



# MAKE IT HAPPEN IN 2017-2018

*A complimentary business resource  
guide for companies*

*Career Options appreciates the participation from the following businesses:*

Strategic Solutions Consulting, LLC

Marco Technologies, LLC

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Strategies, LTD

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# STRATEGIC SOLUTIONS CONSULTING, LLC

*With over 25 years of experience in working with issues involving people, the Seefeldts have developed a very unique blend of expertise in providing services involving management consulting and business psychology to privately held and family owned businesses. What most businesses don't realize is that the answer to their problems often lies in bringing in a neutral and objective "third party" who has expertise in working with changes in leadership, strategic planning, conflict and succession planning. Strategic Solutions Consulting is committed to helping you succeed personally, as a business, and as a family. They work with you to identify the best solutions to your problems, give you tools and techniques to be successful, and they support you through the difficult parts of the process.*

## What are six key reasons that companies have a lack of business growth and/or profitability?

- 1. Vision** - We see a lot of businesses that either have no vision, an unclear vision, or different visions (among key leaders) for the future of the business. If there is any lack of clarity about where a business is headed and what the future looks like, it can be very detrimental to the success of that business.
- 2. Trust** - Trust, or lack thereof, is extremely common in businesses that are underperforming. Trust is the foundation upon which great businesses are built. When trust is low (or in some cases nonexistent) on a team or in an organization, that business will not be able to function at an optimal level.
- 3. Communication** - Open communication is another big issue hindering companies from being successful. When things are not openly discussed, all sorts of problems can result. People may have hidden agendas or misconceptions of what is going on, and the more things that aren't communicated, the more unresolved and often underlying conflict builds.
- 4. Goals** - By either not setting goals, setting goals that are unattainable, or setting too many goals, a business can run into trouble. Determining key goals that the entire team is on board with, along with action items to reach those goals is an essential part of a successful business.
- 5. Decision Making** - Often, there is no established decision making process, or one person makes all of the decisions while everyone else waits around without acting until a decision is made. This can cause a business to suffer greatly, especially when lack of decision making leads to inaction, and things just don't get addressed or accomplished in a timely manner.
- 6. Alignment** - When key leaders in the business are not aligned as far as where the business is headed, which goals are important, etc., the overall success of the business will suffer.

## What are some of the main areas that family business have unresolved conflict?

- 1. Resistance to change** - Especially in family businesses, we see a lot of resistance to change. A lot of times, the owner or leader has been successful because of the way they have always done things, but fail to make necessary changes to stay competitive long-term.
- 2. Generational differences** - There are many generational differences that can cause conflict in a family business, such as: technology, management style, working style, values, preferred method(s) of communication), etc.
- 3. Failure to discuss difficult things** - Not having uncomfortable but necessary conversations can result in unresolved conflict. Families want to maintain harmony, and as a result, often avoid talking about things that need to be discussed. This impacts the business, as things cannot be planned for appropriately, and there can be also be a lack of accountability and other problems.
- 4. Unclear expectations** - In family businesses, roles may not be clearly defined, and therefore, people may not know what is expected of them. Making clear roles and responsibilities for each individual can greatly reduce conflict caused by unclear expectations.

# STRATEGIC SOLUTIONS CONSULTING, LLC

**5. Unrealistic expectations** - There are often unrealistic expectations in family businesses, especially between generations, which leads to conflict. The owner/founder of the business usually has incredible work ethic and has worked around the clock to establish a successful business. In many cases, the business has seen significant growth, and therefore needs to be a more team-based leadership style for the next generation to handle a more complex business.

## **What are 4-6 tips to help a company during a transition in key management?**

1. Document key information from the incumbent, finding out exactly what they do.
2. Look at what the company needs in the key leader/manager to be successful (based on what the business needs in the future).
3. Develop an Ideal Candidate Profile for the role you are looking to fill, including minimum and desired requirements.
4. Develop an objective evaluation system for rating potential successors so that all candidates are compared consistently, with little or no biases.
5. Look at the dynamics of the current team (strengths and weaknesses, and look to create a more well-balanced team-hiring someone who is strong where the rest of the team is not).
6. Have a plan and timeline for a gradual transition (training/mentoring, job shadowing, introductions to key customers, etc.).

## **What are 5 ways that undefined structure can create inefficiencies in operations?**

1. Unnecessary overlap
2. Avoidance of accountability
3. Delayed decision making (not knowing who is responsible for what)
4. Working towards different or even conflicting goals
5. Not knowing who reports to who-employees often take advantage of this and go to the person who will give them the answer they are looking for

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# MARCO

*Marco was founded in 1973 and serves customers nationally with over 50 offices throughout Minnesota, Illinois, Iowa, Missouri, Nebraska, North Dakota, South Dakota and Wisconsin. Marco specializes in business IT services, copiers/printers, cloud services, managed services, telecom carrier services, phone systems, document management and audio/video systems. Learn more at [marconet.com](http://marconet.com). Marco's expertise in business IT services includes, LAN/WAN infrastructures, Servers and desktops, Wireless access points, Security, Firewall, Intrusion Detection, Network Management, among others.*

## **What are the five biggest mistakes that companies make regarding cloud computing?**

1. Money is important, but when migrating to the cloud, don't do it for the sake of saving money alone. Not all applications and programs run efficiently in the cloud and still require an infrastructure investment.
2. When it comes to cloud computing, security is an extremely important factor. Not evaluating the data your company works with to ensure your cloud provides the best level of security is a security threat in itself.
3. Choosing a provider based on past IT service experiences doesn't mean they know the intricacies of cloud computing. Choose a provider based on their experience with cloud solutions, not one that your company has had previous experience with.
4. Even as the CEO, CTO or head of the IT department, don't make this decision alone, as it will most likely impact other departments in your business. Consult with all areas and departments that will be affected by this change and understand their needs and concerns.
5. Moving into the cloud alone is another security concern. Deploying, managing and maintaining services in the cloud requires the knowledge and assistance of a cloud service provider. Their specialists are highly trained and experienced in all aspects

## **Three current virus or scam threats that are costly to fix and why:**

1. Ransomware has become more popular as of late. Essentially, a hacker steals yours or your client's information, data and records and demands payment in order for an unlock code. It's a costly fix, not only because of the initial ransom payment, but because of the downtime it costs your company. If you're a paperless, automated company, what would the effects of a hacker have on your organization? Imagine being in healthcare and not being able to access patients' records. On top of lawsuits, lives are literally at stake.
2. Spoofing is another costly fix in terms of scams. This recent threat identically replicates emails and adds a personal touch to the body of the email. It's targeting higher-level executives, financial and accounts payable departments by sending emails from what looks exactly like the company and requesting funds be transferred to outside clients. It appears the emails come from someone inside the company, typically from those mentioned above and even include personalized messages to the individual or department.
3. Phishing has evolved into a more complex threat. On top of phone calls, emails and attachments that appear to come from a reputable company to obtain personal and financial information, it has developed into directing individuals to fake websites nearly identical to reputable businesses. This causes credit card, bank account and personal information to be processed into the fake site with sinister intention.

## **Can you offer six critical steps in disaster planning and recovery?**

### **1. Define your disaster**

a. Don't limit your idea of 'disaster' to only natural disasters. Anything that would cause your business to halt production should be addressed when defining the disasters you need to prepare for.

### **2. Downtime tolerance differs**

a. Downtime is costly. In fact, Gartner reports the average cost of downtime on average is \$5,600 per minute – or \$336,000 an hour! Determine how long your business can operate without a properly-functioning IT environment in order to understand how fast you need to get up and running.

### 3. Disastrous effects

a. Make a list of the effects of each disaster you identified in Step 1 prior to determining your recovery plan.

### 4. Safety nets and redundancies

a. Define your plan and implement. Working with a trusted advisor is recommended. Some common technologies used to prevent threats and prepare for recovery include server redundancies, redundant switches, virtualization solutions and backup solutions.

### 5. Best to test

a. Everything works great until it's tested. It's not enough to come up with a plan to follow, you need to see it work. This will help you troubleshoot and map out everything you need if disaster strikes.

### 6. Implement policies

a. Create effective policies that address disaster situations and share that information with your employees. The more knowledge everyone has, the better off your business will be in the fight against an IT disaster.

## What are the two big mistakes that companies make regarding their IT/Computers/Network, etc.?

**1. Selecting products based on price** – Companies often will select a lower performing product as they feel they are saving money. However, in reality, the few dollars they saved are wasted on wages as the employees are not as productive as they could have been with the slightly more expensive model.

**2. Hanging on to equipment too long** – Most do not have a budget for replacing items on a regular basis, they feel that everything is working fine and don't spend money on it. Everything has a life cycle. Everyone should budget based on life cycle and replace things rather than wait until they break, which can cause an outage.

## Can you offer additional general security concerns/observations?

**1. Security** – Many companies do not put as much emphasis on security as they should be. Often passwords can be seen taped or pinned to walls, server or wiring closets are left unsecure. In one specific case, the server room was off the reception area and the reception area was not staffed. The potential for an unwanted guest or disgruntled employee to obtain physical access could be catastrophic.

**2. Malware and Antivirus protection** – The industry has treated antivirus and malware as two separate items. There is no silver bullet to cure either of these and you must take a layered approach to addressing this issue. Next generation firewalls are including protection to block these at the edge of the network, but the adoption of next generation firewalls has not been great. The potential loss in productivity or data loss can pay for these solutions.

**3. End-user training** – Educating the end-user on computer use and creating a computer use policy can deter bad things from happening. Social engineering testing is being done to determine what training is needed and where potential risks are hiding. Emails have been received by customers where it appeared the CEO requested money transferred to an outside account. However, it turned out to be a spoofed email address. Most people do not pay close enough attention and most people will click on attachments without a second thought, thus having devastating results.

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# ADEMINO & ASSOCIATES, INC.

*Established in 1929, Ademino & Associates provides insurance protection for the particular needs of the people of the Fox River Valley. As an independent insurance agency, our goal is to assist you in all your insurance needs. We will help you manage and plan for all your potential risks. As professionals, we assess your needs and offer you a variety of insurance products to choose from. Service, whether it is in response to an insurance claim or general question, is the most important value we offer you. We work hard to build a trusted relationship with our customers. We strive to make you feel both comfortable with and confident in our abilities by acting as your consultant. We want you to have the confidence in us that your parents may have had and that your children will have.*

## Can you explain five types of insurances that business owners often neglect or don't have enough coverage in?

- 1. Cyber Liability.** Many insurance companies these days are offering some limited form of this coverage. It may or may not be the right coverage. Some policies only protect you and not your customers data.
- 2. Employee Dishonesty.** This may not be a problem in a small, family type shop, but the larger the business gets, the more exposure there is. The age old question is why did Willie Sutton rob banks? Because that's where the money is!
- 3. Pollution Liability.** Does the business have any sort of off premises exposure that could cause harm to another in this regard?
- 4. Business Income.** You would be amazed at how many businesses either don't have this coverage or have a totally inadequate limit. They think they've done a good job by insuring their building and/or business personal property. But the Business Income coverage protects the business itself in the event of a loss.
- 5.** This last one is really something. Hardly a week goes by in which we have the opportunity to work on a new client and we see that the named insured is incorrect. Either the right questions haven't been asked along the way about who owns what and have there been any changes in ownership or structure. It would be a tough pill to swallow paying a premium and then having no coverage because the named insured was wrong.

## After a business fire, what are 5 steps in working with your insurance company?

- 1. Establish documentation and accounting records** both prior to and after the loss. Account for the time you and your staff spend dealing with the loss.
- 2. Provide a building diagram** to inventory equipment. Blueprints of the building would be ideal.
- 3. Evaluate** - In addition to your own loss did you have personal property of others that was damaged/destroyed?
- 4. Communicate** with employees, suppliers and the general public regarding your temporary replacement quarters. Insurance company should work closely with you on this in order to limit your business income loss. Getting your doors open again is top priority. Share any business continuity plans you have with the insurance company.
- 5. Don't be afraid to ask questions!** The claims adjustor is there to help put you back in business. He/she is not your adversary. You've paid a premium for this service. Use it.

## Can you offer steps to reduce worker's compensation fraud?

- 1.** Report injuries immediately to your insurance carrier/agent.
- 2.** Train supervisors how to handle injuries.
- 3.** Be alert to "Monday morning" accidents.
- 4.** Help employees understand worker's compensation. Let them know that fraud is a crime.
- 5.** Investigate immediately when a claim is reported.
- 6.** Always perform a pre-employment background check.

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**Also, download the free mobile app for your Apple or Android device. It's a great tool if you're traveling outside our area.**

# STRATEGIES, LTD

*Strategies, LTD is a promotional marketing firm specializing in branded corporate merchandise, premiums and apparel. They believe in becoming a marketing partner with their clients. They work best when given the client's marketing objectives along with the information concerning the target audience and the budget. They then work within that budget to bring several ideas to the team so that the very best product/solution can be offered to achieve the objectives!*

## **What are five creative ideas for Employee Incentives and Rewards?**

- 1.** As an example of an Employee Incentive Plan, a team member could recommend setting health goals with employees in Q1 to get the year off to a great start! Perhaps the goals could be set to have employees exercise and alter health and eating habits. These new habits could help all participants reach a reasonable weight loss along with other health-related, measurable benchmarks (their own health numbers that they are monitoring). They are then rewarded with a choice of health-related incentives/rewards such as a theme graphic logoed exercise mat or exercise ball, exercise towel and branded water bottle, dependent on budget parameters. Perhaps these are even given out at the front end to encourage those new habits. A wonderful investment in our greatest asset of all...our employees!
- 2.** A Quarter 2 goal could be sales-related, for example reaching a certain increase in sales would result in each employee selecting a branded fleece piece or other logoed apparel chosen to fit the budget.
- 3.** A Quarter 3 goal could be quality-related. For reaching measurable quality benchmarks, an employee might be able to select from several beautiful writing instruments that would not only be logoed but would also carry the employee's monogrammed initials.... encouraging them to "Mark their work with excellence!" In this case, there is a double entendre...marked literally and figuratively with excellence! These types of incentives are very personal and very special to the recipient.
- 4.** A final quarter goal for the year might be geared toward employee engagement. There could be suggestion boxes throughout the offices and warehouses. Employees are rewarded either individually or collectively when great ideas are submitted and implemented. Again the product and communicate would be chosen to reinforce the theme and would fit in the budget.
- 5.** Lastly, an employee recognition program is most complete and effective when his or her anniversary date with the company is recognized. The benchmark years are generally at 5, 10, 15, 20 years and so on. Based on the budget for this recognition (many companies budget \$10 per year of service or more), effective programs may give apparel, crystal or glassware/stemware or have the employee even choose from a range of gifts ensuring they receive something they perceive as useful.

## **Can you share valuable ways to build consistency with a company's brand?**

Consistency is best achieved when a company has clear and concise Branding Guidelines and chooses quality products that are branded very attractively. Recipients love receiving promotional products that are of good to great quality with a long-term ad value. This ensures many Ad Impressions over the life of the product!

## **What are several marketing tips for small business owners on a tight budget?**

**Numero Uno:** Engage with a reputable promotional marketing company that understands the strengths of our medium and will deliver great ideas and products-all within budget! Those strengths being:

- A)** The message of the promotional item is targeted; reputable promotional marketing companies know who the recipients are and target only them. There is virtually no wasted circulation.
- B)** The promotional product is long lasting. A calendar is viewed multiple times a day and lasts the whole year through. A coffee mug travels with the recipient from home to work and the message (theme graphic) or logo is viewed multiple times a day...every day!
- C)** Promotional Products generate goodwill. Virtually everyone appreciates a gift given free and without obligation.
- D)** Done correctly, the promotional product will be a message reinforcer. For instance, a Post-it note cube pad may carry a phantom imprint of your slogan with your logo placed prominently. The post-it notes carry the message that is reinforced over and over...for hundreds of impressions.
- E)** Delivers "Implied Endorsement" Factor: This is a very credible strength indeed! When a friend, customer or employee wears a company branded piece of apparel or hat, for example...one assumes he or she has a very favorable impression of that company.

# STRATEGIES, LTD

In summation, the promotional product does not necessarily have to be an expensive one to be effective. The most important thing is that it has usefulness, is of good to great quality, and has an attractive branded message. If a recipient first notices the usefulness of the piece followed by quality and attractiveness, then there is an 85% plus chance the item will be used long term. HR managers and marketing executives and those commissioned to help brand the company want to know when they call their marketing partners that they can rest assured that the program will be on time and within budget.

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*\*\*A participant may email or call Renaë directly at [rdobbe@strategiesltd.com](mailto:rdobbe@strategiesltd.com) or 920-560-6774 with comments, suggestions or simply to be included in the drawing (no purchase necessary) which will take place on April 15, 2017, their 26th anniversary of business! Winners will be able to choose from 6 branded pieces of apparel with their logo or a tailgate package...each will be valued at \$200.*

# EPIPHANY LAW

*Epiphany Law provides personalized, common sense legal advice in the areas of business law, estate planning and litigation. Within each of these three areas, we apply the same efficient use of people, systems and technology to provide incredible service, superior work product and predictable pricing. We pride ourselves on providing a different experience – a better experience.*

## **Common Estate Planning Mistakes:**

When developing an estate plan, the number of potential omissions and poor choices is almost infinite. However, people generally make seven major common errors. These mistakes can lead to major financial and personal disasters, but they are avoidable.

### **Mistake Number 1: Failure to plan & failure to update estate plan**

*Solutions:*

- Plan for contingencies
- Review and update your estate plan
- Don't leave it to chance or to the government

### **Mistake Number 2: Failure to address Healthcare decisions**

*Solutions:*

- Identify who the health care power of attorney is
- Provide a living will, a clear statement of intent to loved ones
- HIPAA release

### **Mistake Number 3: Failure to Prepare for Incapacity**

*Solutions:*

- Living Trust
- Durable power of attorney

### **Mistake Number 4: Failure to Plan for taxes**

*Solutions:*

- Marital Trust Planning
- QTIP trusts to maximize deductions and protect beneficiaries

### **Mistake Number 5: Failure to Plan for your Children's future**

*Solution:*

- Asset protection through Trusts and/or LLC

### **Mistake Number 6: Failure to plan for Tangible Personal Property**

*Solutions:*

- Personal Property Memorandum
- Communication
- Clearly articulated process

### **Mistake Number 7: Failure to Plan for Post-Death Administration**

*Solution:*

- Create a comprehensive estate plan

# EPIPHANY LAW

## **Non-Compete Agreements**

### ***Defending Your Company from Unfair Competition***

In the employment arena, things are not what they used to be. It used to be that where an employee began working was where he or she retired. It used to be that employees hated your competitors and would never consider leaving to work for them. Unfortunately for your company, the way things used to be is no longer the way they are.

Today, the more valuable your employee is to you, the more valuable he or she is to your competitor – and your employee knows it. In today's business world, unquestioned loyalty from an employee is ancient history. Consequently, your business needs to take proactive steps to protect itself from unfair competition.

Astute employers in the 21st century realize a well drafted Non-Compete Agreement is a powerful tool in protecting your company from employee departures and unfair competition. While such an agreement cannot stop an employee from leaving, a Non-Compete Agreement can help ensure that your business will not lose your key employee and your key customers to a competitor. To be enforceable, such Agreements have to be narrowly tailored to protect your business' legitimate interests.

### **What are 3 Common Non-Compete Agreement Questions?**

#### ***Q: I heard that Non-Compete Agreements are not enforceable in Wisconsin. Is that true?***

A: No. While it is true that Non-Compete Agreements are not favored under Wisconsin law, a well drafted Agreement is and will be enforceable. The key to having an enforceable Agreement, however, is working with a business law attorney who is knowledgeable in the complex and ever-changing laws affecting Non-Compete Agreements.

#### ***Q: What kind of competition can I prohibit?***

A: In general, you can only prohibit activities that would somehow be unfair to your business. This means that you generally cannot require your janitor or stock clerk to sign a Non-Compete Agreement. In addition, you generally cannot prohibit an exemployee from getting a job. However, you can and should prohibit key employees from calling on your customers for a reasonable period of time.

#### ***Q: Can't I just use a form off of the internet?***

A: You can, but you can be nearly guaranteed that it will not be enforceable. The law governing Non-Compete Agreements is very state specific and very circumstance specific. A generic, one-size-fits-all form will never meet your needs and, in all likelihood, will never meet the stringent legal requirements of such agreements. Only by working with an experienced business law attorney do you have any chance of having an enforceable agreement.

# EPIPHANY LAW

## Employee Handbooks

Employee Handbooks or sometimes known as employee manuals are given by an employer to employees to clearly communicate all company policies and procedures. Handbooks communicate expectations to employees and provides employers with a framework to follow when misconduct occurs. Most employers take a "do nothing" approach to managing their employees, and do not adopt written policies or disclaimers. Legally, this may give rise to employment claims for breach of implied contract based on unwritten policies, or even wage claims based on employers' past practices. A well written employee handbook has benefits for an employer: it promotes positive employee morale; it provides a succinct and convenient statement of policies to which the employee is expected to adhere, and the employer has written confirmation of expectations for performance and conduct at work; and it identifies and describes policies that can help with an employer's defense of wrongful discharge, employment discrimination, or other employment-related legal claims.

If a handbook is not correctly written or does not include certain provisions, which are updated annually, an employer may expose themselves to unwanted liability.

### Things that need to be addressed and reviewed annually in employee handbook:

- Handbook and a Contract vs. Handbook as Guidelines
- Defining the Employer/Employee relationship
- Harassment Policies
- Technology Use
- Bring Your Own Device (BYOD) Policies
- Paid Time Off
- Job Requirements and Overtime Rules
- Employee Privacy
- Drug and Alcohol Policies

It is important that your handbook be reviewed by an experienced attorney who has indepth knowledge of Employment Law and related issues.

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# CAREER OPTIONS, INC.

*Career Options, a top provider of professional staffing services, has grown to become one of the elite staffing companies throughout the Fox Valley, Green Bay and Oshkosh by doing one thing: making the effort to understand the needs of our candidates and clients. We specialize in professional, administrative, skilled trades and industrial staffing and 93% of our positions are Temp-to-Hire and Direct Hire. Our years of experience and industry insight help us recruit the most talented people in the market, and we work diligently to find the right match the first time!*

## **What are 4 tips to ensuring new employee success with effective orientations?**

As the economy continues to pick up, more and more companies will be hiring. While this is exciting news, some companies will be ill-prepared for the onboarding process. The result? An unhappy or unmotivated new employee who becomes disengaged quickly.

Being in the staffing industry for twenty years, we have received feedback from many candidates that we have placed. Most of the initial feedback is good; however, occasionally, the comments are less positive. Whether it is an accountant, customer service rep, welder, or sales candidate, the comments can apply to any organization.

When things do not go well for the new employee, it can have distressing results for both parties. Companies invest a great deal of money in interviewing, screening, and selecting a candidate. However, they often fail miserably with the orientation process. Here are some suggestions that people have offered for the next new employee coming onboard:

- 1. Prepare BEFORE the Employee's First Day** – This entails having the work station set up and computer and cell phone ordered. It means having the email account and password created or tools placed by the work bench. Perhaps it may be calling the supplier for new uniforms or ordering cubicles if available office space is minimal. Many employees are excited to start learning the job but comment on having to sit idle for 1-3 days because nothing was set up prior to them arriving. This poor first impression leaves the feeling that the company is unorganized all the way around.
- 2. Have a Plan the First Day** – Have someone introduce the new employee to staff and offer a tour (explain the key aspects such as timecard process, bathroom location, lunch or break room area, best place to park, etc.) Go over new hire paperwork, employee manual, and general procedures all at once. It was also suggested to give trainers/supervisors advance notice so they have time to dedicate to training. Often employees feel the manager or co-worker is overworked and frustrated in having to “deal” with the new person.
- 3. First Week** – If time permits, take the employee to lunch or offer to walk with them to the break area. Assign a mentor or buddy system so the new employee has a go-to person regarding general policies, safety issues, or company expectations. Explain the training agenda and have open conversation regarding feedback so the employee feels more comfortable asking questions. If possible, split training with several people that week to break up monotony and help supervisors avoid frustration, if it is hard to commit to 40 hours of training.
- 4. First through Third Month** – Please do not forget about the new employee after the first week! This time period involves a lot of learning and employees are often nervous. They want to excel but since managers are often pulled into many directions, they may feel forgotten at times. Remember to check in, go over expectations and offer constructive feedback. Candidates typically welcome feedback because it helps them understand what they are doing well and what they need to improve on. Some candidates suggested using a checklist so both parties could break down the learning into specific tasks. This helps to have a plan of action for moving forward.

Well planned orientations are key for both parties and the payoff is well worth it! It is no longer just companies evaluating employees during the first 90 days, it is now the other way around. If a new employee does not feel welcomed or properly trained, they will question their desire to remain long-term. Organize an effective onboarding and orientation plan now and retain your key employees for many years to come!

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# KERBERROSE

*KerberRose is a Wisconsin certified public accounting firm dedicated to serving the people and businesses of Northeast Wisconsin. With over 80 professional staff members and offices in Shawano, Green Bay, Fox Cities, Clintonville, Sturgeon Bay, Sister Bay, Rhinelander, Oshkosh, and Wausau, we combine the expertise of a leading regional firm with the convenience, familiarity and passion of a local provider.*

## **Explain some key issues to consider when using QuickBooks:**

1. Are you looking at outstanding checks and deposits on the reconciliations to determine if checks need to be re-issued or written off as duplicates?
2. Are you looking at the aged accounts receivable report to follow up on collections?
3. Are there any zero balance accounts receivables that are on the aged receivable report that need to be "cleaned up" by applying any credit memos to invoices?
4. Are you using the description field in screens to document anything that may be helpful when looking back at the transaction?
5. Are you separating the principal and interest portion of note payments?
6. Are you using the closing date function with a password to prevent accidental changes to balances that have already been used for reporting on tax returns – corporate returns, payroll returns, sales tax returns?
7. If you have a company retirement plan, and you process payroll through QuickBooks, do you have the company match payroll item setup up to avoid manual calculations?
8. If you process payroll through QuickBooks, do you have procedures in place to handle end of year payroll issues?
  - Bonuses, including Christmas bonuses/gifts
  - Personal use of company vehicle
  - Group term life insurance over \$50,000 of coverage
  - S-Corporation health insurance
  - Changing the state unemployment rate for the upcoming year for proper calculation of expense and accrual for the new year
9. Are your vendors properly set-up to do your 1099 reporting at year-end?

## **What are six questions to ask when interviewing a CPA/CPA firm?**

1. What is your background? Education, work experience and credentials?
2. What type of clients/industries do you typically work with?
3. What are your fees? Not just hourly rates but the typical fee for the type of services you will be requesting.
4. Can you provide 2-3 references from current clients?
5. What other staff might be expected to work on your account?
6. Is there a clear succession plan if my CPA is nearing retirement or is unable to continue working for whatever reason?

## **Explain five common (big picture) business mistakes:**

1. No discussions with the appropriate professions prior to completing a significant business transaction.
2. Not keeping the bank informed of anticipated cash-flow needs or when financial results are below expectations.
3. Not developing a business succession plan (or allowing enough time to implement a plan)
4. Not having adequate insurance to cover unexpected negative events.
5. Not recognizing who the business's key employees are and taking appropriate steps to retain them.

## **For more information regarding these topics, please contact:**

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**On behalf of Career Options staffing firm, we hope you found this information valuable.**

**Thank you for being part of our community and we wish your organization great success!**