



## The Minnesota/Dakotas Chapter

Thursday, February 8, 2018

Doubletree Park Place Hotel  
1500 Park Place Blvd., Minneapolis, MN  
952-542-8600

### PROGRAM AGENDA

- 7:30 – 9:30      CEO Roundtable – Courtyard Room 4 – 1<sup>st</sup> floor  
                         CFO Roundtable – *Courtyard Room 5* – 1<sup>st</sup> floor  
                         HR Roundtable – Courtyard Room 6 – 1<sup>st</sup> floor
- 8:30 – 10:00    Registration for Chapter meeting – 2<sup>nd</sup> floor
- 9:00 – 9:45      ESOP Basics – Terrace Ballroom 4
- 9:00 – 9:45      Ask the Experts Roundtable Discussions – Terrace Ballroom 1-3
- Legal, Administration, Trustee, Appraiser, Accountant, ESOP Committees
  - Jim Vogl, Deb Karlsrud, Kevin Weise, Pat Schmidt, Brian Sweeney, Jason Wellman

### General Session – Terrace Ballroom 1-3

#### **10:00 – 10:30    Company Profile – AVI Systems – Eden Prairie, MN**

Jeff and Travis will share their story of AVI Systems' growth from a small supply company born 40 years ago in North Dakota into a global provider of audio visual solutions across the spectrum of commerce, business and education.

*Jeff Stoebner, President and CEO, joined AVI Systems in 1993. He learned the ropes by working first in technical services, then becoming a sales representative. He also spent time as a Regional Vice President, as well as AVI's Vice President of Marketing and Chief Operating Officer. As President and CEO since 2009, Jeff is responsible for the overall planning and direction of AVI Systems.*

*Travis Kjerstad, Technical Services Manager, has been employed with AVI Systems for more four years and is currently the Technical Services Manager for the Eden Prairie, MN office. Travis is responsible for management and leadership of all aspects of the AVI technical services team for the Eden Prairie region, including engineering, design, programming, installation, project management, and the service team. Travis's passion for excellence and ability to inspire the AVI Systems technical team is critical to the success of complex projects. During this time Travis has performed in a few capacities for AVI Systems.*

**10:30 – 11:30 Rich Chapman, Chartwell – Leadership Is Everyone’s Business**



*As former CEO of a 400-person organization and personal mentor to a wide range of business leaders and professional athletes, Rich believes leadership is everybody’s business. He will speak to the audience about the keys to being a person of positive influence and why the pursuit of personal excellence is the greatest driver of high performance.*

Rich Chapman is currently Managing Director with Chartwell Financial Advisory, a boutique consulting firm specializing in corporate finance, ESOP formation, and business valuations. He is a published author on the topics of leadership and character development, a frequent keynote speaker, and a nationally recognized authority on the use of funding strategies to manage long-term corporate liabilities.

Rich's two published books are *All-Pro Wisdom: The Seven Choices That Lead to Greatness*, and *The Greater Game*, which he developed in conjunction with the National Football League.

Rich's leadership experience can be found on his personal website: <http://chapmanleadership.com/>

**11:30 – 12:15 Chapter Business**

**12:15 - 1:00 Lunch – Lower Atrium**

**1:15 – 2:15 Technical - Maintaining an Ownership Culture Through Mergers and Acquisitions  
Terrace 1-2**

ESOP organizations have a unique and collaborative culture. But what happens when you add three other private organizations to the original company over the course of three years, doubling company headcount? How do you communicate business changes to all employees involved? How do you merge company cultures in a way that preserves, and expands, an ownership culture? How do you ensure that ownership and being an ESOP holds meaning for a mass of new employee owners who are years away from building ESOP accounts and vesting? Join us as we walk through a case study on how Padilla managed this challenge and emerged with a stronger internal culture and external brand.

***Amy Jensen, Padilla; Sarah Kalhorn, Padilla***

**1:15 - 2:15 Communication – Engaging Millennials Through an ESOP!  
Terrace 3-4**

This exciting session not only focuses on how to engage millennials, but also how to engage your entire workforce through the unique nontraditional benefits an ESOP provides employee owners. I will provide you with seven key things that all millennials are looking for in their employer along with the four key emotions that cause employees to become engaged at work. This session will include several ideas to improve retention rates and potentially attract more qualified applicants.

**Jason Wellman, ESOP Partners**

**2:15 - 2:30 Break**

**2:30 - 3:30 Technical – ESOP FAKE NEWS  
Terrace 1-2**

The panel of technical experts will address questions and misconceptions around setting up, administering, and maintaining ESOPS.

- Attorney: Jim Vogl, Barna, Guzy And Steffen, Ltd.
- Admin: Deb Karlsrud, Newport Group
- Trustee: Mike Flesch, Alerus
- Appraiser: Pat Schmidt, Value Consulting Group
- Accountant: Mike Wieczorek, Redpath

**Moderator: Steve Storkan, Alerus**

**2:30 – 3:30      Communication – Struggling with How to Make an Impactful ESOP Committee?  
Terrace 3-4**

Does your ESOP Committee struggle with providing impactful proactive educational materials for fellow employee owners? This is a must-see communication focused session featuring survey results from over a dozen ESOP committees throughout the MN/Dakotas and Wisconsin ESOP Chapters. This session will not only feature examples of what successful ESOP committees do, but will also have a couple of case studies to showcase their results.

**Jason Wellman, ESOP Partners; Missy Pieske, Walman**

**3:30 – 5:00      Reception – complimentary refreshments – Terrace Ballroom Foyer**

Plan to stay and continue the conversation with your ESOP colleagues.

**Hotel Room Booking Link: <http://group.doubletree.com/esopassoc>**

**Single or Double rate: \$130    Cut off date: January 17, 2018**