

# *Management & Consulting*

## **Alliances & Joint Ventures – If You Can't Beat 'em, Join 'em**

Businesses usually need employees, time, money, and expertise to take advantage of a business opportunity. In many cases, a company does not have all of the required elements. This session will explore the pros and cons of creating an alliance or joint venture to take advantage of an opportunity. In most cases, the upside return is reduced, but the downside risk is also reduced. The speaker will note how to increase the odds of successfully structuring an arrangement that meets the objectives of every participant, and the many pitfalls to avoid.

## **Business Plans – Taking Control of Your Business' Future**

As a practical matter, to obtain a bank loan or venture capital, a written business plan is often needed. This session will address many practical issues including: what is a well written business plan? Who should draft it? What should be included? How long should it be? What are the common mistakes made? The speaker manages a venture capital fund and has reviewed almost 1,000 business plans. He'll share his experience with you, and explain why a written business plan can increase the odds of having a successful business.

## **Buying or Selling a Business – Doing it at the Right Time, the Right Way**

Buying or selling a business is often the largest transaction the business owner will enter into. They get one chance to do it right. The right moves can bring financial success to them and their families. Mistakes can bring disaster. This session will highlight critical issues that should be addressed, both from the buyer's viewpoint and the seller's. Numerous pitfalls will be noted.

## **Creating Rain-Makers**

Every business needs revenue to grow. This session will focus on why some individuals can generate new business, while others cannot. The speaker will explain what great salesmen or rain-makers do to generate business. More importantly, it will explore what we learn from them. This session will be invaluable to everyone who attends.

## **Financial Reform – Are We Safe Now from Future Meltdowns?**

Congress responded to the financial meltdown by enacting the most comprehensive financial reform since the 1930s. This session will recap the new legislation and explore whether the new law will prevent financial meltdowns in the future. The changes that were made, and what proposed changes were not made will be highlighted. Finally, the most likely consequences of the new legislation will be considered.

## **Franchising Your Business – Want to be the Next McDonalds?**

Should an entrepreneur start his/her own business or buy a franchise? The owner of an expanding business can either add its own new locations or it can sell franchises. The advantages and disadvantages of franchising will be explored. The speaker will address the issues from both perspectives: The franchisor's and the franchisee's.

## **Growing Your Business in a Recession – Getting Ahead Despite the Conditions**

The recession has adversely affected many businesses. This session will explore ways any business can increase both its top and bottom lines, despite a recession. The speaker, who manages a venture capital fund, will note the options a company has, the issues that should be addressed, and some pitfalls to avoid. This session will focus on practical solutions, not theory.

## **Healthcare Reform – Getting Well in America**

In March, 2010 sweeping healthcare legislation was enacted. This session will summarize many of the changes made by the new law. It will describe what the problems were before the reform and how the new law addresses them. A prediction of the likely consequences of the new law will be given, and the problems that were not addressed will be summarized.

## **Increasing Your Global I.Q.**

Everyone is affected by what happens throughout the world. Most understand that they would do better in their business and investments if they knew more about the changes going on around them in economics, politics, technology, demographics, and culture. This **new and cutting-edge session** is a potpourri of current mega-trends, issues and developments throughout the world and may include ones that are not even currently contemplated.

## **Innovators and Inventors – Learning From Those Who Have Made a Difference**

To be competitive, businesses must constantly innovate and/or invent to get better. Significant lessons can be learned from those who invented and innovated successfully in the past, like Thomas Edison, Henry Ford, Bill Gates, Sam Walton, and others. What did they do? More importantly, what can we learn from them and apply to our own businesses?

## **Leadership – Developing the Next Washington or Lincoln**

Leadership is important in business, but what is leadership? While some leaders may be born with that talent, other leaders can be developed. Leaders share some of the same characteristics. This session will address what these are, why leadership skills are important for every organization, and how leaders can be developed.

## **Planning for the Business Owner – Protecting the Family’s Jewel**

For many business owners, their business is their most valuable asset. However, many do not have MBAs or formal education in business. Many owners are looking for practical advice. They need advice as to whether they should expand or contract their business, how they can realize the value of their business, and how their business fits into their overall personal plan. This session will also address how CPAs can be more effective business advisors.

## **Raising Capital for a Private Company – Getting the Fuel to Propel a Company**

Many private companies need to acquire capital. Some may obtain it from family and friends, some from “angel investors,” and some from venture capital funds. This session will provide an excellent overview of the legal, financial, and practical issues that arise when capital is raised from investors. Issues will be addressed from both the company’s viewpoint and the investors’. The speaker, who manages a venture capital fund, will explain a number of the best practices and the pitfalls.

## **Starting a New Business – Getting Off On the Right Foot**

With so many employees being laid off, and new jobs so hard to find, many people are starting their own businesses. Unfortunately many, if not most, will ultimately fail for a variety of reasons. This session will highlight numerous pitfalls that new business owners often make. The speaker, who manages a venture capital fund, will offer many suggestions and tips to help get a new business off to a good start.

## **Succession Planning**

Many private business owners have an important question to answer: Should they sell their business to an unrelated party, or should they try to transfer their business on to a family member or to key employees? Succession planning, and the transfer of ownership and management to the next generation, will be the focus. The best practices will be explained, and also the pitfalls to avoid.

## **The Three Keys to a Successful Business – The Critical Elements**

G.E.’s former C.E.O, Jack Welch, has written that business comes down to three key elements: (1) customers; (2) employees; and (3) cash flow. He advises that if you manage these three elements effectively, you can have a successful business. This session will explore each of these three elements. The lessons learned can be applied to any kind of business including an accounting firm or can be used to advise clients.

## **Turning a Business Around – Like a Baby, It Ain’t Gonna Change Itself!**

Many businesses are in trouble to some degree. This session will focus on the action that needs to be taken to improve a business, and the obstacles that must be overcome. Presented will be a five step plan, and each step in the process will be explored. The first step is to make an honest assessment of the current condition and trends. Highlights will be on the options a company has, and the focus will be on practical action, not theory.