



News Briefs

March 2004

Welcome Rollmeister Inc.

On February 9, the Forum Board accepted the membership application of Rollmeister Inc. of Neenah. In 1994, Rickie Waller, president, founded the business which grinds and repairs rollers.

Rickie is joined in the business by his wife, Karen, twin sons, Michael and David, and, most recently, by his brother Rodney.

The Successors had an opportunity to welcome Dave Waller on February 9 at the Successors' group meeting. We look forward to officially welcoming Rollmeister at our March 10 program.

Managing Change in the Family Business

March 10, 2004

7 am—3 pm

Butte des Morts Country Club, Appleton

Bob Shaver, faculty associate, UW-Madison Executive Education, will be our workshop leader on March 10 for this highly interactive program focused on managing change.

Bob will lead us through a process in which we will

- Explore some of the key reasons employees, leaders, and customers resist change;
- Evaluate a change agent and use the results to identify the skills you want to develop to be a more effective change agent;
- Experience first-hand how the actions of the change agent influence the resistance to change and ultimately its success or failure;
- Examine some of the strategies other companies have used to reduce complacency and increase the urgency of change.


Note that the Program Committee decided to schedule this as a lengthier workshop so that we

could work through strategies for our businesses. Please come prepared to remain for the entire workshop, which will conclude with the strategy section.

Lunch is included in this workshop, as well as a continental breakfast during registration. Please use these times to network.

What would a change management workshop be if it didn't include change. Those of you who attended the January program at Liberty Hall know that they are in the midst of reconstruction and were unable to provide a good workshop environment for us. Therefore, the **March 10 program has been moved to Butte des Morts Country Club** to ensure that we can provide you with an appropriate workshop environment and great food service. Please be sure to note this change in your calendar.

Welcome Right Management Consultants

We are extremely pleased to introduce  Right Management Consultants as the newest Forum sponsor. For many years, we have sought to add this resource to our Forum expertise. It has finally happened.

Right Management Consultants focuses on managing the human side of change in ways that produce powerful, positive, and lasting results. Right is the world's leading career transition and organizational consulting firm. Right offers a complete range of career transition services and helps design customized solutions for enhanced organizational performance, leadership development, and talent management.

We were pleased to introduce Kurt Johnson, vice president, and Jodi Oleson, regional manager, at the January program. Jodi will represent Right on the Forum Board and Kurt has been participating on the ad hoc Sponsorship Committee. Tom Wiltzius, senior vice president, is recuperating from knee replace-

ment surgery and will begin participating on the Program and Recruitment & Retention committees when he is back to the office.

Several of our members who are well acquainted with Right Management Consultants and their services have indicated that Right is an excellent addition to our Forum.

We encourage you to introduce yourselves to Jodi, Kurt, and Tom and to welcome them to the Forum.

Disasters Come in Many Varieties: Planning for the Unknown

Participants at this January 20 program were very pleased with Laura Leitzinger, vice president of technology infrastructure for Oppenheimer Funds. Having gone through the detailed process of developing a business continuity/disaster recovery plan and having actually implemented it several times, Laura provided excellent planning guidelines and examples.

One member commented that Laura did an excellent job of making the information relevant and useful for their needs. Another commented that it is clear that all businesses share such common issues. Several commented that they are working on their business continuity plans and appreciated the guidance provided by Laura.

The program mixed the business continuity planning and disaster recovery implementation of Oppenheimer with the experiences of PAMCO as described by Pam Baumann and her daughter Lisa. Pam and Lisa described the wide array of family and business events that can disrupt and threaten the family business.

Participants found the everyday issues, examples, and handouts valuable. As one person commented, this was "a good awakening."

Member News

Congratulations to **Tom Gross**. Tom has been named 2003 Outstanding Alumni by the College of Business Administration, UW Oshkosh. Tom is the owner and president of Ahern-Gross Inc. of Fond du Lac, the largest residential/commercial service plumber in Fond du Lac County. In 1973, Tom graduated with a degree in finance. In 1977, he completed a degree in accounting. Tom was honored at Butte des Morts Country Club on February 21 by the College of Business at its Annual Alumni Dinner.

Affinity/Peer Group Meetings

Successors Group:

The successors met on February 9 at Meyer Services, Appleton. The meeting was hosted and coordinated by Dan Meyer, president of Meyer Ser-

vices, and his sister, Amy Schucknecht, office manager.

Dan invited Dale Feinauer, UW Oshkosh human resources faculty member, to talk about *Effective Family Business Communication*.

Dale engaged the group in consideration of: The Need for Communication Planning, Selecting Your Communication Medium, Communicating Change, the Communications Process, Listening, and Feedback. He incorporated several quizzes, many examples, and good Q&A into the discussion.

In keeping with the Meyer Services tradition, Dan introduced a skills challenge to the group. Using a back hoe, each participant was to lift a piece of plywood, each end of which was resting on a 33 gallon trash can and move it across the area, placing it on two other cans. Darcy won, accomplishing the task in 1.34 minutes, thus defending her championship from last year. Darcy's award was some of John Meyer's prized frozen Walleye.

The next meeting of the Successors will be March 23 at Flex-Staff Inc. The meeting will be hosted by Mike Hackbarth and Steve Kamrowski. Right Management will talk about leadership development, a topic of significance to the group. With Right's help, the group will decide whether or not to focus future group meetings on those development issues needed by Successors.

Best Practices:

Best Practices met on February 20. The meeting was hosted and led by Jerry Mader, publisher of The Business News, the Forum's associate sponsor. The topic of the meeting was Sales Strategies. Jerry "sold" the group on understanding that customers are only interested in what your product or service can do for them!

He stressed how to identify potential customers, the best way to communicate with them, and how to be a more productive sales professional.

Jerry and this topic attracted one of the largest Best Practices groups we have had. Thanks to Bassett Mechanical and Kim, we had a large enough room to host the meeting. Thanks also to Jerry for providing the presentation and the lunch.

All member businesses are encouraged to participate in the Best Practices and/or the Successors groups as part of Forum membership. Registrations for specific meetings are required so that we have an appropriate meeting space, necessary materials, and, in the case of Best Practices, the host business can provide a working lunch.

Registrations for these meeting should be sent to Ann Stein at (920) 424-1541 or steina@uwosh.edu.

Forum Membership Fee

The Board has approved a \$50 increase in the annual membership fees effective July 1, 2004. This minimal increase will help us keep pace with rising health care costs, while recognizing the need to keep fees as stable as possible. Invoices for renewals after June 30 will indicate this change.

Member Book

The Forum resource center is now the proud owner of **The Story of J. J. Keller & Associates, Inc.** This 50th anniversary publication tells the story of the creation, history, and progress of the family business along with insights into the personal history of its founder and his business, as told by John J. himself. The book also includes insights into the second and third generations, the company's philosophy about community support, and many other interesting vignettes.

We invite all of our members and sponsors to donate copies of their business' story to the Forum.

The Keller book is available for check out from the resource center as are all of our other resources. The resource listing is available in the *Members Only* section of the Forum's web site.

Forum Website

All the contact information about fellow members and sponsors, meeting dates, program information, Bylaws, etc. are available in the *Members Only* section of the Forum's website. Please be sure to check out the site (<http://www.uwosh.edu/wfbf/>).

If you lost your username and password, contact Ann Stein at steina@uwosh.edu.

Spring Dinner—May 3

The Spring Dinner provides us with an opportunity to celebrate our achievements, to recognize outstanding Forum supporters, to enjoy each other's company in relaxing surroundings, and to hear the story of a successful family business.

This year we have invited Craig Culver, founder of *Culver's Franchising Systems* and *Culver's Frozen Custard*, to be our dinner speaker.

Kurt Wanless, McCarty Curry Wydeven Peeters & Haak LLP and Program Committee member, personally invited Craig Culver to speak. Kurt grew up in the Sauk City area and regularly visited Culver's to enjoy his favorite, strawberry shortcake custard. In visiting with Craig Culver recently to go over the evening and our expectations, we discovered that he knows Kurt's family. It is a small world.

We found Craig to be very personable and under-

standing of our interest in hearing about his family business, his challenges, and successes.

We encourage you to bring your spouses and business associates for this very enjoyable evening. As we will be at Butte des Morts Country Club, we will have room to comfortably have more people attend this year.

Summer Social Event

Take me out to the ball game, was probably a lyric you grew up singing. Let us take you back to the "good ol' days" by inviting you and your family to join us on June 10 for a Timber Rattlers dinner and game.

Because we need to buy enough dinners and seats for everyone in advance, we will ask you to make your reservations early. Please be sure to respond promptly when the details are sent to you.

Wisconsin Family Business Forum Program Calendar – 2003-2004

Date/Time	Topic/Event	Presenter(s)
Mar 10	Managing Change in the Family Business	Bob Shaver <i>Executive Education, UW-Madison</i>
May 3	8th Annual Dinner: A Family Business Heritage	Craig Culver <i>Culver's Franchising Systems</i> <i>Culver's Frozen Custard</i>
June 10	Timber Rattlers—A Family Outing	Burk Tower <i>College of Business</i> (event coordinator)

Programs Provided by Our Reciprocity Partners

Family Business Center, UW-Madison		
Mar 2	Four Generations and Still Poppin'	Garrett Smith, American Pop Corn Company
Center for Family Business, Marquette University		
Mar 11	Enterprising Leadership: Entrepreneurial Mindset in Both the Ownership and Management of Teams	Mike McGrann Babson College

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 113th year of providing financial services to the people and businesses of the Fox Valley with locations in Appleton, Menasha, Neenah and Oshkosh.



Grant Thornton LLP is the leading accounting, tax, and management consulting firm dedicated to helping middle-market companies achieve their business and financial goals" by providing services that deliver measurable value to their clients. Grant Thornton is one of the global seven accounting firms, serving public and private middle-market clients throughout the United States and in 109 countries.



McCarty Curry Wydeven Peeters & Haak, 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.

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Retained Earnings Company/MassMutual Financial Services has been providing business owners and their employees with their insurance and investment needs for over 25 years. The Retained Earnings/MassMutual 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.



Right Management Consultants is the world's leading career transition and organizational consulting firm, offering a complete range of career transition services and designing customized solutions for enhanced organizational performance, leadership development, and talent management.



University of Wisconsin Oshkosh, College of Business Administration 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.



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