



2019 FISA ANNUAL CONFERENCE

LIVING ON THE EDGE OF DISRUPTION

SEPTEMBER 14-17, 2019
GRAND GENEVA RESORT & SPA
LAKE GENEVA, WI



EDUCATION › NETWORKING › LEARNING

FISA 2019 ANNUAL CONFERENCE

WELCOME



It is with pleasure my wife, Tara, and I invite you to join us at the 2019 FISA Annual Conference in wonderful Lake Geneva, Wisconsin. This year's event will be held at the historic four diamond Grand Geneva Resort and Spa. The "Grand Resort of the Midwest" sits just minutes away from the town of Lake Geneva, a variety of restaurants, recreational activities and many Wisconsin treats!

With today's constant changing business culture, it is imperative to stay up to date with current trends in business, leadership and the economy. Our conference theme will be "Living on the Edge of Disruption." A carefully selected slate of speakers will tell us the art of negotiating; how to understand why the consumer is in charge; the top military secrets for effective leadership; and how the ever ambiguous and complex laws that govern our daily businesses can be navigated with guiding principles. You might even learn about a tax advantage that can save your company money! In addition to learning, you will have the opportunity to meet with industry leaders through fun activities including golf, boat tours of the iconic shores, and networking cocktail receptions.

Please consider bringing your spouse or guest to this year's FISA conference to meet our members and enjoy Lake Geneva. I also encourage you to reach out to others who have not attended the conference and invite them to experience all the great things that FISA and the conference can provide.

With all that FISA offers, from speakers to networking, this conference promises to be a great one. Come learn how to make your business better and experience the true wonders of this great industry we love. Tara and I look forward to seeing you in beautiful Lake Geneva this fall!

Gray E. Sherrill

Gray E. Sherrill, M.G. Newell Corporation
2019 Conference Chairman

REGISTRATION INCLUDES

- All Meeting Materials
- Three Breakfasts & Receptions
- Monday Evening Cocktails/Dinner
- Two Guest Breakfasts

THINGS TO KNOW

Throughout the Conference, dress in comfortable resort attire. Collared shirts for the men and slacks, bermudas, or skirts for the ladies would be appropriate. Monday night's dinner at the Resort will include a casino night. No dressy cocktail attire needed so come in comfortable resort attire for a fun night of gambling and socializing. Average temperatures in September range from 75 degrees in the day to 53 degrees in the evenings. Weather permitting, Friday and Saturday cocktail receptions are outdoors so wear comfortable shoes.

TRANSPORTATION

Grand Geneva Resort & Spa is located in southeast Wisconsin, just a few minutes north of the Illinois border. The Resort is less than an hour drive (55 miles) from Milwaukee and 90 minutes from Chicago (80 miles) and Madison (80 miles). If flying into Milwaukee or Chicago, you can schedule a shuttle service to Grand Geneva from the airports through Go Riteway. They have an easy online booking system for Grand Geneva guests.



FRIDAY, SEPTEMBER 13

- 4:00 pm – 5:00 pm Conference Committee
- 5:00 pm – 6:30 pm Board of Directors Meeting

SATURDAY, SEPTEMBER 14

- 7:30 am – 8:30 am Boot Camp
- 8:00 am – 2:00 pm FISA Golf Tournament
- 9:30 am – 2:30 pm Mailboat Cruise Around Geneva Lake
- 5:00 pm – 6:00 pm First-Timer's Meeting
- 6:00 pm – 7:30 pm Cocktail Reception/Dinner on your own

SUNDAY, SEPTEMBER 15

- 7:15 am – 8:15 am Breakfast & Program (Everyone Invited)
- 7:30 am – 8:00 am **Tax Credits for FISA Members** – Neil Shah
- 8:30 am – 10:00 am **Rules vs Principles** – Andy Fastow
- 10:30 am – 12:00 pm **Negotiating Skills** – Michael Schatzki
- 10:30 am – 11:30 am A Grand Tale
- 12:30 pm – 4:30 pm Sporting Clays
- 12:30 pm – 4:00 pm Zip Lining Canopy Tour
- 12:30 pm – 3:30 pm Bicycling
- 2:00 pm – 4:00 pm Sundae Boat Tour
- 6:00 pm – 7:30 pm Cocktail Reception/Dinner on your own

MONDAY, SEPTEMBER 16

- 7:15 am – 8:15 am Breakfast & Program (Delegates)
- 7:30 am – 8:30 am Boot Camp
- 7:30 am – 8:00 am **The Consumer Is in Charge** – Dave Donnan
- 8:30 am – 10:00 am **Finding the Dark Cloud Behind the Silver Lining: Five Things to Worry About This Year** – Dr. Chris Kuehl
- 9:30 am – 11:00 am Black Point Home Tour
- 10:30 am – 12:00 pm **Top Seven Military Secrets for Effectively Leading Change** – Commander Mary Kelly
- 12:30 pm – 4:30 pm Sailing Regatta
- 12:30 pm – 4:00 pm Shore Path Walking Tour
- 12:30 pm – 4:00 pm Zip Lining Canopy Tour
- 2:00 pm – 4:00 pm Pickleball
- 6:30 pm – 10:00 pm Cocktails/Dinner/Casino Night

TUESDAY, SEPTEMBER 17

- 7:30 am – 8:30 am Breakfast & FISA Annual Meeting/Everyone Invited
- 8:45 am – 9:30 am Board of Directors Meeting

LAKE GENEVA, WI

Lake Geneva is a resort town on Geneva Lake in southeastern Wisconsin. The lakeside Shore Path is dotted with Gilded Age mansions. Many estates date to the 1870s and were built as summer homes for the titans of industry in Chicago. The town of Lake Geneva can be explored on foot and is home to shops and restaurants.

Geneva Lake was formed about 20,000 years ago as the last glacier traveled across North America. It is the second deepest spring fed lake in Wisconsin with approximately 22 miles of shoreline.

ABOUT THE RESORT

The Grand Geneva Resort & Spa opened in 1968 as the Lake Geneva Playboy Club Hotel and was the first Playboy Club Hotel to open in the United States. The Frank Lloyd Wright inspired design was innovative. Today, this AAA Four Diamond Resort has 609 rooms, two golf courses, numerous on-site amenities and a luxurious WELL Spa + Salon. Several on-site dining options are available including two of Lake Geneva's most popular restaurants: Geneva ChopHouse and Ristorante Brissago.

SEPTEMBER 14–17 • LIVING ON THE EDGE OF DISRUPTION

Tax Credits for FISA Members

Many business owners in nearly every industry are unaware that federal and state research and development (R&D) tax credit programs exist that may reward their day-to-day efforts aimed at producing an improved product. The Research and Development Tax Credit is a government-sponsored benefit that provides cash incentives for companies conducting R&D activities in the U.S. These economic incentives were implemented to stimulate research and development in industries of all sizes, to encourage retention of technical talent, and to transform the economic landscape.



NEIL SHAH is a Technical Director at alliantgroup, specializing in the manufacturing, engineering and distribution industries. An engineer by trade, Neil has worked with hundreds of small to mid-sized businesses and has helped them claim over \$250 million in credits and incentives. Several FISA members are currently working with alliantgroup and taking advantage of R&D tax credits available to them.

Rules vs Principles

Ethics is understanding the difference between what is right to do and what you have the right to do. Andy Fastow will make observations about how the ambiguity and complexity of laws and regulations breeds opportunity for problematic decisions and discuss how to ensure that companies not only follow the rules, but uphold the principles behind them. In addition, he will discuss the ways in which technology can be deployed to illuminate such problematic situations.



ANDY FASTOW was the Chief Financial Officer of Enron Corp. from 1998 – 2001. The story of Enron Corp. is the story of a company that reached dramatic heights, only to face a dizzying fall. In 2004, Fastow plead guilty to two counts of securities fraud, and was sentenced to six years in federal prison. He completed his sentence in 2011 and now lives with his family in Houston, TX.

Negotiating Skills

Negotiations happen quickly. You have to think on your feet. The key is learning how to see behind the smoke and mirrors and focus on what the other party really can and will do. This program will show you how to set their expectations, uncover the information that you need and develop the negotiating scenarios and strategies that will significantly improve your profitability. The program will be customized for FISA and you will leave with tools and strategies to use right away to improve your negotiating outcomes.



MICHAEL SCHATZKI, Principal of Negotiation Dynamics®, has designed and delivered negotiation seminars for businesses and organizations in the United States and around the world for more than twenty-five years. As a practicing negotiator, he regularly consults with clients, helping them succeed with their most challenging negotiations. He is the author of several books and an audio/video program on negotiation.

The Consumer Is in Charge

The decline of legacy brands, the emergence of smaller niche companies and store brands, and changing consumer tastes in beverages are just a few of the trends directly affecting FISA's customers. Whether you are a manufacturer or a distributor, understanding where the market is going and the various factors influencing the consumer are trends that directly affect your business.



DAVE DONNAN is a partner emeritus with A.T. Kearney in the Consumer Products & Retail Practice in which he led the global food and beverage sector. During his career, Dave managed operating companies, ran food plants and consulted to leading global retail and consumer product companies in technology and supply chain strategies, brand growth and market positioning.

Finding the Dark Cloud Behind the Silver Lining – Five Things to Worry About This Year

Thus far this year, there have been both encouraging and discouraging signs as the economy copes with some shocks to the system and motivators from past years fade a little. New concerns are emerging - inflation, trade wars, market volatility. These concerns combine with concerns that have been worrying for years - labor shortages, productivity concerns, global competitiveness. Where are we at mid-year and what does the next half look like? Will the trends of 2019 extend into 2020?



DR. CHRIS KUEHL is a Managing Director of Armada Corporate Intelligence. He provides forecasts and strategic guidance for a wide variety of corporate clients around the world and is the chief economist for several national and international organizations as well as the economic analyst for several state accounting societies.

Top Seven Military Secrets for Effectively Leading Change

Why do some people love change while others struggle? Can leaders lead change, even if they don't like it? Yes! That is the leader's job! Lost revenue, product delays, low employee morale, and slow productivity are all signs that your people are struggling with change. In this high-energy, high-content, and entertaining session, Commander Mary Kelly shows leaders how military leadership instills confidence, creates trust, engenders loyalty, and creates teams that survive and thrive during times of rapid change.



COMMANDER MARY KELLY is a graduate of the United States Naval Academy and spent over 20 years on active duty in intelligence and logistics. She is an internationally-known economist and leadership expert specializing in the fields of leadership, productivity, communication and business profit growth. An energetic, engaging, and perceptive leadership author and speaker, Commander Kelly delivers humorous, inspiring, and insightful keynote speeches, offering tools and insights that increase productivity, morale, and profits.

2019 FISA CONFERENCE ACTIVITIES

PLEASE NOTE: The number in parentheses after an activity is the maximum capacity for that activity.

SATURDAY, SEPTEMBER 14TH

FISA GOLF TOURNAMENT (60)

8am • \$155 • Includes green fees, cart, cook-out tax & gratuity.



Grand Geneva's course, the Brute, at over 7,000 yards, is one of the most challenging layouts in the Midwest and is considered one of Wisconsin's best golf courses. Enhanced with 68 bunkers and huge rolling greens, averaging over 8,000 square feet,

this par-72 Lake Geneva golf course is perfectly manicured and immaculately maintained. Enjoy this Captain's Choice FISA tournament followed by a cook-out.

MAILBOAT CRUISE AROUND GENEVA LAKE (55)

9:30am-2:30pm • \$75 • Includes transportation, boat cruise, lunch, tax & gratuity.



Relax and enjoy the scenic beauty, with a fully narrated tour as you cruise completely around lovely Geneva Lake. There are only handful of places left in the country where mail is still delivered by boat and none with a more exciting and scenic tour than this! At the conclusion of the 2½ hour cruise, walk across the street for a de-

licious lunch at Popeye's, one of Lake Geneva's most popular restaurants. Coffee and sodas may be purchased on the boat and restrooms are available.

SUNDAY, SEPTEMBER 15TH:

SPORTING CLAYS (33)

12:30pm-4:30pm • \$145 • Includes transportation, lunch, 100 targets and ammunition, firearm rental, tax and gratuity.

Located only 20 miles from the Grand Geneva Resort, McMiller Sports Center is home to a beautiful sporting clay course which is spread throughout the Kettle Moraine Forrest. The course has 12 walkable stations with each station having two remote control clay throwing machines. The course's throwers will launch clays from various locations in different directions. While sporting clays is a little more challenging, the course is specifically designed to be fun and enjoyable for even the newest clay shooters and is great fun for large groups.

ZIP LINING CANOPY TOUR (25)

12:30pm-4pm • \$140 • Includes transportation, box lunch, zip lining, tax & gratuity.



Enjoy your box lunch and then experience the beauty of Lake Geneva through a thrilling zip line canopy tour of the forest with a professionally trained guide. This fun and beautiful aerial adventure includes nine unique zip lines giving you a birds-eye view of Lake Como; five sky bridges take you from tree to tree; three spiral staircases help you reach your launch points and the 1,200-

foot racing zip line lets you race a friend.

BICYCLING (25)

12:30pm-3:30pm • \$65 • Includes transportation, bike rental, guide, box lunch, tax & gratuity

Just five minutes from the Resort, you will start your afternoon at the Pedal & Cup, a picturesque place to enjoy a box lunch. After lunch, cycle to the nearby White River State trail (a crushed limestone trail) that follows a former rail corridor. A guide will lead you on the scenic ride at your own pace. The trail is fairly level and the ride would be comfortable for anyone accustomed to cycling at a moderate pace.

SUNDAE BOAT TOUR (33)



2pm-4pm • \$45 • Includes transportation, boat cruise, tax & gratuity.

Savor an ice cream sundae while you sit back and enjoy a narrated cruise of a portion of Geneva Lake. Learn the history of the beautiful homes you'll pass, many of which were built at the turn of the 19th century, when Lake Geneva flourished as a playground for wealthy Chicago residents escaping the heat of the city.

MONDAY, SEPTEMBER 16TH

BLACK POINT HOME TOUR (26)

9:30am-11am • \$45 • Includes transportation, admission to house and guided tour, tax & gratuity.



Explore the elegant trappings of this magnificent Queen Anne summer estate built by Chicago beer baron Conrad Seipp in 1888 as a family getaway from the heat and bustle of the city. You'll tour the first two floors of the house and learn about the original furnishings enjoyed by several generations of the family. The house is located on a bluff above Geneva Lake and has lovely landscaped gardens.

SHORE PATH WALKING TOUR (25)

12:30pm-4pm • \$45 • Includes transportation, box lunch, tax & gratuity.

The Shore Path around Geneva Lake features quaint cottages nestled between historic estates with beautiful gardens and stately mansions. Get an up-close view as guide and FISA member, Ruth Anne Morava, leads you on a narrated 3½ mile hike along the prestigious North Shore. Walk across the lawns of the Wrigleys, the Rockefellers, and the Swifts while getting the inside-scoop from a local resident. The terrain varies from cement, bricks, grass, stepping stones and gravel, some of which are hilly and narrow. Moderate intensity.

SAILING REGATTA (16)

12:30pm-4:30 pm • \$130 • Includes transportation, lunch at Lake Geneva Yacht Club, boat rental, regatta management, tax and gratuity.



Our host for lunch is the lovely Lake Geneva Yacht Club and a fun afternoon of sailing is being organized by Marek Valasek, a former Olympian, and Executive Director of the Geneva Lake Sailing School. We'll enjoy a little competition racing four 23' Sonar sailboats on

Geneva Lake. Each boat can take four people. Skippers must be experienced sailors but non-sailors are welcome to sign up for this regatta. If we have additional participants interested, we can alternate being crew and being a spectator.

ZIP LINING CANOPY TOUR (25)

12:30pm-4pm • \$140 • Includes transportation, box lunch, zip lining, tax & gratuity.

Enjoy your box lunch and then experience the beauty of Lake Geneva through a thrilling zip line canopy tour of the forest with a professionally trained guide. This fun and beautiful aerial adventure includes nine unique zip lines giving you a birds-eye view of Lake Como; five sky bridges take you from tree to tree; three spiral staircases help you reach your launch points and the 1,200-foot racing zip line lets you race a friend.

PICKLEBALL (24)

2pm-4pm • \$25 • Includes instructor, beverages, tax & gratuity. Wear tennis shoes.

Who knew a sport with such a funny name could become a national sensation? First created in 1965 on Bainbridge Island, pickleball, a sport for everyone, currently is exploding in popularity. Played on a court smaller than a tennis court and with paddles larger than ping pong paddles, pickleball can be played by teams of two. If you've never played, now's your chance to learn the basics and enjoy the social aspects of the game. We'll have instruction, court-side beverages, and a tournament to select the first FISA pickleball winners!