

# News Briefs

## Executive Director Report

### Meridith Jaeger

As the new program year gets underway, it is with great pleasure that I greet you as your new Executive Director. Although my first official day in the office is not until September 2<sup>nd</sup>, I have had the opportunity to meet many of you throughout the recent months. In each case, I was greeted with warm smiles, open arms and a genuine excitement for my tenure to begin. You have made becoming part of this special organization feel like coming home to me.

I look forward to leading the Wisconsin Family Business Forum in delivering the mission to foster healthy family businesses. Most of all, I am excited to spend time getting to know each and every one of you and learn about your family and your business.



## Chairman of the Board Report

### Steve Weinert's Chair Chatter

What an awesome time for the Wisconsin Family Business Forum with our much appreciated Interim Team's successes in organizing and preparing for new leadership and our successful recruitment of Meridith Jaeger as our new Executive Director. We are so pleased to have Meridith onboard for the start of our 2014-2015 Program series.

I wanted to speak to the team effort that we've experienced in getting a lot of hard work done. Just like a Family Business once the WFBF recognized we faced challenges that required action, people stepped up to do what we needed to do. With support and direct efforts from almost every quarter, we have revitalized the Forum and as a group given it new life. Truly each of us throughout the forum should thank each other for support and efforts to make our change.

Exciting times ahead – and we hope with everyone's effort the positive benefits of the WFBF will enrich each of our businesses, families and personal lives. We also want to grow – to "pay forward" the debt of advice, education and counsel we've each received from our WFBF experience to benefit other family businesses. We'd like to challenge every participant to recruit a new or returning member or sponsor. Through sharing our Forum we will not only fulfill our "pay forward" debt but we too will benefit from the increased Family Business community and fellowship.

A special thanks again to our Interim Team – Sue, Al, Dale and Emily. (Emily's talents were recognized by her recruitment to a significant event planning position in Vermont – we wish her every success!) and a heartfelt welcome to Meredith.

## Negotiate 4 Profit — Skills Workshop

September 24  
7:30AM-noon  
Butte des Morts Country Club  
Presenter: **Tom Parker**, Sr. VP of  
Yukon, Inc.



We all negotiate something with someone every day: at work, at home, out shopping, etc. We will continue to negotiate for the rest of our productive lives. It isn't optional, it is a part of being human.

This workshop is designed to give participants a very specific set of skills and tools to take the drama and stress out of their negotiations. This will give them the confidence and insights they need to do a great job for themselves, their families, and their companies.

While appropriate for virtually anyone in business, this workshop is particularly valuable to those on the front lines: business owners, sales professionals, purchasing managers, HR directors, and senior management.

This workshop covers:

- Understanding different negotiation styles
- Recognizing the role of ego in negotiations
- Dealing with tough or unpleasant situations
- Uncovering hidden motivation
- Recognizing and dealing with tactics
- Reading and understanding non-verbal cues
- Effective planning

This content is delivered in an interactive format with lots of small group exercises, real life examples, and illustrations of key learning points.

Each participant will complete an assessment that will give them insights into their own natural negotiation style. In addition, each will receive a Planning tool to use in preparation for future negotiations.

Registration for this program is available at the Forum's Programs/Registrations link on its website.

## Member News —

**Anika Capelle**, president of **Conger Toyotalift**, has received the prestigious Presidents Award from Toyota.

Anika says, "The Toyota Presidents Award is a true honor and an acknowledgement of the hard work and dedication that the Conger associates have for our customers. As with any accomplishment, it isn't earned without a lot of trials and tribulations as well as a lot of fun and enjoyment. Thank you to all of our associates and their families."

Please be sure to congratulate Anika.

**Sisters, Beth Wenzel, Kris Bastian and Darcy Zander-Feinauer**, hosted a 120 year anniversary celebration on July 31, 2014 at **Zander Press Inc.** in Brillion. Congratulations on the growth and success of your business!



## Forum News —

**M**any of you had the opportunity to meet, work with, or communicate with our Interim Administrative Assistant, Emily Gneiser. Emily was extremely good at planning events and administrative support. We are indebted to her for her dedication to and passion for the Forum. She did an excellent job of jumping in and making details seem easy. Emily left the

Forum to begin her dream job as wedding coordinator at The Essex Resort and Spa in Vermont. She invites us to come visit her.

I am pleased to inform you that Bryan Hulbert has joined us as our Interim Administrative Assistant. Bryan comes to us having managed campus paperwork (a big hurrah there!), and program planning and development. After spending a few hours with Emily, Bryan took over and has been a great help as we held the picnic and coordinate the fall programming. Bryan can be reached at wbf@uwosh.edu and 920-424-1541.

## Healthcare Update I — recap

**O**n July 22nd, **Kim Houlton, Schenck sc HR Consulting Manager**, began the program by talking about the value of engaging your employees. After defining employee engagement as the emotional connection an employee has with the organization and its goals, Kim talked about ways to achieve engagement. She cited the business results that are associated with engaged employees along with the research sources for each. The surveys show that when an employee is engaged, there was:

- 12% higher profitability
- Seven (7) times greater 5-year total shareholder return
- 87% less likelihood that the employee will leave

Kim concluded this section by discussing the relevance of engagement as it relates to health insurance.

**Dustin McClone, McClone's Executive VP—Employee Benefits**, continued the program by talking about myths vs. reality when it comes to the health care act. He focused on

- Under 50 employees vs. over 50
- Pay or play
- Insurance marketplace changes

Dustin wrapped up the session by talking about the results of an AFLAC study regarding health insurance. One finding from that survey in response to the question, "What could your employer do to keep you in your job?", is that 49% of those surveyed said, "improve my benefits package."

Kim and Dustin concurred that communication is the #1 driver of satisfaction with benefits packages and recommended taking at least 15 minutes to discuss health insurance other than during the choice period. That discussion can enhance understanding and improve satisfaction with benefits.

The Forum intends to host another HealthCare Update later in Fall as the healthcare law continues to evolve. Watch for more information.

## Old-Fashioned Family Picnic and Business Tour — August 21<sup>st</sup>

On August 21st, **Printco Inc., Bank First National** and **Davis & Kuelthau s.c.** hosted over 50 members, sponsors, and guests for an old-fashioned family picnic.

Using Printco's property as the picnic site, participants enjoyed a kickball game, corn hole, great food and a lot of laughter. It was fun to get visit with each others' families and associates in a relaxed environment.

As, always, it was good to tour one of our member businesses and learn from their experiences. Ken and Phil Sperling of Printco told their family business story while taking us on a tour of their extensive printing operation.

Thanks to Bank First National's Meghann Kasper, Davis & Kuelthau's Tony Renning and Pagette Fischer, Schenck's Dawn Benish, and Printco's Ken and Mary Sperling for sponsoring, planning and implementing the picnic. It was truly the Forum family in action. Thanks to all attendees for making it a great success!

## Family Business Education Certificate Program

The Family Business Education Program (FBE) plays a critical part in the development process for family members, non-family managers, and family business advisors.



Family Business Education Certificate Program Calendar for 2014-2015		
Date	Topic	Presenter
Oct 10	Defining the Family Business	Dale Feinauer, Meridith Jaeger & Phil Florek
Nov 19	Family Business Governance	Bob Mathers & Dale Feinauer
Dec 17	Strategic Planning in a Family Business	Ashay Desai & Dale Feinauer
Jan 14, 2015	Business Management, Legal Liability & Banking	Phil Florek, Tony Renning, Karen Urban-Dickson, Corey Kolbe
Feb 11	Evolving Ownership; Human Resources	Ron Altenburg & Tom Moniz
Mar 11	Evolving Leadership in the Family Business	Dale Feinauer, Steve Utech, Melissa Utech
Apr 9	Managing Culture, Change & Conflict	Dale Feinauer

This program provides its graduates with real-world, relevant information about how to strategize and navigate the waters of family business. Past participants, including senior family executives, next generation leaders, and non-family managers and advisors, have given it the highest marks.

This program is offered to both members and non-members. For more details about the program, visit the Family Business Education link on our website—<http://wfbf.uwosh.edu>. Registration is now open on the website.

**Early bird registrations providing a discounted rate are available through September 15th.**

## Peer Groups

It's time to get involved in a peer group, if you aren't already a member of one. Contact Meridith Jaeger at [wfbfdirector@uwosh.edu](mailto:wfbfdirector@uwosh.edu) or 920-424-2257 if you are interested in joining or starting a group. Group composition and space availability is dependent on interest and space as groups are limited in size.

### Generation Now

The Generation Now group is made up predominantly of individuals who have taken over responsibility for operating their family business within the last 5-7 years.

### Green Bay Chapter

This is a heterogeneous group of family business owners and advisors from the Green Bay area. The group meets to discuss issues identified by them as relevant.

### Non-Family Executives

This group is composed of non-family presidents, chief financial officers, human resource directors, operations and general managers. The group focuses on their unique roles and responsibilities as part of a family-owned business.

### POPs

This group is composed of next generation family business members who are focusing on their personal and professional development.

### Senior Executives

Group members represent the senior leadership in member businesses. They focus on challenges of the economy, transitioning the business to the next generation of ownership and leadership, coaching and mentoring, life after retirement, and other areas of interest.

### TBD

This group is composed of individuals whose future roles in their organizations are TO BE DETERMINED (TBD). They focus on issues associated with being the next generation leaders.

*Does your website identify you as a Forum member?*

## Program Calendar — Fall 2014

### Wisconsin Family Business Forum Program Calendar

<u>Date</u>	<u>Event</u>	<u>Presenter(s)/Facilitators</u>	<u>Location</u>
9/24/2014	<i>Negotiate 4 Profit</i>	Tom Parker, Senior VP of Yukon Inc.	Butte des Morts Country Club, Appleton
10/22/2014	<i>Family Business Expo &amp; Reception</i>	Program Committee	La Sure's Hall & Banquets, Oshkosh
Register online at <a href="http://wfbf.uwosh.edu">http://wfbf.uwosh.edu</a> — <a href="#">Programs/Registrations link</a>			
<b>Family Business Center at UW-Madison Calendar</b>			
	<i>Check the website for upcoming lectures</i>		
Register online at <a href="http://bus.wisc.edu/cped/fbc/events">http://bus.wisc.edu/cped/fbc/events</a>			

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