, Pat, president; Rob, vice-president; and Ray, Board member. Fourth generation family members, Brigid, Kate, and Kelly Riordan are now valuable members of Telservices. The Nsight family of businesses includes Cellcom; local Nsight, .NET Cable, Northeast Telephone Co., NetNet, Nsight Long Distance, and the St. Paul Tower. Diane Roundy of Schenck Business Solutions is their member buddy.



### Green Bay Chapter

**O**n July 27, 41 people gathered at Nsight Telservices in Green Bay to kick-off the Green Bay Chapter of the Forum. As we talked about the issues facing family businesses, had small group discussions about the differing expectations of the leadership and next generations, we were delighted with the participation and enthusiasm of the group. Evaluations clearly stated that the Forum's presence in Green Bay is welcome and valuable. Thanks to the professional presentation of the Forum membership by Rob Riordan, one outcome of the meeting was the receipt of membership applications.

### Plan Now to Avoid Crisis Clean-Up Later

September 11, 2007, 7:30 am—noon  
Butte des Morts Country Club, Appleton  
**Bonnie Brown Hartley**, Transition Dynamics, Inc.

**O**ne of the characteristics of family business ownership is the place that management of family issues takes in the scheme of business. This workshop is exactly "what the doctor ordered" for this ailment, and Bonnie Brown Hartley will have her "doctor's" bag of remedies for this ailment. The focus of this workshop is on preparedness for the unexpected.



Designed for owners, executives, and managers, this workshop provides family business "fire drills" which will challenge participants to develop contingency plans to address the unexpected.

Bonnie has demonstrated that by "learning to use a model for managing unexpected change, you support your family's and your business's abilities to respond quickly and effectively to unexpected change." Bonnie says, "These fire drills will help you build analytical skills and contingency action plans as well as emotional strength."

Registrations are due by **September 4** and should be made under the Registrations option on our web site.

## Surviving the Family Business Whitewater

October 18, 2007, 7:30 am—noon

**Don Jonovic**

Family Business Management Services

**D**on Jonovic has been working as an advisor to family businesses since 1973. He is the author of several books, including one of our members' favorites, *Someday It'll All Be... Who's? The Lighter Side of the Family Business*. Don is happy to be returning to Wisconsin as he is a graduate of Marquette University and has advanced degrees from UW-Madison.

Don's workshop will focus on strategies for management, sound governance, and transition of the successful family business. Those who have attended Don's workshops tell us that Don takes "the practical approach... with examples you could relate to. Also the humor injected kept it interesting. [His] presentation was well done and very professional."

Participants in this workshop will leave with a better understanding of the responsibilities they have as shareholder-partners, both to understand what their investment actually is—and the need to communicate and agree on the returns expected. The dangers of secrecy will be more difficult to ignore. Creating outside review and a "board" process will be more understandable, and seem more achievable. Accounting will have value as more than a simple tax tool, and the real role of budgeting and compensation's relationship to shareholder value will be more clear. Most importantly, participants will leave with tools they can use immediately and easily to begin structuring more effectively for the future.



lodging pricing for our group and is holding a block of rooms for the event. We have also received excellent golf prices for both the Irish Course at their Whistling Straits course and the Meadow Valley Course at Blackwolf Run.

To ensure that we get our guaranteed number of reservations for the dinner and lodging, and that you get the best possible rates, we are asking you to **plan ahead!**

Please discuss this event with your family and associates and make your reservations as early as possible. Dinner reservations should be made through the Forum website. Lodging



reservations will be made directly with The American Club. To make your lodging reservations, call 800-344-2838 and tell them you are part of the Wisconsin Family Business Forum group. You will be receiving more detailed information in the near future.

## Peer Groups

### Generation Now

The first fall meeting will be held September 19. The group facilitator, Dale Feinauer, will be contacting group members with the topic and meeting site.

### The next generation

On September 18, the group will meet for an orientation session to determine what individuals hope to gain from the group this year and to discuss the greatest challenges they are currently facing.

The group is composed of next generation family members who have varying levels of business involvement. Members interested in joining this group should contact Heather Holly-Pinnow at [heather@bigwhitebus.com](mailto:heather@bigwhitebus.com).

### Non-Family

The next meeting is scheduled for September 25 at Reeve Union, UW Oshkosh. The meeting will be facilitated by Matt Wirth of Buechel Stone Corporation. The topic is health care costs—self funding, HRAs, HSAs, etc.

This group is comprised of non-family executives of member businesses who meet regularly to explore common areas of interest, learn from one another, and network.

### Information Technology

On July 17, the group met with Ken Splittgerber, IT Director, and Laura Knappen, Director of Academic Computing at UW Oshkosh. After a tour and discussion of the campus computing infrastructure, Ken talked about the challenges facing his department and some of their recent accomplishments. The next meeting is scheduled for October 24.

### Couples

On May 24th, ten members met for dinner at Fratello's in Oshkosh to explore starting a Forum Couples Group.

## 12th Annual Dinner—A Family's Heritage

Sunday, May 4, 2008

5:00—8:30 pm

**Herbert Kohler**, Chairman/CEO/President  
The American Club, Kohler

**P**lan ahead and consider making this a special weekend! Our 12th annual dinner will be held at The American Club in Kohler. Herbert Kohler Jr. will be our dinner speaker. We have asked him to talk about the challenges and successes his family has faced since the beginning of their family enterprise.



Herbert V. Kohler, Jr.  
Chairman, CEO, and  
President of Kohler Co.

For those who choose to make this an enjoyable family weekend in Kohler, there will be opportunities to tour the Kohler Design Center, golf, and/or participate in one of their famous culinary events.

The American Club is providing special

These couples do not currently have children in their businesses and found that they have many interests and issues in common as business owners. The next dinner meeting will be October 25 at Zuppa's in Neenah. For reservations, contact Gail Ann Winkler or Merry Whipple by October 22.

Members who are interested in knowing more about the peer groups, or who would like to participate in a peer group are asked to contact Sue.

## Director's Column

Susan Schierstedt



One of the Board's goals for the Forum is to better meet our mission—*fostering healthy family businesses* – by extending the Forum's programs, peer groups, resources and networking to more family businesses in north-east Wisconsin.

One step in reaching this goal was the launch of a Green Bay Chapter in July, the Forum's response to Green Bay family businesses requests for offerings in their area. These business owners agreed that learning and networking in programs with all members in a central location was valuable. They also wanted some area events. We are pleased that we now have eight members in the Green Bay area who are very enthusiastic about their Forum membership and are inviting their peers to join.

As a next step, at the Board's August meeting, it was agreed that we would eliminate all exclusivity across the membership and sponsorship as that policy was hindering the growth of the membership. Each member representative has, or will shortly, receive a ballot with the proposed Bylaws changes that will allow us to implement this change. We ask that each member carefully consider the changes and respond in the requested time. Two-thirds vote of the member businesses is required for Bylaws changes – so your vote counts.

The Board also approved the test marketing of a subscriber membership concept to provide some of the Forum's resources to small family businesses that find it difficult to get away from the business, and to family businesses outside our service area. As a subscriber, a family business will be able to access Forum program content in electronic format via the Internet or CD, to attend programs at a per person fee, and to receive the *News Briefs*. We will be sending introductory information to targeted family businesses in September inviting them to participate in this market test. If you know of family businesses that should be invited to participate in this 6-month test, please send their contact information to me.

As we begin our 12th programming year, we are excited about the opportunities we have to provide quality programming, peer groups, family business resources, and networking opportunities to more family businesses. We recognize that with many new businesses, the **networking opportunities have increased**. We also recognize that there will be many **new faces**. With your help, the Forum

family will grow in size and will continue to be a **warm, welcoming family** for current and new members, sponsors, and subscribers. With your help, we will reduce the amount of "change pain."

Wisconsin Family Business Forum Program Calendar		
2007		
Date	Event	Presenter(s)
Sept 11 8—noon; 7:30 am breakfast	<i>Plan Now to Avoid Crisis Clean-Up Later</i>	Bonnie Brown Hartley
Oct 18 8—noon; 7:30 am breakfast	<i>Surviving the Family Business Whitewater</i>	Don Jonovic Family Business Management Services
Dec 4 1-4pm; 4 pm— holiday reception	<i>Selling the Family Busi- ness: the decision, the process, the after life</i>	Jim Hayes, et. al.
2008		
Jan 22 1-4 pm	<i>Mentoring and Coach- ing the Successor</i>	Vince Gallucci & Kim Bassett- Heitzmann
Mar 5 8—noon; 7:30 am breakfast	<i>The Next Generation— the 8 Biggest Chal- lenges</i>	Greg McCann McCann & Associ- ates
May 4 5:00— 8:30pm	<i>12th Annual Dinner</i>	Herbert Kohler Kohler Company
UW-Madison Family Business Center		
2007		
Sept 11 7-11:30 am	<i>Ethics: The Heart of a Family Business - An Interactive Forum</i>	Denis Collins Edgewood College
Oct 1 pm or Oct 2 am	<i>Excellence in Family Governance</i>	Cindy Iannarelli

## Program Reciprocity

Forum members may attend programs at UW-Madison's Family Business Center. Contact Joyce Fasanella at 608-441-7347 to register. There is a small per person charge.

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**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.



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