

| Breakout Session Descriptions |

Business Development | A Road Map to Great Sales and Profits

SESSION DESCRIPTION

Two things limit the growth of any organization: its salespeople and its sales process. Many of today's leaders have question marks about their salespeople and wonder if they're engaged in the right activities. Typically, organizations rely on tribal knowledge, assumed best practices and worse, putting their top performers in sales leadership roles. The result? A recipe for stagnation and unreachd potential! This session will introduce attendees to field-tested best practices for developing the right sales process and driving results through effective coaching methodologies.

PRESENTED BY

Les Lent, Owner, Lent Enterprises, LLC

PAGA Law | How to Protect Your Family Business from Employment-Related Lawsuits

SESSION DESCRIPTION

Attendees will learn what steps to take immediately to protect their family businesses from employment-related lawsuits alleging discrimination, harassment, retaliation, wage and hour violations, wrongful termination, and more. The current trend of wage and hour class action lawsuits alleging violations of the Unfair Competition Law (UCL) and the Private Attorneys General Act (PAGA), can devastate a business and affect a business owner or manager in his or her personal capacity.

PRESENTED BY

Robert L. Rediger, Lawyer, Rediger Labor Law LLP
Candice K. Hanratty, Lawyer, Rediger Labor Law LLP.

Family Dynamics | When Family Friction Catches Fire: Practical Advice for Avoiding Interfamily Litigation

SESSION DESCRIPTION

Tension between family business owners, trustees, and beneficiaries can boil over into litigation that strains relationships, causes great expense, and threatens to destroy the family and the company. By exploring real-life high-conflict case studies, participants can better understand potential minefields in trust and corporate management and receive practical advice they can incorporate into business and estate planning practices to avoid family disputes.

PRESENTED BY

Tammi Griswold, Senior Vice President & Senior Fiduciary Advisory Specialist, Wells Fargo Private Bank
Meghan Baker, Partner, Downey Brand LLP
Jeff Galvin, Partner, Downey Brand LLP

Succession Planning | In It For the Long Haul: How Succession Readiness Keeps Family Businesses Strong

SESSION DESCRIPTION

Many companies get caught by surprise by succession and transition challenges; human nature shifts the focus on taking care of today's business, but leaves them ill-prepared to deal with inevitable change. Like it or not, people will change companies, leaders will retire or pass away, and companies will grow in ways that require more leaders. Drawing from his personal experiences as a founder of a family business, Robert Sher will discuss how companies must plan for succession by cultivating talented people, dealing with the unexpected, and ensuring a smooth transition from one leadership stage to the next.

PRESENTED BY

Robert Sher, Founding Principal, CEO to CEO, Inc.