

Next Generation Leadership Forum



GenSpan, Inc.'s 2017-2018 Next Generation Leadership Forum includes four one-and-a half day leadership development sessions.

At the beginning of the 2017-2018 Forum year, participants will work with their direct supervisor to identify a specific strategic opportunity or performance gap that is of significant importance to their company. Participants will spend the four Forum meetings developing an action plan to capitalize on the opportunity or close the performance gap. The Forum's facilitators will customize each session to focus on family business issues relevant to participants' projects. The Forum's peer group format will provide additional support and ideas from different industries to help participants create and execute their plans.

Over the course of the year, the Forum's facilitators will provide instruction on:

- Strategic opportunity identification
- Performance gap analysis
- Financial evaluation
- Leadership principles (such as leading change initiatives and shaping company culture to drive change)
- Communication and governance (including boards of directors and family meetings)

As former family business executives and current professors at UNC-Chapel Hill, the facilitators, Steve Miller and Cooper Biersach, have decades of experience in developing students and family business leaders in small group settings like the Forum. Activities and assignments are based upon Steve Miller's original research that identifies important skills that have been proven to increase the likelihood of next generation leadership success. A key finding in this research shows that the degree to which next-generation leaders tackle challenging work assignments and assume personal responsibility for their actions and decisions is strongly related to their display of emotional and social intelligence competencies, which in turn are the major drivers of their leadership effectiveness. Next-generation leaders' acceptance of personal responsibility is also strongly related to the degree to which these leaders are held accountable by others, which positively affects their engagement with work in the family firm. Focusing on a specific project over the course of the year allows Forum participants to practice taking real responsibility for a challenging project and develop skills that will help them become more effective leaders.

Meeting four times over the course of the year allows participants to learn and then practice new leadership behaviors on the job between meetings. Participants will return to each Forum meeting with new questions and insights. The format increases participants' ability to master critical skills required for business continuity, using a method of leadership development that Dr. Miller's research has shown to be effective.

GenSpan's Next Generation Leadership Forums bring together next generation leaders from all over the United States and from a variety of different industries.

Recent Forums have included leaders from family-owned firms in **California, Georgia, Illinois, Kentucky, Michigan, Minnesota, Mississippi, North Carolina, Ohio, and Pennsylvania**. Participant companies represent a diverse group of industries and have included several heavy equipment dealers, a jewelry retailer, a global plastics manufacturer, an IT services provider, a civil and electrical contractor, a commercial real estate developer, an oil and gas supplier, a highway construction contractor, and a provider of retail packaging and special events products.

"Whether your family business' succession is well under way or you're just beginning to think about the future, GenSpan prepares next generation leaders for the challenges and opportunities that lie ahead. Cooper and Steve balance research with real-world experiences in an engaging and collaborative learning environment. My GenSpan experience was especially rewarding because I left with a plan of action for my family business and my life."

**Aaron Koenig,
Koenig Equipment, Botkins, OH**

*“Participants have an opportunity to **connect with similar family business owners with similar situations**. It’s really beneficial to hear how other multigenerational family business have survived and flourished. As hard as it is to break away from your busy lives, it’s an **invaluable time to spend preparing for next generation leadership**. You also **build relationship/friendships with other family business owners that will last forever**.”*

*It’s been my experience that family business owners hold information and challenges close to the vest and rarely have the opportunity to explore with anyone outside of the business. What **differentiates this forum is that it’s a safe environment to explore a family business’ challenges with other family business owners**.*

*Family business owners should participate because they deserve to break away from their hectic lives and **spend some time on the bigger picture while investing in the longevity of their company and family.**”*

This forum gives you the tools to begin your process in preparing for a healthy multigenerational family business.”

Applicants are encouraged to secure their spot as soon as possible, since the Forum will fill up early. Twelve to fifteen participants will be selected for the Forum based upon the order of receipt of application, the individual’s commitment to participation, and the individual’s fit with the criteria below. Participation will be managed to ensure that directly competing firms will not be in the same Forum group.

Criteria for participation in the Forum:

- Next-generation family or non-family leader being groomed for leadership succession
- Education and Experience: Bachelor’s degree and 2 years of experience; or 5 years of experience minimum
- Position in company: Entry-level management minimum

Teams of 2-3 next generation leaders (family and non-family) may find it useful to attend the Forum together.

Strict confidentiality will be required of participants and facilitators.

2017-2018 Forum Dates

Thursdays from 8:30 a.m. – 4:30 p.m., Fridays from 8:30 a.m. – 12:30 p.m.

- November 30 and Dec. 1, 2017 (Biltmore Estate, Asheville, NC)
- February 22-23, 2018 (Rizzo Conference Center, Chapel Hill, NC)
- May 31-June 1, 2018 (Biltmore Estate, Asheville, NC)
- September 20-21, 2018 (Rizzo Conference Center, Chapel Hill, NC)

The tuition for the Next Generation Forum is \$12,000 and includes all materials, lunch on Thursday, and continental breakfast on Thursday and Friday.

*“The Next Gen Leadership Forum is a **truly exceptional learning experience that blends both of the Forum leaders’ extensive subject matter knowledge and real life family business experiences with those of the Forum attendees**. Both current and emerging family business leaders will benefit greatly from attending. Additionally, as a non-family executive working within a family business, I would encourage others in this role to attend as the Forum has provided me with an **invaluable understanding of the importance that effective family governance and family business leadership play in keeping a family business successful.**”*

**Marc Boomgaarden,
Non-family Executive, Valley Truck and Tractor**

**For more information, contact us:
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**Next Generation Leadership Forum
Participant Application****



****Returning Forum participants do not need to complete Section I, but should just indicate their name and complete Section II.**

I. Participant Information and Background

Name _____

Address _____

E-mail _____

Work Phone Number _____ Mobile Phone Number _____

Educational Background (schools attended, degrees earned, and year of graduation) _____

Name and Location of Business _____

Years of Operation of Business _____

Current Leader of Business and Relationship to Participant _____

Current Position in Company and Amount of Time in that Position _____

Other Recent Work Experience (past 5-10 years) _____

II. Participant's Objectives *(Please feel free to answer these questions on a separate sheet of paper)*

What are your career aspirations over the next 10 years? Be as specific as you can.

What 2-3 areas of development would you like to address in the Forum?

How will you define success at the completion of the Forum? What are your expectations?

Are there specific topics that you would like to learn about in the Forum?

Please return completed application to Kristina Magnuson at kmagnuson@gen-span.com.