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trekking

**practical strategic thinking and action
newsletter issue #84**

seven years running and time for a change

This issue marks the completion of seven years of monthly issues of Trekking. When we started out in 2004, using Constant Contact, newsletters weren't as common as they are today. Now there are lots more. Feels like time for a change.

I don't want to give up this newsletter because I still hear back from regular readers, especially when we write something that resonates. So I will continue publishing (same time as always) but with some changes.

Where from here? Shorter and punchier. Stories and announcements. Occasionally a book review or a joke. Maybe a little more focused, too. I have written about a lot of aspects of management over the years. Since our book [Intangible Capital](#) was published last year, our consulting practice has been more focused than ever on helping private companies improve performance and value by leveraging the 80% of their value that resides in IC.

So beginning next month you'll see (via short stories) how managing intangible capital is helping companies build value and preparing for ownership transition.

Announcements will continue because there's a lot going with the Exit Planning Exchange, speaking gigs, and the occasional marathon.

Thank you for your support over the years and I look forward to staying in touch. See you next month, same time, same place.

announcements

Wednesday, April 13 at 400 Trade Center, Woburn, MA, I'll be speaking at McLane, a law firm in New Hampshire and Woburn, MA. The





theme: [Getting Paid Twice: Performance Today and Value Tomorrow.](#)

Thursday, April 14, at Babson College in Wellesley, MA, Robert A. Gough, Jr., Ph.D. economist, educator, on-air personality and President and CEO of G-ovation, will candidly assess how we got to where we are as the U.S. economy and economies of other major powers all now operate within the same wide angle lens of interdepe



ndencies, global implications, and outcomes of policy decisions. Think globally and act globally is the new reality - it now must become the new norm for behavior. At this [breakfast event](#), Gough will discuss the need for innovative and internationally integrated solutions.

Tuesday, April 26 at the Hartford Club, Hartford, CT XPX - CT will have a [breakfast meeting](#): Family Dynamics: Managing a Difficult Business Transition. This will be a case study in three parts focusing on a family-owned business in



transition featuring a reluctant/incapacitated father and feuding children. Mike Camerota (Touchstone Advisors) will play the role of the consultant, John Lawrence (Shipman & Goodwin) and Robin Bienemann (Crimson Rook, LLC) will play the father and daughter roles, and Paul Sessions (Director, Center for Family Business at the University of New Haven) will be a commentator.

Tuesday, May 3 at the Pyramid Club, Philadelphia XPX - Philadelphia will have a [breakfast event](#) at the Pyramid Club on Tuesday, May 3. Tom Coffey, B2BCFO, will present a



program on Exit Planning Alternatives for Privately Held Companies. Tom has over 30 years of diversified management experience working with both public and private companies ranging in size from start-up to \$8 billion. In the last several years Tom has assisted clients in completing sell-side and capital raising transactions in excess of \$250 million.

Wednesday evening, May 11, I'll be a panelist at the

Merrimack Valley Venture Forum's program: Managing Mergers & Acquisitions. This [panel discussion](#) will help owners evaluate whether their company is already positioned to reap its intrinsic value when the unexpected event or unsolicited offer puts the



company in play or whether the owner will be heard to say, "I wish I took the time to be prepared." Other panelists include Michael Cassata, Managing Director, Consilium

Partners, Thomas Davidow, Thomas D. Davidow & Assoc., and Larry Ginsberg, CBIZ Tofias. Bill Rodgers, Partner at Tarlow Breed Hart & Rodgers, will moderate.

Finally, our firm is on the planning team for a conference in Washington D.C. in mid-May on intangibles. Fed Chairman Ben Bernanke will be a keynote, speaking on intangible capital (wow). I'll be sure to let you know what he has to say!

about trek consulting

Trek works with privately-held businesses to develop and execute action plans for growth, frequently by identifying, assessing and improving the intangible capital in a firm. Trek also works with the owners to prepare for their successful exit by coordinating the resources necessary to increase and preserve the firm's value, creating the succession plan and assembling the right transaction team, financing and post-transaction plan. Trek Consulting is one of the founding partners of the Exit Planning Exchange ([XPX](#)). Trek's principals co-authored [Intangible Capital: Putting Knowledge to Work for the 21st Century Organization](#).

Our clients report improved market focus, greater revenues, better margins and increased profits. To learn more about Trek Consulting and how we can help you improve your company's results, visit us on the web at www.trekconsulting.com or call us at 781.729.1008.



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