

**Succession Planning: Who Decides What and How**

September 17, 2009, 8:00am - Noon

7:30 breakfast & registration

Bridgewood Resort Hotel, Neenah

Presented by Stephanie Brun de Pontet, Family Business Consulting Group



Preparation can improve outcome on every level. Through the challenging process of exploring the differing needs, hopes, and concerns of affected stakeholders in a succession, more sophisticated solutions for the family and business will emerge to help the next generation move forward from a position of renewed strength. Though most family business leaders and stakeholders have likely heard that family business succession is hard and the downfall of many a great company, what may be less well-known is that there are proactive steps a family business can take to significantly improve their odds at success with succession.

This intensive seminar will educate participants on the nature of the complexities involved in the succession process, and help them to map out strategy for working through the process in their businesses. Much time will be allocated to questions from the audience, and active participation with concrete examples on the issues being discussed. Particular attention will be paid to the perspective and role of key stakeholders focusing on how these varying points of view make this process so challenging.

**Governance and Continuity Check Up**

October 21, 2009, 8:00am - Noon

7:30 breakfast & registration

Butte des Mort Country Club, Appleton

Presented by Katherine Grady, Lansberg-Gersick, Inc.



Governance systems and policies should be as complex as they need be to get the job done, but no more. At their best, they provide a means for all stakeholders' voices to be heard and provide a vehicle for making decisions and resolving conflicts as the family business grows and manages the transition to the next generation. At their worst, they are ineffectual, lack power or authority, get tied up in sub-group conflicts, exist on paper only, or are closed to important stakeholder groups.

This program provides an opportunity for forum members to review their own governance structures and take a look at whether they are serving the needs of stakeholders. During the presentation, forum members complete a *Governance and Continuity Checklist* to assess the health of their family governance system and their readiness for continuity.

Participants then have an opportunity to discuss their self-diagnosis with other members from their family business or with family members from other companies who are at similar stages. They will also have an opportunity to develop action plans to address identified governance needs.

**Wisconsin Family Business Forum Business Expo**

December 1, 2009, 3:00 - 6:00pm

Holiday Reception

Butte des Mort Country Club, Appleton

Program Committee and R&R Committee



The Program Committee and Recruitment & Retention Committee would like to give multiple people from Forum member and sponsor organizations the opportunity to promote business awareness and casual networking during this busy time of year. We encourage members and sponsors to invite prospective family business members to see who the Forum is and what we are all about.



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### **Growing the Family Business**

January, 26 2010, 1:00 - 5:00pm  
Reeve Union Ballroom, UW Oshkosh  
Presented by Thom Cody, Pathmakers, Inc.

So you have made the decision to grow your family business. Great! Now what? This unique Talk Show formatted program will explore the strategies, struggles, and impact of growth in a family business. The format will be fun, playful, and interactive, but the messages will be applicable to your own growth plans and hurdles. Don't miss this opportunity to laugh and learn with friends in the Forum.



### **Fostering Healthy Communication**

March 24, 2010, 8:00am – Noon  
7:30 registration and breakfast  
Butte des Mort Country Club, Appleton  
Presented by Dean Fowler, Dean Fowler Associates, Inc.

Family communication 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. This workshop will focus on characteristics and implantation of individual and systemic functional flexibility. Participants will learn tools that help to constructively manage change and the conflict that change produces in the family and business system.



### **14th Annual Dinner**

May 10, 2010, 5:30 - 9:00pm  
Bridgewood Resort Hotel, Neenah  
Speaker: Dan Ariens, Ariens Company

The annual dinner is the culmination of the Forum's program year. This event provides members and sponsors to enjoy dinner, networking, recognitions, and a family's business heritage in a comfortable environment. Members and sponsors are encouraged to extend this dinner invitation to regular Forum attendees from their businesses as well as to family members and associates who might not regularly participate.

### ***Program Registrations***

*Reservation forms are generally available on the web site six weeks before an event. Reservation deadlines are set to ensure that materials and food are available for everyone. Please adhere to the deadlines.*

### ***Program Content Distribution***

*Programs are audio recorded and made available to members and sponsors upon request via electronic distribution after the event and via our web site.*

### ***Guest Policy***

*The Forum encourages potential member family businesses and potential sponsor organizations to attend one Forum program/meeting as our guests at no charge, with the exception of the dinner or other special events. To learn more about the Forum and how to attend as a guest, contact the Forum office at (920) 424-1541.*

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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