
Virginia Council of CEOs

Sponsor Presentation Topics

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VA COUNCIL OF CEOS
follow the leaders

The Council enjoys the financial support of a number of businesses that are a rich resource for our members. They come not with a sales pitch, but with the goal of sharing knowledge and experience.

We encourage Roundtables to invite sponsors to present to them. Some sponsors have facilities at which they would like to host your meeting, including catering. Others may not, and would prefer just to come to your regular meeting place. If you would like to meet a particular sponsor, or have interest in a particular expertise that might be met by one of them, please contact them directly to discuss your interests and arrange the details of the visit.

When you report monthly Roundtable attendance, please also report on any sponsor visit, and give us a rough 1 to 10 (10 is excellent) rating of their presentation.

Need help? Call or email us: 804-360-2644, info@vaceos.org



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Robins School of Business, University of Richmond

Executive Education at the Robins School of Business

Strategic Consulting and Advising

Robins' renowned faculty can help your business define and clarify objectives, perform operational needs analyses, and develop workable plans to address challenges and opportunities. Our approach is collaborative and tailored to your needs.

Facilitation

Our faculty are skilled at professionally facilitating meetings and events, allowing executives to focus on the content of their business. We have helped organizations define their values, develop strategic plans, create talent management strategies, improve customer relationships, and accelerate projects.

Training Programs

We deliver private and public professional development classes addressing general business acumen, leadership, strategic account management, marketing and business development, negotiations, communications, and teamwork. For private engagements, we customize our courses to meet an organization's context and specific needs.

CEO Essentials is an eight-module program covering the most requested topics by VACEOs members. Each four-hour session is specifically designed for the CEO of a small or mid-sized business and immerses participants in topics such as organizing your business for growth, succession planning, data analytics, and leading effectively through change. Classes are facilitated by Robins School of Business faculty and well-qualified adjunct instructors. The learning is enhanced by the experience of the executives in the room as participants engage with each other to address the most pressing challenges of running a business.

Keynote Speaking

Based on the latest research and interactions with industry, our faculty provide engaging and well-articulated perspectives on an array of highly relevant topics at organizational retreats and conferences.

The Richmond MBA at the Robins School of Business The MBA Capstone

Capstone projects are *pro-bono, strategic consulting projects* conducted by MBA students nearing completion of the program and supervised by a faculty advisor. Do you have an important strategic challenge, but lack the resources to address it? More than 500 organizations worldwide—from corporate headquarters, to local franchises and entrepreneurial ventures—have benefitted from a Richmond MBA Capstone project. Sample projects include helping organizations develop strategies to increase revenues, enter new markets, launch new products and acquire or sell businesses. We have completed Capstone projects with numerous VACEOs companies. Yours could be next.

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Debbie Fisher, 804-289-8012, dfisher2@richmond.edu
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Warren Whitney

Scott Warren:

- The Essentials of Cash Flow Planning
- Succession Planning: Your Company's Future
- Are you getting what you need from your accounting system?
- Financial Projections – Don't forget the balance sheet!
- Enterprise Risk Management: What should be keeping you awake at night!
- Managing Your Company's Working Capital
- Financial Management for Growing Companies
- Financial Management for Non-Profits

Katherine Whitney:

- Executive Search: "Buying" and "Selling" at the Same Time
- Strategic Planning for Non-Profits
- Smooth Transitions to New Board Chairs
- Mergers of Nonprofits: Considerations, Decisions, and Implementation
- Cultivating and Engaging Board Members
- Setting the Right Expectations: Board Member Responsibilities

David Nelms:

- Aligning business goals & tech strategy: Key considerations for developing a plan
- Technology: Tips on managing resources, controlling costs, & improving performance
- Selecting new software: How to maximize results and minimize downside
- Change Management: Considerations before investing in a systems upgrade
- Business processes and technology - Which is the chicken and which is the egg?

Beth Williams:

- Harassment Awareness for Managers and Employees
- Employee Retention: Cost efficient ways to motivate your team
- Defining and living your Culture
- When to call an HR Resource
- New Managers and Supervisor training workshops (series)
- Conducting an HR Audit
- HR Basics for Small Business
- Recruiting Challenges Today
- How to Select an HRIS system

Janet Duncan:

- The Total Rewards System: Compensation Trends to Watch
- Organizational Dynamics
- Change Management

Gene Gregory:

- Budgeting 101: Budgeting for the non-Accountant
- Statement of Cash Flows: Your Key Monthly Financial Management Regimen
- Benchmarking Your Business: Effective use of Dashboards
- Preparing your Business for Sale
- Understanding the Balance Sheet for Non Accountants

Greg Herceg:

- Lessons Learned from the Trenches: Experience from the CEO Corner

Cyndy Lowery:

- Internal controls...Beyond Talking the Talk...Walking the Walk
- Introductory concepts in Forensic Accounting

Jill Swinger:

- Efficient Audit Preparation
- Teaching your Key Managers how to Understand Internal Financials
- Maximizing Quickbooks as a Reporting Tool

Contact: Stephanie Ford, 804-282-9566, sford@warrenwhitney.com

The Fahrenheit Group

Business Performance

- Cash is king and working capital rules – how to better manage and forecast it.
- Measuring the true profitability and viability of your business – it's more than an income statement.
- You have data, but do you have good information and reports to make decisions and run your business? How CFO's turn data into useful decision-making tools that drive profit.
- How to implement practical processes and controls to make your business more efficient and profitable.
- Aligning your business processes with the systems that run your business. Getting the most from your systems and training employees to be the most productive.

Sales Organizations

- How to install accountability in a sales team.
- Best practices around sales force management.
- Sales team compensation strategies
- Pipeline tracking.

Growth Strategy

- Creating growth through strategy development and execution.
- Business expansion, including acquisitions, alliances and outsourcing.
- Managing through periods of disruption.

Capital Strategies & Exit Strategies

- Finding cash in your business – optimizing your investments in assets and using other people's money.
- Selling your business and raising capital - the financial keys to success.
- Timing considerations.
- Liquidity alternatives and forms of consideration.
- Layman's guide to business valuations.
- What drives premium valuations? What are buyers looking for?

Talent

- How to identify the right time and best approach to upgrade your finance function and get the most from your investment.
- Do you have a financial advocate?
- Do you have a bookkeeper, controller or CFO? What is the difference?
- Do you need fractional or full time? Can you get results with a defined project or mentoring?
- Talent acquisition - developing a talent pipeline and driving the hiring process.

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Keith Middleton, 804-955-4422, kmiddleton@thefahrenheitgroup.com

Virginia Commonwealth Bank

In the community banking world, success is based on people! That is certainly the case at Virginia Commonwealth Bank where we know that with our experienced and engaged teammates, we promote a positive culture, attracting valuable customers, who will ultimately have great success. The more value our bank provides, the more our community and clients will benefit. We have committed to building on VCB's 80-year history serving Central Virginia and the Northern Neck as a true community bank headquartered in Richmond with experienced, locally-established bankers and state-of-the art products delivered with a true community bank spirit and approach. All decisions are made by our local bankers and management team to deliver banking with local knowledge and a sense of urgency. It's truly "Uncommon Banking" from Virginia Commonwealth Bank!

Contact: Gary Armstrong, 804-510-0950, garmstrong@vacommbank.com
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Dixon Hughes Goodman, LLP

Strategic Planning and Growth

- Thinking of selling your business? Identifying opportunities and avoiding pitfalls
- What is my business worth? Valuation considerations and focus areas to increase your value
- Thinking of buying another business? The due diligence process and considerations before you close
- Need additional capital for your business? Discussing the pros and cons of equity and debt
- Thinking of bringing on outside investors? Learn potential strategies and their advantages and disadvantages
- Have you planned an exit strategy? How buy-sell agreements provide remaining owners with control and exiting owners/heirs value from the company

Tax Planning

- We're not just in Virginia anymore – tax strategies when expanding to new states
- Concerned about cash flow? Maximizing cash flow by identifying available credits, deductions and grants
- Tax planning strategies for your business – Strategies to minimize taxes for the corporation and its owners
- Thinking of relocating your business? Tax considerations when deciding between purchasing or leasing your new building
- What was Congress thinking? Recent Federal and Virginia tax changes effecting you and your business

Employee Benefits

Considering retirement plans for your employees? Maximizing benefits to owners while also providing benefits to employees

Risk Advisory

- Cybersecurity

- Process Improvement
- Retail Controls
- IT Due Diligence related to a transaction

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Marriott & Co.

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Park Sterling Bank

Park Sterling Bank is a regional community oriented bank based in Charlotte, NC with a regional hub and eight branches in Richmond. The bank offers a full suite of retail and commercial services along with treasury & cash management services, capital markets products, and wealth management services. Our Mission is to make a difference by being big enough to provide the expertise and solutions that our clients need to meet their financial aspirations, while remaining small enough and passionate enough to care that they do.

- How to Determine Your Company's Debt Capacity
- How to Effectively Manage Your Company's Cash Flow
- Capital Markets – What Is It and How Can It Help?
- Navigating a Bump in the Road?
- Everything You Wanted to Know About a Bank, but Were Afraid to Ask

Contact: Wes York, Senior Vice President: 804-412-7972, wes.york@parksterlingbank.com
Robert Cowgill, Richmond Market President: 804-412-7978,
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Keiter

- Cybersecurity for Small – and Mid-Sized Businesses
- Cybersecurity Assessment Training
- Exit Planning: A 3-5 Year Planning Approach
- Planning for a Successful Merger or Acquisition
- Making charitable giving part of your exit plan
- Fraud Risks
- Understanding and Identifying Fraud Risks in a Privately-Held Company
- Internal Controls for Small Businesses
- Tax Planning for the Privately-held Business
- Year-end Tax Planning Strategies (Individual and Business Perspectives)
- State and Local Taxes – Keeping up with the Changes
- Creative Estate Planning Techniques
- Fiduciary Responsibilities for Employee Benefit Plans

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(Fonda can help you find the right expert at Keiter)

Insperity

Since 1986, Insperity® CEO Paul Sarvadi envisioned making business owners' lives easier by taking HR and administrative burdens off their plates. So he decided to start a company with little more than 600 square feet of space and one telephone. Since then, Insperity has grown as a result of helping clients reach their goals.

Our business model is simple: We're dedicated to helping businesses succeed by taking care of the things that could be distracting you from the bigger picture. We do this by helping you control expenses, minimize risk exposure and maximize your opportunities for revenue generation.

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Jones Lang LaSalle

Tenant Representation for Leasing Space

- Lease Renegotiation Specialist – How to take advantage of the market for maximum rental savings from your present landlord
- Relocation Strategies – How to attain Class A space for Class B prices
The Relocation Process – opportunities and challenges

Buyer Representation

- How to acquire owner occupant buildings
- How to create leverage in negotiations

Leasing / Disposition Services for Owned or Leased Property

- How to lease your space or sell your building at the highest value
- Broker Opinion of Value - What is my building worth?
- Subleasing Strategies – How to effectively sublease surplus space

Market Research & Intel

- Office market reports
- Industrial market reports
- Market relevant lease and sales comparables

Contact: Charlie Polk, 804-200-6419, Charlie.Polk@am.jll.com
Scott Harrison, 804-200-6435, Scott.Harrison@am.jll.com

Union Bank & Trust

Contact: Cary Ayers, 804-327-5740, cary.ayers@bankatunion.com
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Catch Your Limit

For over 16 years, our “guides” have worked with CEOs, from start-ups to Fortune 500 companies, to build collaborative cultures, assess leadership needs, develop high functioning teams, custom design/implement leadership development systems, and facilitate strategic retreats & team meetings. We also speak and write on a variety of leadership topics and teach at VCU’s da Vinci Center for Innovation.

Since becoming a VACEOs sponsor in 2015, we have been asked to host/kickoff roundtable meetings, we’ve spoken at the Annual CEO Retreat and at a Knowledge Network lunch. Below is a sample of our most in demand topics. Choose from these or reach out and let us know what your needs are ... we may be able to deliver for you or connect you to a resource that would best meet your needs.

Leading the Leadership Team

Every person on your leadership team needs to model the attitudes and behaviors that you are expecting of others in your organization, be cohesive in their leadership approach and be held accountable by each other and by you. In this interactive session, assess your leadership team and fine-tune your leadership approach for guiding and growing this level of leaders within your organization.

The Company You Keep – Keys to Attracting, Growing & Retaining Talent

In the past, businesses asked employees to conform to the organization's needs. Today’s leaders must attract the right colleagues, keep them, and inspire them to be engaged and to deliver. Focus on your role, the expectations you have of other leaders within the organization, strategies for continuous improvement and ways that these issues impact your bottom line.

Leading Sustainable Leadership - Your Key Players Need You

Think of your high performers. At some point, you’ve recognized their potential, nurtured their growth and given them more autonomy. But, don’t mistake their ambition and success as signals to stop being involved ... our leadership journeys are constantly evolving and the need for a trusted guide is needed now more than ever. Explore ways to help you and your top performers prevent, recover from and avoid relapsing into burnout and strategies for retention.

Courageous Conflict

Avoiding disagreements, holding back, choosing battles and not fully engaging lead to wasted time, lack of commitment, poor decision making and resentment among team members. Become a catalyst for courageous conflict and encourage others to follow your lead.

Think Smart. Think Fast.

Learn a new approach for ideation, gaining buy-in and making decisions in a short amount of time. Eliminate unproductive meetings, quit arguing, increase creativity, save time, have fun and get results.

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Tom Laughon, 804-767-1702, tom@catchyourlimit.com

Transact Capital

Exit Strategy

- What is my company worth today and how can I maximize its value?
- What should I be doing now to sell in 2017?
- I cannot afford to sell; I cannot afford not to – solution?
- What does the sale process look like and what to expect?
- Completing a successful transaction – be careful who you partner with!

For CEO Forums

- The Perfect Five-Year Exit Strategy for Large Companies
- Strategic Growth Acquisitions
- The process of identifying and completing the perfect acquisition
- Financing the acquisition
- What to expect post-acquisition

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LeClairRyan

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Adams, Jenkins & Cheatham

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John Denison, 804-323-1313, jdeniso@ajccpas.com

Spotts Fain

Succession Planning and Exit Strategies

Contact: Tom O'Brien, 804-697-2070, tobrien@spottsfain.com

The Change Decision

We bring joy to work! At *The Change Decision*, we live in-between the space of temporary change and lasting outcomes. This is where joy is often lost. We believe this is where you can create it. Our purpose is helping organizations strategically lead their teams during transformational shifts. We know (because we've seen it happen) that with the right process and engagement, you and your employees will not only achieve your goals – you'll create a culture shift that truly engages your team in ways you never imagined.

Our expertise includes complex decision-making, strategic visioning/planning/implementation, organizational change management and team engagement. Our approach is creative, unexpected and specifically suited to each leader and their people.

Presentation topics:

- Team engagement
- Leading change (e.g., company growth, internal transitions, mergers and acquisitions, strategic initiatives)
- Using business analytics to drive the change you need
- Personal resilience and adaptation
- Group decision-making
- Creativity at work
- Finding meaning at work
- Stakeholder management and communication
- Navigating team dynamics
- Leader-Team feedback
- Virtual team building
- Creating a culture of recognition and appreciation
- Building trust internally

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Endeavor Capital, LLC

Voted Best Financial Planning firm two years in a row by the readers of Virginia Living Magazine, Endeavor Capital, provides intentional and deliberate collaboration with business owners and their teams to deal with all issues related to the Risk Management, Liquidity and Long-Term Growth and Preservation of your Business. Through thoughtful discussion and understanding of a client's mission and vision as well as how they define success we coordinate and plan the path that gets them to accomplishing their ultimate objectives.

- Financial Planning 101: Components of a proper plan
- Financial Planning 202: Executing a proper plan
- Financial Planning 303: Living your plan
- Establishing a Comprehensive Benefits Strategy
- Succession plans and the future of your business
- Retirement plans 101
- Principles of Investing: Methods to creating and maintaining true financial freedom
- Integration of your business and family; family members and the business setting

Contact: Jonathan Kennedy, Jr., CLTC; (W) 804-888-9900, (C) 804-874-9531, jkennedy@endeavorcapitalllc.com

7 Hills Advisors

Commercial Real Estate Consulting and Advisory Services

- **Why is conflict free tenant representation critical** when negotiating real estate transactions?
- **Are you in the right amount of space?** What is your evolution from a real estate space needs perspective? Tools we utilize to evaluate current and future space needs in order to maximize efficiency, minimize unnecessary occupancy costs, and create the most productive work environment possible.
- How to save time, mitigate risk, maximize flexibility, and reduce your occupancy costs?
- **Your space is an extension of your brand.** Your space should reflect your mantra. How to secure the right kind of space in order to increase productivity, creativity, collaboration, and a sense of community.
- **Project Management.** How to ensure that any renewal, relocation or expansion of space is done in the timeliest and most cost effective manner possible.

Contact: Christina Jefferies, Christina@7HillsCRE.com

Cornerstone Valuation

- Business valuation
- Estate planning
- Strategic corporate financial management
- Buying/selling businesses (Mergers & Acquisitions)
- Establishing values for partner buy-ins and buy-outs

Contact: Greg Waller, 804-787-3611, hgwallier@cornerstone-valuation.com

- **WAGE AND HOUR.** Small mistakes in failing to pay overtime add up quickly, especially when you roll in the potential for paying damages (double the amount due) and attorneys' fees (yours and theirs if the employee wins). The new guidelines are expected to raise the salary basis requirement from \$23,660 to \$50,440.
- **INDEPENDENT CONTRACTOR.** Such arrangements are under extreme scrutiny and not just if you are Uber. The federal government as well as state governments are looking closely at all independent contractor arrangements.
- **HANDBOOKS.** The National Labor Relations Board has flexed its muscle and held that many long-accepted Handbook provisions in non-union workplaces violate workers' basic rights under the National Labor Relations Act. Adverse job actions based on "unlawful" company policies may give rise to unfair labor practice charges with the resulting job reinstatement, back pay, and/or front pay and interest charge potential.
- **GENDER IDENTITY AND SEXUAL ORIENTATION.** There has been pressure on Congress to amend the anti-discrimination statutes to clearly include "gender identity" and "sexual orientation" as named protected categories. Congress has not acted, but the Obama Administration has. The Department of Labor issued new rules allowing employees to take Family and Medical Leave Act leave to care for a same-sex spouse, and revised regulations relating to federal contractors to add gender identity and sexual orientation as express categories of protection. Additionally, the EEOC has explicitly held that its position is that "sex" discrimination under Title VII also includes gender identity and sexual orientation discrimination.
- **HOW TO TREAT PREGNANT EMPLOYEES?** While the U.S. Supreme Court ruled this year that pregnant employees have to be granted accommodations that are granted to other workers similar in their ability or inability to work, it did not clearly define how employers should treat pregnant employees. If a company's policy puts a significant burden on pregnant workers, the employer's legitimate non-discriminatory reasons must be strong to justify the burden. If not, an inference of discrimination is created.
- **MARIJUANA.** Marijuana remains illegal under federal law, but several states allow personal use and other states allow medical use only, while others continue to ban all use consistent with federal guidelines.
- **AGING WORKFORCE.** The recession has kept many workers in the workforce longer than traditional "retirement" age, and many remain out of fear for their economic future. More age-based comments are giving rise to age-based claims. Early retirement programs may violate the Age Discrimination in Employment Act.
- **BAN THE BOX.** Banning from employment applications questions about criminal history continues to be the focus of the Obama Administration as well as several state governments. If certain crimes are not statutorily a barrier to employment with your business, you may want to voluntarily consider banning the question(s) from applications in order to remove the risk of challenge on the basis of discrimination.
- **RELIGIOUS ACCOMMODATION.** The U.S. Supreme Court has held that an applicant can bring a Title VII discrimination claim when the employer has sufficient information to be aware of a conflict between the applicant's religious practice and a work policy.
- **WELLNESS PLANS.** As insurance costs rise, employers continue to implement wellness plans where employers offer limited monetary incentives for employee participation in wellness programs as allowed by the Affordable Care Act. This year, however, it has become clear that the EEOC and the Affordable Care Act are on a collision course as the EEOC has questioned whether or not wellness programs and financial inducements violate the ADA.

Avenue 8 is a woman-owned leadership development and strategic operations practice. Danessa Knaupp, founder and CEO, brings compassion, candor, and pragmatism to leaders and their teams. Danessa is available to present on the topics below. Don't see what you need? Danessa is happy to customize a conversation specific to your roundtable's needs.

Leadership Development

- Shifting your leadership perspective (because what you don't see is costing you money)
- Balancing competing priorities
- Taking your leadership game to the next level
- Managing the multiple changes of rapid growth
- Defining your strategic path and purpose
- Conducting difficult conversations with compassion and candor
- Finding your mojo
- Exploring your leadership preference
- The power of a pause practice (why all leaders should be moving, meditating, and reflecting)
- The ROI of executive coaching: when you should invest in a coach and when you're wasting your money

Team Management

- Recognizing and rewarding employees
- Defining and executing a performance management plan
- Setting clear expectations
- Mastering team communications
- Super-charging performance
- Motivating teams
- Giving and receiving feedback
- The change cycle and how to master the curve

Strategic Operations

- How to define and measure team performance
- How to get from here to there: a practical guide to building a strategic plan
- Breathing life into your strategic plan
- Connecting your strategy to your purpose
- The messy middle of change: what really matters?
- What's really missing: conducting a gap analysis

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