

August "Recharge & Review"

"Take time to recharge your batteries. It's hard to see where you're going when your lights are dim."

- Robert Connelly

We're all guilty of this - work non-stop until you burn out. But is that what's best for your customers? For your company and co-workers? For you?

Even if the summer months aren't your slowest season - it's vacation season! - so take some time for yourself to recharge. Whether it's time spent with family, friends or just yourself, it will allow you to reflect and review so that you can restore yourself to be leaner, faster and better for your business.

Because, after all, it's hard to be the best for your business when you're not your best self.

INSIDE THE COMMUNITY

We asked an IFBE Insider what recharging and reviewing means to her family's business...



Susan Wilusz,
Value Management, Inc.
IFBE Member 2017

Q. With members of the first and second generations working together in your family's business, do you take

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Upcoming Events

**Save the date for our
Family Business
Legacy Speaker Series
featuring Christian Haub
of the Tengelmann Group**

Wednesday, October 4, 2017
11:30am-1:30pm
Saint Joseph's University

**MEMBERS & PARTNERS:
FREE
OPEN TO THE PUBLIC,
LIMITED SEATING
AVAILABLE**

More details to come!



**Did you know we host
Peer Advisory Groups?**

any time to come together as a family outside of the business during the summer?

A. My dad (founder of Value Management Inc.) has a house in North Cape May so, we spend a lot of our weekends together in Cape May over the summer. We enjoy going kayaking, stand up paddle boarding and just relaxing on the beach together. It's funny because most of my time at the shore is spent with my dad and my sister Kate, who also works with us, so we jokingly refer to it as the Cape May office!

Q. What are some of the ways your business goes about evaluating the previous year and how does that analysis affect planning for the future?

A. We subscribe to the entrepreneurial operating system ("EOS") which is a set of concepts and tools that allow us to instill focus, discipline and accountability throughout our management team. So, rather than looking at a total year, we break our review and evaluation into 13 rolling week chunks. Our evaluations and planning are done at our weekly, quarterly and annual EOS meetings. Not only do we do short-term planning through EOS but we also look at the mid-term (where we want to be in three years and how to get there) and what VMI will look like in ten years. It's a very organized process that forces us to be proactive in planning VMI's future.

Q. How do you get your team excited about the year ahead? Are there any specific initiatives that you are particularly excited about?

A. Since we participate in the EOS program, we are always planning and looking ahead. The next twelve months will include attendance at several national and regional conferences. The VMI team also looks forward to a full slate of presentations that we make to various audiences. Each year also brings renewed optimism that VMI will continue to grow and diversify. Part of that growth and diversity will come from our merger and acquisition services so the team is always excited to grow our transaction pipeline and best of all, close deals!! We are excited to plan and host various events, especially those involving fine wine and gourmet meals, with the goal of getting to know our clients and referral sources better!

Value Management Inc. is an Investment Banking and Advisory services firm specializing in mergers and acquisitions (buy and sell side) and business valuations. We help buyers and sellers to meet their goals and objectives when acquiring/selling their businesses and help business owners assess, understand and realize their value.

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Media Must-Sees



Check out the pictures from our July seminar with PCEO. There was a lot to be learned about continuing the business.



WATCH sisters Susan & Kate Wilusz of Value Management, Inc discuss working in the family biz as the 2nd generation.



New "Success by the Numbers," a monthly column to help your family business maintain its entrepreneurial spirit and family unity! READ Richelle Payne's article on *4 Insights to Boost your Bottom Line.* [Click Here to Read.](#)

AUGUST EVENTS

Relax and enjoy your summer!

We'll see you again in September to kick off our fall programming.



SAVE THE DATES

Wednesday, September 27, 2017

Family Business Seminar: Steps to Assembling an Effective Advisory Board

8-10:30am

Saint Joseph's University

Members & Partners Only

[RSVP](#)

Wednesday, October 4, 2017

Family Business Legacy Speaker Series featuring Christian Haub

11:30am-1:30pm

Saint Joseph's University

Members & Partners: Free

Open to the Public, Limited Seating

Thursday, November 9, 2017

Family Business Seminar: The Value & Role of Family Meetings

8-10:30am

Saint Joseph's University

Members & Partners Only

[RSVP](#)

Thursday, December 7, 2017

Holiday Cocktail Reception

5:30-7:30pm

Location TBD

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