Family Business Center
Education and Resources to Help You Thrive

2020 – 2021

LEARN MORE  uwfbc.org
Welcome!

The Wisconsin Family Business Center is a supportive community of business-owning families who are committed to learning together and sharing knowledge to build stronger families and better businesses today and for years to come. This year we will be focusing on helping family businesses manage the short term while preparing for long-term success. Our programs will be held in a convenient online format (and in-person when permitted) making it easy to access important content and build connections to help you, your family, and your business thrive.

If you are interested in learning more about the Wisconsin Family Business Center, please visit our website, attend a program as my guest, or reach out to me directly. I look forward to meeting you!

Together Forward,

Sherry Herwig, Director

Programs delivered by the Center for Advanced Studies in Business, Inc., an affiliate of the Wisconsin School of Business.
Thank You Sponsors!

The Wisconsin Family Business Center sponsors are an integral part of our organization. These companies believe in the spirit of family businesses and provide important services and resources that all family businesses need. The professionals who represent these companies have taken the time to understand the unique challenges that family businesses face so they can better serve you.

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2020 – 2021 Speaker Series

Our programs offer timely and relevant content and, this year, align with a recent global survey Crossing the Crisis from the International Family Enterprise Research Academy* on managing the crisis, preparing for the future, and focusing on the family. The survey found that “in this climate of uncertainty, the need for accurate, reliable and useful information is greater than ever.”

*https://ifera.org/crossing-the-crisis/

September 15, 2020
ONLINE PROGRAM VIA ZOOM
8:30 – 9:45 a.m. Program
9:45 – 10:30 a.m. Breakout Discussion

Emerge Successful: 7 Strategies to Redesign, Rebuild, and Relaunch your Business
Presented by Meridith Elliot Powell

Who would have thought a virus could so drastically impact our marketplace? As leaders and family business owners, how and where you focus your time and energy will determine not only if you make it, but if you and your business will emerge successfully. Whether you need to breathe new life into the company you have, expand into new markets, or completely reinvent your business, this program will help you turn uncertainty into a competitive advantage.

Key Takeaways:

• Learn innovative techniques for quickly assessing market changes and your business model
• Gain insight into how the market is shifting and where the opportunities are
• Hear real-world stories of businesses and leaders who pivoted to success
• Receive a customized plan of action to Rebuild, Reinvent, and Relaunch

“The greatest value we have gained from being a part of the FBC community has been to understand the strategic framework necessary to successfully engage the family, owners, and company executives. We have gained perspective that we are not alone in many of the challenges we face as a family business.”

Matthew Uselman, Wind River Financial
October 8, 2020
ONLINE VIA ZOOM / IN-PERSON**
8:30 – 11:30 a.m.

Next Generation Capabilities: Technology and Workforce Opportunities for Family Enterprises

*Presented by Danielle Valkner and Claudia Montgomery, PricewaterhouseCoopers*

Digital transformation begins and ends with customer experience. Learn about the latest developments in automation and emerging technologies, how they are being used in family enterprises, and how the workforce is changing as a result. Experts from PwC share recent trends and examples of technology innovation and will guide you through transforming your business.

**Key Takeaways:**
- Practical examples of technology transformation and how to get started
- How to inspire your workforce and embrace your tomorrow
- The impact of COVID-19 and opportunities to emerge stronger from the pandemic
- Identify opportunities in a time of disruption

November 12, 2020
ONLINE VIA ZOOM / IN-PERSON**
2 - 5 p.m.

2021 HR Trends: New World of Work -- Are You Keeping Up?

*Presented by Summer Rector, The QTI Group*

Join us to get the information and data you need to drive decision making and actionable solutions to help your family business reach its full potential through people. Annually, QTI surveys hundreds of employers to better understand HR challenges and leading trends to overcome these challenges. The survey explores topics such as talent attraction and engagement strategies, compensation and benefit plans, diversity and inclusion programs, and more.

**Key Takeaways:**
- Top HR trends and what high-performing organizations are doing to attract, retain, and engage talent
- Compensation and benefit comparisons to help with 2021 budget planning
- Learn how to enhance your HR practices to be more competitive in the new world of work
- Hear unique and creative training and benefit offerings from family businesses
December 10, 2020
ONLINE VIA ZOOM / IN-PERSON**
8:30 – 11 a.m.

Weathering the “Storms”: the Vermeer Family Business Story
Presented by Heidi Vermeer-Quist Psy.D, VQ Consult

The Vermeer family business story began in 1948 out of grandfather’s workshop and has since grown into a first-class global manufacturing business, dedicated to putting people and principles first. Heidi will share the business’ foundations, family ownership challenges, response to recent business crises (tornado event in 2018 and COVID-19), and lessons learned.

Key Takeaways:
• Advantages and unique aspects of being family owned
• Building resiliency as a family-owned business (as a family and as individuals)
• Lessons learned from weathering ups and downs over 70+ years
• Sharing of other family business stories of overcoming adversity

January 2021
ONLINE PROGRAM VIA ZOOM
8:30 – 10:30 a.m.

Diversity, Equity, and Inclusion

More information coming soon. Please visit our website for program date and details.
February 11, 2021
ONLINE VIA ZOOM / IN-PERSON**
8:30 – 11:30 a.m.

The Power of Positive Conflict
Presented by Darcy Luoma, Darcy Luoma Coaching & Consulting, LLC

Conflict is inevitable and when you add in the complex dynamics of a family business, conflict can take many shapes. Yet, most high-performing leaders and teams see conflict as an opportunity to grow, rather than something to be avoided. Learn how to recognize sources of conflict and discover how to use it to create stronger family relationships and a more successful business.

Key Takeaways:

• Gain strategies on how to handle conflict as a leader in any setting
• Explore how to engage in positive conflict using non-defensive communication (responding with compassion and curiosity)
• Apply family systems theory to individual experiences and business case studies
• Learn about fundamental research from the Gottman Institute on “the four horsemen” (criticism, contempt, defensiveness, and stonewalling) and the “antidotes” to these toxins

A one-hour follow-up group coaching session will be offered as part of this program. Visit uwfbc.org for details.

March 11, 2021
ONLINE VIA ZOOM / IN-PERSON**
8:30 – 11:30 a.m.

Polarity Thinking: An Essential Leadership Skill
Presented by Amy Schuman, The Family Business Consulting Group

Polarities (for example, the need to honor both family and business) are special kinds of problems that cannot be solved and put away - they must be managed on an ongoing basis. They are best approached with both/and thinking rather than either/or answers. Although sometimes frustrating, polarities offer the possibility of fresh insights, new understandings, and innovative approaches to the most stubborn problems.

Key Takeaways:

• Distinguish polarities from other kinds of problems
• Recognize polarities that are prevalent in family firms
• Understand why this dynamic is particularly challenging for family enterprises
• Learn to use a Polarity Map™ to create both/and rather than either/or solutions

*Polarity Map™ created by Dr. Barry Johnson, www.polaritypartnerships.com
**May 13, 2021**

**ONLINE VIA ZOOM / IN-PERSON**
8:30 – 11:30 a.m.

**Designing, Implementing, and Harnessing an Effective Board for Your Family Enterprise**
*Presented by Babetta von Albertini, Institute for Family Governance*

This program will be divided into two parts: first, we will focus on how to build a first-time active board and will address typical fears and misconceptions of controlling owners, including the reluctance of bringing in independent board members. Second, we will focus on how to maximize the value of an active board as the company evolves over time.

**Key Takeaways:**

- Learn to think strategically about the design of your board
- Define the skills and capabilities family and independent directors need for your board to be effective (filling the gaps through a board matrix, etc.)
- Learn how to develop family members for board service
- Tips for managing the board’s relationships with key stakeholders: the owners, the family, and the executives

An afternoon round table discussion will be offered with this program. Visit uwfbc.org for details.

**NOTE:** In-person events will be scheduled as permitted by the Dane County Health Department. All in-person gathering health and safety guidelines will be followed and enforced.

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**Be Our Guest**

Are you interested in attending one of our upcoming programs? Family members and key leaders of family-owned businesses are invited to join us as a guest. There is no cost for you to attend. Advance registration is required.

*Previous guests and past FBC members, please contact Sherry Herwig prior to registering for information and fees. 608-441-7347 or sherry.herwig@uwfbc.org*
Food for Thought
Online-only via Zoom

Family Business Center sponsors share their expertise and present important and timely business topics.

- **Wednesday, September 23, 2020** Reinhart Boerner van Deuren
- **Thursday, October 22, 2020** Resonant Capital Advisors
- **Thursday, November 5, 2020** Aspiriant
- **Thursday, December 3, 2020** SVA
- **Thursday, January 12, 2021** BDO
- **Thursday, February 18, 2021** Associated Bank
- **Tuesday, March 30, 2021** Johnson Financial Group
- **Wednesday, April 21, 2021** DeWitt Law Firm

Visit [uwfbc.org](http://uwfbc.org) for program descriptions.

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*FBC has long provided a wealth of information and guidance to family owned businesses. It is a confidential forum for family business owners to share and learn from each other. I can’t imagine a better resource for Wisconsin's family owned businesses."

Eric Johnson, Johnson Financial Group
Round Tables
Online-only via Zoom

Monthly Round Tables provide a forum for conversation and knowledge sharing among FBC members and sponsors. Topics or areas of focus will be announced at least one month in advance. Visit uwfbc.org for more information and to register.

Future Leader Peer Groups

If you are in a position of future leadership or have recently assumed a leadership role within your family-owned business, we invite you to join one of our future leader peer groups. Getting the perspective, advice, and support you need from like-minded individuals keeps you moving forward, professionally and personally.

Peer groups are facilitated by a family business expert. Non-members of the FBC are welcome to join peer groups.

“The opportunity to visit and get to know other businesses that attend FBC programs makes for a membership that we’re proud to be a part of.”

Doug Dittmann, Neckerman Insurance Services

BECOME A MEMBER TODAY

We are proud to be a member-driven organization specifically for family-owned businesses. With all that is going on in the world, now is the time to invest in the future of your family business. Join a community of peers from across the state to share relevant information and build a network that will support your family and your business while driving success for all.

To find out more about joining the Wisconsin Family Business Center community, please contact Sherry Herwig at 608-441-7347 or sherry.herwig@uwfbc.org
Wisconsin Family Business Center Member Benefits

Being an FBC member connects you with the people, education, and resources that you need to build stronger family relationships and a better family business.

Supportive Community
Engage with family business owners, next generation leaders, and key employees who understand the challenges and opportunities of a family business and get what you are going through.

Speaker Series
Acquire knowledge, gain valuable insights on family business trends, and learn new skills that can be applied to your family and business.

Food for Thought
Stay informed on business topics pertaining to legal, tax, banking, and wealth management that are important to the success of a family businesses.

Round Tables
Learn from and connect with other members and sponsors through small group discussions on topics that are important to you.

Peer Groups
Collaborate in confidential forums with individuals that share similar experiences and backgrounds to work through sensitive issues and critical business topics.

Members Only Website Section
Members have access to recordings of past presentations, PowerPoint slides, and handouts.

Networking
Get to know some of the best people around through FBC programs and events.

Reciprocity
Participate in the Loyola Family Business Center Institutes (Stewardship, Next Generation Leadership, Governance) at the Loyola FBC member price. Learn more: www.luc.edu/leadershiphub/centers/familybusiness/programs/

Resources
We can suggest resources, provide referrals (coaches, consultants, facilitators, etc.) and facilitate connections to the UW. New this year - Assistance with board member search through Private Directors Association.

Discount
Receive a 20% discount on more than 70 professional development programs offered through the Wisconsin School of Business Center for Professional & Executive Development. Learn more: uwcped.org

Our Membership Promise To You
We respect your privacy as we understand most family businesses are private enterprises. We do not share your email, family matters, business operations, or financial information.
SAVE THESE DATES!

September 15, 2020
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October 8, 2020
Next Generation Capabilities: Technology and Workforce Opportunities for Family Enterprises

November 12, 2020
2021 HR Trends: New World of Work -- Are You Keeping Up?

December 10, 2020
Weathering the “Storms”: the Vermeer Family Business Story

January 28, 2021
Facing Bias + Inclusive Hiring

February 11, 2021
The Power of Positive Conflict

March 11, 2021
Polarity Thinking: An Essential Leadership Skill

May 13, 2021
Designing, Implementing, and Harnessing an Effective Board for Your Family Enterprise

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Learn More ➔ uwfbc.org