

Executive Education Program Modules
12 May to 9 June
Led by UConn Faculty and Industry Professionals

Date	Time	Session	Topic	Instructor(s)	Cost
May 12	9 am to noon	Session #3	Leadership & Management	Professor Lucy Gilson, UConn Management Capri Frank, President, Miller Foods	\$200
May 12	1 to 4 p.m.	Session #4	Operations & Customer Service	Assoc. Professor Jose Cruz, UConn School of Business Robin Bienemann, Entrepreneur in Residence, UConn Family Business	\$200
May 19	9 am to noon	Session #5	Family Dynamics	Assoc. Professor Kari Adamsons, UConn Family Studies Dept. Capri Frank, President, Miller Foods	\$200
May 19	1 to 4 p.m.	Session #6	Creativity & Innovation	Professor Lucy Gilson, UConn Management	\$200
June 2	9 am to noon	Session #7	Talent Management	Assist. Professor Kevin Thompson, UConn School of Business Capri Frank, President, Miller Foods	\$200
June 2	1 to 4 p.m.	Session #8	Finances	Assist. Professor Paul Gilson, UConn School of Business	\$200
June 9	9 am to noon	Session #1	Revenue Generation: Sales & Marketing	Kim Pita, Brand & Marketing Consultant	\$200
June 9	1 to 4 p.m.	Session #2	Legal & Compliance	Bob Zelinger, Esq, Partner, Hinckley Allen	\$200
All Dates	Certificates are awarded to the family or individual that completes 6 of the 8		All 8 modules can be purchased as a series	Full 8 sessions: \$1,450 for a family or individual Additional family members per module: \$100 for the 1 st & \$50 for additional Individual sessions: \$200 each	\$1,450

May 12, 9 a.m. to 12 p.m.
Leadership & Management

Focus Areas: Senior Management, Strategic Planning

Session #3: Leadership

Good management and leadership are critical to business success. In this session, you will learn the difference between management and leadership, and how to strategically plan for the evolution of your human capital. Professor Gilson will highlight the intersection of leadership, situations and followers. She will show you a clear pathway for being the best leader in a small or family business.

Lucy Gilson (Ph.D. Georgia Institute of Technology) is a professor and head of the University of Connecticut Management Department. Her research examines teams in different organizational settings performing a diverse range of jobs to understand how creativity, empowerment, leadership, and virtual communication influence effectiveness.

She is the Senior Associate Editor of Group and Organization Management, and her work has been published in the Academy of Management Journal, Journal of Management, Leadership Quarterly, and other top international journals.

Professor Gilson has consulted with multinational companies, as well as state and national agencies in the areas of leadership, women and leadership, managing virtual teams, managing change, and leading for creativity.

Capri Frank spent her formative years growing up on the family farm and working in the family business, Miller Foods, Inc. of Avon. After attending Northeastern University, Capri returned home to work in the family business and assist in the family special education transportation company, Miller Transportation. After working many years in the family business, Capri ventured out to gain valuable experience in large corporations.

She continued volunteering in various non-profit agencies in the Hartford area including the American Red Cross, St. Agnes Home and the Sexual Assault Crisis Center. She attended UConn completing her degree in Corporate and Organizational Studies. Upon completion of her degree, she served as chair of her UConn Alumni Association. While working toward her master's degree at UConn in Human Resource Management and raising her family, she returned to the family business in project management leading a successful e-commerce expansion and reorganization.

Capri recently founded IRPAC Enterprises, a brokerage and consulting business, and continues to actively work expanding her family business. Most recently, she co-founded the Family Business Base Camp, where she can share her passion, experience and stories of family business. Currently, she serves on CBIA's Small Business Advisory Council, as Read to a Child Board member and is an active member of the Avon-Canton Rotary Club. Capri recently took over as president of Miller Foods, Inc. and serves on the company's board of directors.

\$200 per session, or \$1,450 for series of 8

May 12, 1 to 4 p.m.

Operations & Customer Service

Focus Areas: Product/Service Delivery, Technology, Customer Satisfaction

Session #4: Operations & Customer Satisfaction

Operations are the foundational elements that keep your business functioning efficiently. In this session you will discover how to outline your operational goals and objectives, then develop an action plan to make them achievable, scalable, sustainable and measurable. Dr. Cruz and Robin Bienemann will highlight the tools you will need to ensure you are meeting and even exceeding expectations. You will see how measuring customer satisfaction can have a powerful return on investment.

Dr. Jose Cruz is an Associate Professor of Operations and Information Management and Academic Director for the school's Graduate Program in Business Analytics and Project Management. Dr. Cruz's teaching interests are in Operations Management, Operations Research, Business Analytics, and Project Management. His research is multidisciplinary and combines his background and interests in management, engineering, computer systems, and applied mathematics. His general area is complex decision-making on network systems with a specific focus on global issues.

He is especially interested in supply chain management, corporate social responsibility, sustainability, relationships and risk management. Dr. Cruz has published his research in European Journal of Operational Research, Naval Research Logistics, Decision Support Systems, International Journal of Production Research, International Journal of Production Economics, Environment & Planning B, Journal of Cleaner Production, Mathematical and Computer Modeling, Computational Management Science, and Quantitative Finance. He has received the School of Business Ackerman Scholarship Award (two times), Outstanding Graduate Teaching Award, Outstanding Undergraduate Teaching Award, and Distinguished Service Award.

As an Entrepreneur in Residence, Robin Ann Bienemann has been the driving force behind the University of Connecticut's new Family Business Program. Working closely with the Dean of the University's business school, Bienemann has led the research effort to identify critical needs in the state's family business ecosystem. As part of the effort, she rapidly developed a network of the state's business owners, engaging them in a series of research activities. In addition to spearheading the research effort, she is now guiding the overall design of the program.

In addition to her role as Entrepreneur in Residence at UConn's Schools of Business and Engineering, Bienemann is CEO and founder of Crimson Rook, LLC. The firm specializes in helping small and mid-size companies increase value, transition to new owners or generations, and address underlying business challenges. The University of Connecticut's Schools of Business and Engineering tapped Bienemann to be their first Entrepreneur in Residence. Bienemann is leading an effort to strengthen ties between the university and the business sector.

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May 19, 9 a.m. to 12 p.m.

Family Dynamics

Focus Areas: Transitions, Communication, Values, Strategies

Session #5: Running and working in a family business has its ups and downs. In this session, you will hear perspectives from several family business leaders who have set up systems and strategies to encourage respectful and productive work environments. Kari Adamsons and Capri Frank will review family business structure, family participation and how to align vision and values. They will discuss transition planning and communications for all generations within an organization. They will take a deep dive into how to overcome challenges family businesses face.

***Kari Adamsons** is an Associate Professor in the Department of Human Development and Family Studies at the University of Connecticut. Her research focuses on fathering, parenting, couple relationships, and the ways people negotiate these different roles. She is the director of the HDFS undergraduate honors program and Associate Department Head for Undergraduate Studies, and teaches courses on close relationships, parenting, and men and masculinity.*

***Capri Frank** spent her formative years growing up on the family farm and working in the family business, Miller Foods, Inc. of Avon. After attending Northeastern University, Capri returned home to work in the family business and assist in the family special education transportation company, Miller Transportation. After working many years in the family business, Capri ventured out to gain valuable experience in large corporations.*

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May 19, 1 to 4 p.m.
Creativity & Innovation
Focus Areas: Entrepreneurship, Creativity

Session #6: Creativity & Innovation

Are you leveraging the creativity of your team to its fullest? How much time do you spend on innovation? Companies who invest time and energy into creativity and innovation will naturally be ahead of the curve. In this interactive session, Professor Gilson will take you through exercises to stimulate the brain and generate new ideas. She will provide insight on how management directly affects creativity within a workplace.

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June 2, 9 a.m. to 12 p.m.

Talent Management

Focus Areas: HR, Recruiting, Retention, Compensation, Generations

Session #7: Talent Management

Hiring, onboarding, training and managing your team effectively is paramount in developing a strong business culture. In this session, Assistant Professor Kevin Thompson and Capri Frank will review The Employee Life Cycle, taking a deep dive into best practices in employee retention and assessment. They will demonstrate the importance of investing time and energy into human resources, a critical strategic function, in companies of all sizes.

Kevin Thompson is an assistant professor in residence in the University of Connecticut School of Business Department of Management. He teaches human capital courses in the Executive MBA and Human Resources Management graduate programs and the strategy capstone course for undergraduate business students. Kevin advises honors students on experiential honors projects and is a service learning fellow leading experiential, service learning projects for the School of Business.

Kevin is a member of the Academy of Human Resource Development, where he has presented on developing millennial employees and contributes to the adult learning scholar-practitioner and learning and development special interest groups. His research interests include learning and development supports for the millennial generation, leading millennials and qualitative inquiry.

Kevin serves on the Board of Directors for the Connecticut Community for Addiction Recovery and consults on the organization's training programs. He is a graduate of the University of Connecticut and Rensselaer Polytechnic Institute. He has worked as a business leader in entrepreneurial settings, learning leader in Fortune 100 companies, and leadership and learning consultant for non-profit organizations.

Marc Kroll the Managing Principal of COMP360. He is a seasoned compensation consultant in the design, formulation and implementation of total reward strategies and variable pay plans across five industries, including service and manufacturing environments.

He has advised and collaborated with executive management and employee teams to drive consensus on a variety of pay for performance challenges. These have ranged from compensation strategy formulation to full-scale implementation of business-based reward programs, inclusive of executive, management and sales compensation.

Experienced in both profit and non-profit sectors, Mr. Kroll brings a broad perspective and in-depth knowledge to clients as they determine their compensation vision and tactics. His approach is both focused and participative, integrating his clients' business challenges with their organization's culture, markets and compensation strategy.

An Adjunct Professor at the Dolan Business School (Fairfield University), he has taught performance management and compensation. In addition, he has conducted professional development seminars for the Society of Human Resource Management (SHRM) in compensation strategy and management. He received his B.A. from the City College of the City of New York and his M.A. is from Brown University.

\$200 per session, or \$1,450 for series of 8

June 2, 1 to 4 p.m.
Finances & Capital

Focus Areas: Accounting, Taxes, Valuation, Capital

Session #8: Finances & Capital

Keeping on top of your business finances provides a strategic snapshot of what is working and what is not. In this session, Paul Gilson will provide insight into how to plan and forecast for all stages of a business. You will discover how important flexibility is when seeking capital for growth opportunities. He will discuss how to properly value your family business for use during transition planning. This is a session that will give you baseline knowledge of critical financial documents that you will need to understand to make educated decisions.

Paul Gilson, assistant professor in residence in finance, returns to UConn after serving as a faculty member in the Department of Business Administration at Eastern Connecticut State University, where he taught entrepreneurship. Gilson had previously taught at UConn from 2000 to 2010. Gilson's current responsibilities include managing student competitions, mentoring an undergraduate team in the finance department's student managed fund and overseeing the undergraduate finance program in Storrs. Current teach areas include financial services, entrepreneurial finance, global financial management and mergers and acquisitions.

He has worked for many different companies from large multi-national businesses to small high-tech startups. He began his career as an accountant with KPMG Peat Marwick in both Atlanta and London. Later, Gilson became the CFO and EVP of strategic development of the Maxim Group in Atlanta, specializing in IPOs and mergers and acquisitions.

More recently, Gilson has helped numerous startups prepare business plans and fundraising activities. Gilson earned his Ph.D. from Georgia Tech. His research interests include the application of game theoretic models to the relationship between entrepreneurs and the institutions that finance startups. He has also co-authored book chapters on teams, creativity and entrepreneurship.

\$200 per session, or \$1,450 for series of 8

June 9 • 9 a.m. to 12 p.m.

Revenue Generation: Sales & Marketing

Focus Areas: Branding, Sales, Marketing, Social Media, Generations

Session #1: Revenue Generation: Branding, Marketing & Sales

In this session, you will learn the ingredients to building an effective and purposeful marketing plan leveraging low cost or no cost options to grow marketing share and revenue. Kim Pita will highlight the importance of developing, maintaining and communicating a morale-boosting culture. She will take a deep dive into communicating across five generations, both internally and externally, using social media and digital marketing. This is a must attend session for those eager to take their marketing from uncertainty to harmony.

Kim Pita began her career writing speeches and correspondence for accomplished business and political leaders, including U.S. Congresswoman Barbara B. Kennelly. Today, she delivers inspirational messages through her consultancy, Pita Peaces. Kim is a motivational speaker and marketing/brand consultant helping non-profits and family-owned businesses in transition get from chaos and uncertainty to peace, harmony and prominence. In 1996, Kim co-founded with her then-husband and grew The Pita Group to a multi-million dollar marketing agency in Rocky Hill before she departed in 2013.

Kim serves as chair of Connecticut Business & Industry Association's Small Business Advisory Council and chair of Mental Health Connecticut Board of Directors. She has served on many Boards of Directors, including CBIA, Girl Scouts of Connecticut, Hartford Children's Theatre, Rocky Hill Chamber of Commerce and Rebuilding Together Hartford.

Kim received the 40 Under 40 Award from the Hartford Business Journal, an Alumni Achievement Award from Framingham State University and a Women Redefining Media Leadership Badge from Girl Scouts of Connecticut. She helped conceive and launch the Family Business Base Camp to give future family business leaders the knowledge and wisdom necessary to thrive and survive in chaos!

\$200 per session, or \$1,450 for series of 8

**June 9 • 1 to 4 p.m.
Legal & Compliance**

Focus Areas: Business Set Up, Compliance, Governance, Contracts

Session #2: Legal & Compliance

In this session you will learn the ins and outs of legal issues you may experience as a small/family business owner or manager. Bob will talk about how to determine the right business structure and set up. He will take a deep dive into ownership and governance, outlining who does what and why within your organization. He will provide insight into transition planning among family members. He will highlight contracts with employees, vendors and customers, as well as good record keeping both personally and professionally. This interactive session will give you the guidance you need to on aspects relative to business laws

Bob Zelinger is a business lawyer who provides legal services to middle market, privately held enterprises, including start-up business organizations and emerging growth companies. A partner with Hinckley Allen, he advises clients on determining legal forms of operation, obtaining and documenting financial arrangements, compliance with regulations, and the negotiation and preparation of documentation for a variety of commercial transactions. Bob often serves as outside general counsel to his clients in a variety of industries.

On behalf of clients, he has formed, acquired, sold and dissolved business organizations; structured private stock offerings and financial arrangements; developed tailored terms for contracts; negotiated and documented joint ventures, and handled a variety of commercial transactions and general business matters.

Bob provides clients with a sound and practical approach to legal issues developed over nearly 30 years of practice. He serves on the Board of Directors of Hartford Stage Company and Waterbury Development Corporation, Inc., as well as the advisory committee of the SBA Small Business Development Center.

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