|Breakout Sessions Descriptions|

#4 Business Development | Two Things Holding you Back: 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 unreached 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

#5 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, Chief Executive Officer, Mastering Midsized

6 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 L. Griswold, CTFA, Vice President - Private Wealth Advisor, U.S. Bank Private Wealth Management
Meghan Baker, Partner, Downey Brand LLP
Jeff Galvin, Partner, Downey Brand LLP