

Building a Foundation for the Next Generation

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Emperor of Enlightenment

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Countess of Communication



Introduction

- ◉ Name
- ◉ Winery
- ◉ What brought you here today?

Foundation for Success

- ◉ Alignment
- ◉ Communication
- ◉ Education
- ◉ Delegation

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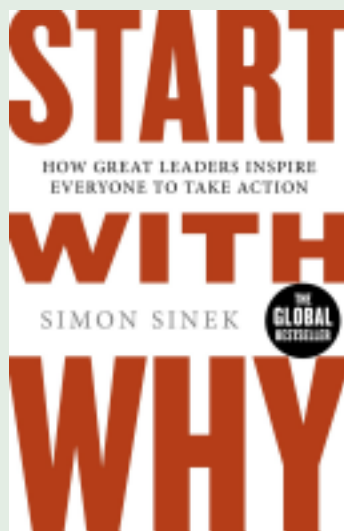
Alignment

- ◉ What is your vision?
- ◉ How is it shared?
- ◉ How is it reflected?
 - Actions
 - Focus
 - Reward systems

WHY?

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Resources

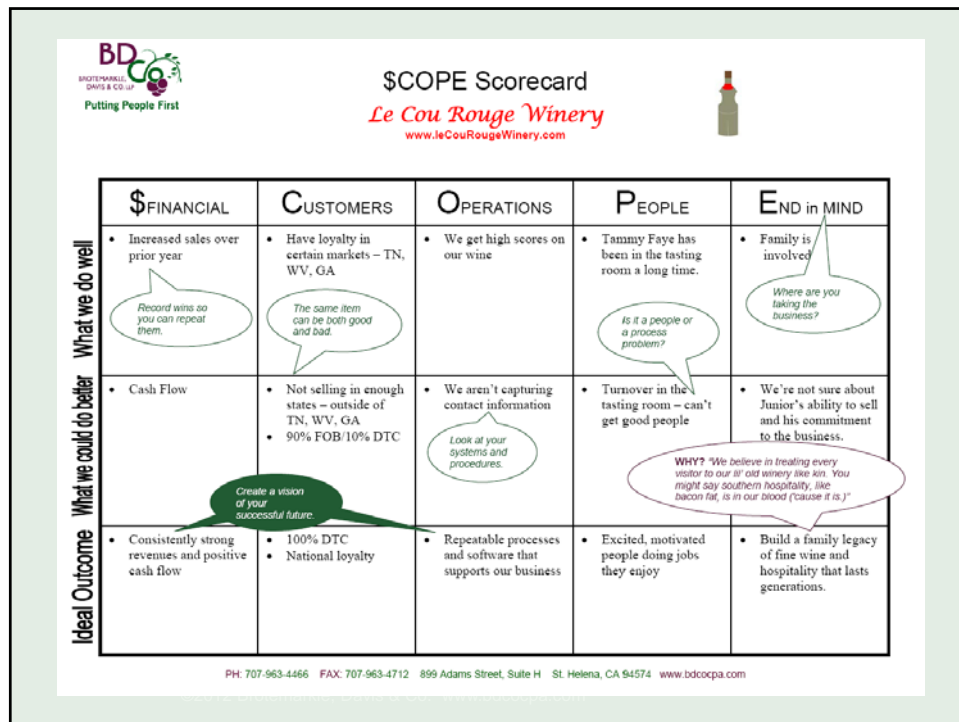


Simon Sinek video on TED.com

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Review 5 areas of the business

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Communication

- ◉ Behavioral styles
- ◉ Documentation

Understand different styles

People communicate differently.

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Science of Communication

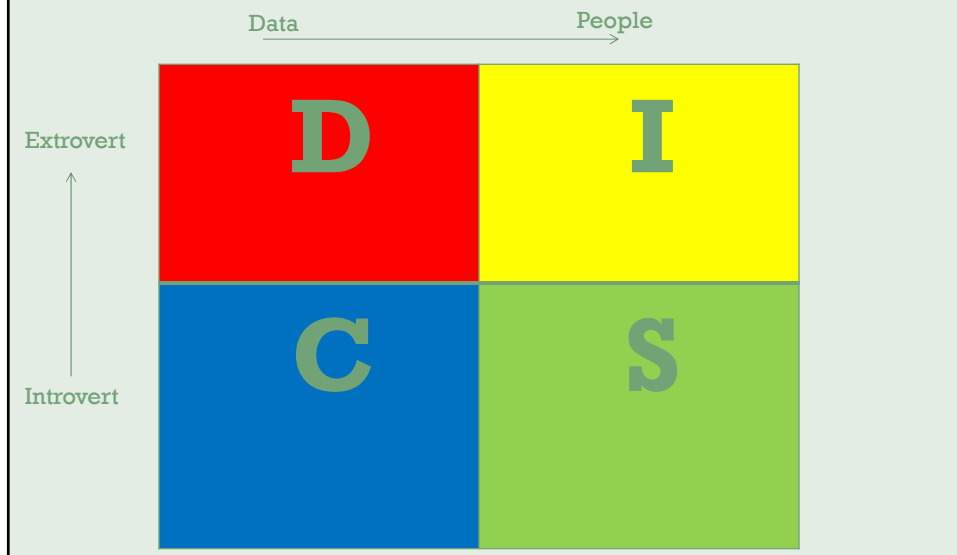
DISC

“Universal observable language of behavior”

The Universal Language DISC, Target Training International, LTD, 2004

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Recognizing styles



Behavioral styles

Dominance: Direct, decisive independent and to the point. Bottom line and results oriented. They are often strong-willed, enjoy challenges and immediate results.

Influence: Optimistic, social and out going. They enjoy being on teams, sharing openly, entertaining and motivating others.

Behavioral styles

Steadiness: Team players, cooperative and supportive of others. They prefer being in the background, working in a stable environment. They are often good listeners and prefer to avoid conflict and change.

Conscientiousness: Cautious and Concerned. They are focused on quality, details and accuracy.

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DISC

Observable behaviors

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High “D” Buy-in Characteristics

- ◉ 18% of U.S. population
- ◉ Buys New, products
- ◉ Typically, entrepreneur with many interests, doesn't like to waste time, has a fairly high ego, interested in new products and innovation.

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High “I” Buy-in Characteristics

- ◉ 28% of U.S. population
- ◉ Buys Showy products
- ◉ Typically, friendly people-oriented, glad to see you, and likes to try new innovative products.

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High “S” Buy-in Characteristics

- ◎ 40% of U.S. population
- ◎ Buys Traditional products
- ◎ May be shy but wants to be your friend, is slow to make changes, needs to trust salesperson, family oriented.

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High “C” Buy-in Characteristics

- ◎ 14% of U.S. population
- ◎ Buys proven products
- ◎ Typically, may be suspicious, does not make changes readily, not too talkative, and is not an innovator.

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Write it down

- ◉ One page business plan
- ◉ Forecast/Projection
- ◉ Cash Flow model

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The One Page Business Plan™	
	Focus Action Results
VISION	
MISSION	
OBJECTIVES	
STRATEGIES	
PLANS	

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Education

<http://www.slideshare.net/evenanerd/understanding-financial-statements>

- ◉ Financial Fluency classes for teams
- ◉ Communication for accountants

- ◉ WISE Academy “Demystifying Financials”

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What do you measure?

- ◉ Three main metrics for your winery
- ◉ Reports
 - Daily
 - Weekly
 - Monthly

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The Three Signs of a Miserable Job



JOB MISERY

Anonymity

Anonymity
 People cannot be fulfilled in their work if they are not known. All human beings need to be understood and appreciated for their unique qualities by someone in a position of authority. People who see themselves as invisible, generic or anonymous cannot love their jobs, no matter what they are doing.

Irrelevance
 Everyone needs to know that their job matters, to someone. Without seeing a connection between the work and the satisfaction of another person or group of people, an employee simply will not find lasting fulfillment. Even the most cynical employees need to know that their work matters to someone, even if it's just the boss.

Immeasurement
 Employees need to be able to gauge their progress and level of contribution for themselves. They cannot be fulfilled in their work if their success depends on the opinions or whims of another person, no matter how benevolent that person may be. Without tangible means of assessing success or failure, motivation eventually deteriorates as people see themselves as unable to control their own fate.

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Simple wisdom for organizations.

Unhappiness stems from

- ◉ Anonymity
- ◉ Irrelevance
- ◉ Immeasurement
 - Clear means of assessing progress are lacking
 - Measures are outside of your control
 - Measures don't tie directly to purpose

Budgeting process

- Great place to start
- Review the actuals
- Understand the relationship between actions and outcomes

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First just lay out the activities

MY SUCCESSFUL WINERY
Sample CALENDAR FOR PERFORMANCE MANAGEMENT STRATEGIES

Enter planned activities for the year. Monthly, color code the cells to indicate completion.

Description	Responsible	Completed	2014											
			Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Distributor phone calls	Sales & Marketing Team													
Make 1 per day to prospects, 1 per day to current customers	Sam		X	X	X	X	X	X	X	X	X	X	X	X
Events														
Winemaker dinner	Bill				X				X				X	
Winery visits for VIP distributors - Premier Napa Valley	Sally													
Napa Valley pours for Limo drivers														

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Safe environment



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**“Trust always affects two
outcomes:
speed and cost.”**

*--The Speed of Trust by Stephen
Covey*

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Are you imposing an
“inheritance tax” on the next
generation?

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“...you may have paid an ‘inheritance tax’ when you’ve stepped into a role that was occupied by someone who created distrust before you.”

--The Speed of Trust by Stephen Covey

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Action plan

- ◉ Understand behavioral style
- ◉ Educate
- ◉ Share information
- ◉ Provide budget responsibility
- ◉ Expose to all areas of the business

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Case study

Le Cou Rouge

What should we do about Junior?

- ◉ Alignment
- ◉ Communication
- ◉ Education
- ◉ Delegation

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What stood out for you?

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Resources

- <http://blogs.hbr.org/2013/04/why-you-should-take-the-blame/>
- www.ted.com
- http://www.tablegroup.com/imo/media/doc/Three_Signs_Model.pdf

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