Our Strategic Partners

Baker/Neuman/Noyes is known nationally as a leader in the accounting profession, with offices in Manchester and Portsmouth, New Hampshire; Portland, Maine; and Boston, Massachusetts. We specialize in delivering audit and accounting, tax, and risk and business advisory services to family businesses. From succession planning, estate and gift tax planning techniques to corporate and individual tax planning and compliance, we provide the guidance you need in all areas of accounting, taxation and business advisory. Helping family owned businesses thrive is an important part of what we do. Call Tim Hepburn or Jeff Wheeler at (800) 244-7444 or visit www.bnncpa.com for information about how we can help you.

MassMutual Financial Group is represented by family business specialist, Edward F. Mullen, and Andrew D. Lee. They are both highly experienced financial advisors and committed to assisting family businesses as demonstrated by their continuous sponsorship of the Center for Family Business for over 20 years. Both Ed and Andy provide insurance and financial services to the family business to allow for the successful transfer of ownership and leadership to the next generation. For more information, contact Ed at emullen@financialguide.com or Andy at andrewdlee7@gmail.com.

Optima Bank & Trust is a locally owned commercial bank serving New Hampshire and Southern Maine. The Bank’s founders, Daniel and Pamela Morrison, set out to create a bank that would offer the latest banking technology and deliver an extraordinary level of personal service to its clients. Optima Bank’s local knowledge and ability to make decisions locally, provides a great advantage to its clients. The Bank understands entrepreneurial families and small and medium-sized businesses and recognizes that they are what make our communities great places to live and work. Optima is a true community bank and serves personal clients as well as businesses. Optima Bank & Trust has full-service branches in Downtown Portsmouth, at Pease International Tradeport, in North Hampton and Stratham, and has loan offices in Dover and Bedford. To learn more, please visit www.optimabank.com or give Dan or Pam a call at (603) 433-9600.

Moitoza Consulting is a New Hampshire-based consulting firm serving small to medium size family enterprises and business partnerships in New England and beyond. For over 25 years the firm has assisted these businesses with succession planning, conflict management, executive coaching, strategic planning and organizational development. Moitoza Consulting offers a pragmatic and personal level of planning and problem solving which honors both the needs of the business and the integrity of the family. The firm uniquely blends its expertise in contemporary business management and psychology into one consultation experience. For more information call Everett Moitoza, Ed.D., M.B.A., at (603) 964-2111 or visit www.moitoza.com.

Management Planning, Inc. (“MPI”) is a business valuation and corporate finance firm with a long tradition of serving family businesses. For 75 years, MPI has valued companies across a broad spectrum of industries to meet the corporate, succession planning, financial accounting, and estate and gift tax needs of its clients. Our professional services are widely acknowledged for their accuracy, thoroughness, and reliability. We provide expert testimony and support services when necessary. This has led to the building of long-term relationships with business owners, their families, and advisors. To discuss how we might help with your specific needs, please call or email Elliot Rotstein in Boston at (617) 892-6078, erotstein@mpival.com, or Bill Cranshaw in Hartford at (860) 651-8185, bcranshaw@mpival.com, or visit www.mpival.com.

Pierce Atwood advises family and closely-held businesses and their owners with respect to shareholder agreements, buy-sell agreements, and succession planning, often working in tandem with our colleagues in the Trusts & Estates Practice Group. We have a great deal of experience in handling disputes between shareholders in these types of businesses, including both asserting and defending against “freeze-out” claims and similar intra-shareholder disputes. Pierce Atwood LLP is a regional firm with nearly 140 attorneys providing a full array of legal services in New England and beyond. We are dedicated to providing top quality service on a timely basis to meet our clients’ legal and business needs. For more information, please contact Wilfred L. “Jack” Sanders, Jr at 603.373.2001, Jamie C. Baker at 603.373.2006 or visit www.pierceatwood.com.
Leadership Development Program Curriculum 2015–2016

Module 1: November 10, 2015 (Tuesday)

Effective Leadership in Family Businesses

Our opening module has two objectives. The first is to begin the process of building a learning community where people are comfortable sharing ideas and taking the risks involved in learning and practicing new skills. The second objective is to work together to build a definition of effective leadership in a family business setting. Two leadership concepts will be introduced: Authentic Leadership and the path to becoming an authentic leader, and Emotional Intelligence and its place in a family business. We will view videotapes of effective leaders in action and discuss our own experiences leading and following, and observing a variety of leaders in different situations.

Module 2: December 8, 2015 (Tuesday)

Developing Self-Awareness & A Personal Vision Statement

In this module we aim to answer the question: “Who am I and what does the family business mean in my life?” Self-awareness is the foundation of effective leadership. Every decision a leader makes is influenced by values, personality, preferences, biases, strengths and weaknesses. Self-aware leaders understand their biases, take advantage of their strengths and actively compensate for their weaknesses. This module is designed to build participants’ self-awareness and to begin the process of thinking through one’s vision and goals for the future including how each participant imagines his or her future role in the family business. Personality and values assessments will be used to help participants increase awareness of their unique history, personality, deeply held values, motivations, and hopes for the future. Lastly, participants will be placed into pairs or trios and given an assignment that involves visiting each other’s workplaces to conduct interviews, and gain insights and information that can assist one another in better understanding their strengths, weaknesses, and blind spots.

Module 3: January 6, 2016 (Wednesday)

Motivating Employees in a Family Business

Effective organizations need employees who bring their energy and best attitudes to work every day. This module will include an in-depth discussion of tried and true motivation theories and techniques. We will analyze the relevance of these ideas about motivation for our own family business environments. We will also discuss how to build a positive business culture that brings out the best in employees. We will also discuss how to manage our own energy and motivation in the family business.

Module 4: February 10, 2016 (Wednesday)

Leadership Skills Feedback: Personal Strengths and Opportunities for Development

In this module participants will receive feedback from multiple sources including: (1) their partners who have visited their workplace and interviewed their co-workers and family members, and (2) a 360-degree competency assessment completed by themselves, their co-workers, friends, and family members. The module will focus on working with and fully understanding the feedback, including reconciling how others view their strengths and developmental opportunities versus how participants view themselves. Participants will coach each other to fully comprehend the feedback and to begin the process of developing goals and action steps for personal development. The feedback and coaching will be used to further develop each participant’s Personal Strategic Plan (PSP).

Module 5: March 9, 2016 (Wednesday)

Building a Synergistic Team Culture

One of the most important developments in the practice of effective leadership in the past two decades has been the idea that increased employee empowerment and a reliance on teamwork can increase the speed and effectiveness of decisions and build a more entrepreneurial work environment. For example, since 2012, over 80% of Fortune 1000 companies have structured much of their work around teams. In this module, we will learn about the benefits of teamwork and the strategies and behaviors necessary for building a cohesive, high-performing team culture. Participants will learn the fundamentals of team leadership including how to facilitate successful meetings and develop an environment that encourages trust and collaboration. Exercises, case studies, and participants’ own team experiences will be discussed.

Module 6: April 6, 2016 (Wednesday)

The Effective Management of Conflict and Difficult Conversations

Leaders engage in difficult conversations and manage conflict on a daily basis. One of the greatest challenges is determining when differences of opinion and style are healthy and productive (for example, healthy debate) and when they can hurt morale and productivity. Effective leaders must know how to confront difficult issues and difficult people while maintaining good relationships and trust. In this module, we will discuss and role-play how to manage difficult conversations so that both honesty and respect are maintained. We will also identify each participant’s preferred way of handling conflict and identify effective strategies for managing different types of conflicts.

Module 7: May 4, 2016 (Wednesday)

Becoming a Strategic Leader in a Family Business

Effective leaders understand the needs and goals of those they lead. They also think and plan strategically for the future in order to build and lead a business that continually meets those needs. In this module we will discuss the role of strategic planning in family business and the need for a parallel planning process that plans for the needs of both the business and the family. We will also discuss the importance of encouraging family participation in strategic planning and the importance of planning well ahead for the next generation of managers and leaders. Finally, we will rehearse the presentation of our Personal Strategic Plans, which will be presented in our final class.

Module 8: June 1, 2016 (Wednesday)

Graduation and Presentations of Personal Strategic Plans (Families Invited)

This session will represent the culmination of our learning and development over the eight months of the program. Participants are invited to invite their families and/or relevant leaders to this session to hear the presentation of their Personal Strategic Plans (PSPs). There will be a review of the program with participants sharing what they have learned and what they are taking away from the program. A family business specialist will join the group to lead a discussion focusing on the transfer of leadership and ownership in the family business and the role that each generation plays in the process.