



Transitions

2023 Small Giants Community Summit

Hello + Welcome

Hello Small Giants and welcome to Detroit!

We're thrilled to see many of you again, and meet more of you for the first time! We chose the theme Transitions for 2023 because it feels like a conversation we've been having with our Community a lot lately. Sure, transitions are a natural and constant part of life, but over the last year, the topic has felt more pronounced. Transitions out of old roles and into new ones; transitions in how (and where) we work; transitions in mindset. Some are harder to face than others, but going through any transition takes courage, and we know that's something that the Small Giants Community has in spades.

Through our wonderful speakers, we're excited to highlight some amazing transition stories, and also offer you tools to help with your own transitions. Just like every year, we're welcoming leaders from all over the country, as well as internationally, to Detroit. The stage is set for an incredible couple of days and we're confident you'll walk away with practical systems, ideas, lessons and lots of friendships! Here's to growing with purpose!

The Small Giants Team

Paul, Hamsa, Annie, Bridget



Summit Staff

If you need anything from the Small Giants Community team, you can email the whole crew at hello@smallgiants.org. If you need immediate assistance, please call or text us.

Dress Code

We believe that comfort helps with learning! Business casual or smart casual is great for the conference portion & evening receptions. Jeans are good too!

Michigan Weather

Ever heard about Michigan weather? It's totally unpredictable. It could be sunny and 65 or chilly and pouring rain. We can plan for every other detail but we can't control the weather. So, we recommend you dress in layers.

Transportation

Airport ground transportation should be booked individually by attendees. Uber and Lyft are the most cost efficient ways to go. Our evening reception transportation to the Ford House is hosted by our partner, the Detroit Bus Company.

Join the Conversation

twitter.com/smallgiantsbuzz
Instagram + LinkedIn
[@smallgiantscommunity](#)
[#SGCSummit2023](#)

Detailed Agenda: <https://content.smallgiants.org/2023-summit-agenda>

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Thank you to our Sponsors



Text-Em-All keeps people informed when it matters most by delivering personalized, informational, emergency text messages and phone calls fast —whether they're going to five people or 50,000. Text-Em-All is a 2018 Forbes Small Giant and several of their leaders have graduated from the Small Giants Leadership Academy. Their sponsorship supports our evening reception at the Ford House, allowing us to connect with our fellow Small Giants leaders over cocktails and conversations.



AssistPro provides business leaders with U.S.-based dedicated virtual executive assistants tailored to meet your specific needs. They match based on a relational fit so assistants work well with your personality and communication style. Their sponsorship will allow us to connect over a delicious lunch.



Essential Ingredients partners with consumer brand companies and contract manufacturers to provide quality personal and home care ingredients quickly and reliably. Essential Ingredients is a 2017 Forbes Small Giant and several of their leaders have graduated from the Small Giants Leadership Academy. Their sponsorship supports our evening experiences, where we'll get to explore different spaces in Detroit and share more quality time with our new Small Giants friends!



The Great Game of Business, an SRC Company, is a growth system designed to build healthier companies, better businesses, and better lives. With four decades of real-world experience, The Great Game of Business understands your business and has an adaptable system to build the company you've always dreamed of. Their sponsorship is going towards programming to develop the next generation of Small Giants leaders.



imageOne exists to optimize your print and document environment by implementing a managed print program. They support your team in creating a better office workflow by automating your document process, securing your print devices, and providing you with the latest tools and software that protect your organization from data breaches and cyberattacks. Their sponsorship supports the creative elements of this year's Summit, allowing you to sport some Small Giants swag.



FMS Financial Partners, Inc. strives to be a leading provider in the delivery of employee benefits consulting, risk management and wealth management solutions. They are a valuable member of our Sounding Board mentorship program and their sponsorship helps us capture the great Summit content via video recording.

Thank you to our Sponsors



Pegasus' experienced team of pioneers works with you to build a tailored logistics solution specific to your supply chain. There's no one-size-fits-all approach, only custom solutions. Think of Pegasus Logistics as an extension of your company. They know with freight forwarding market leadership comes responsibility — a responsibility to improve and succeed. Their sponsorship supports our evening experiences, where we'll get to explore different spaces in Detroit and share more quality time with our new Small Giants friends!

TastyCatering

Chicago's best caterers, **Tasty Catering**, prides themselves in providing delicious meals, excellent customer service, and the best possible employee culture. They are a 2016 Forbes Small Giant and also voted as one of Illinois' most psychologically healthy organizations. Tasty Catering has had leaders participate both in the Small Giants Leadership Academy and Sounding Board, our mentorship program. Their sponsorship will offer up a delicious lunch spread.

taylor | english
the purpose-built law firm®

Taylor English is a purpose-built law firm with attorneys working across various practice areas and industries. They've had multiple leaders go through our Leadership Academy. Their sponsorship allows us to travel in style to Wednesday's evening reception via the Detroit Bus Company.



TIME VALUE OF MONEY



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BOXD

Better Organizations by Design



EST. 2012



FLOWERS FOR DREAMS

Agenda — day 1

Day 1: May 3rd

Breakfast

8:00 am – 9:00 am

Welcome from the Small Giants Community Team

9:00 am – 9:15 am

It's Not About the Bag

Conni Reed

9:15 am – 10:00 am

Break

10:00 am – 10:30 am

Developing a Mindset of Success

Sarah Crane & Marty Maddin

10:30 am – 11:30 am

Transforming Lives by Transforming Work

Sam Adiv

11:30 am – 12:00 pm

Lunch

12:00 pm – 1:00 pm

Track 1:
Founders & CEOs

**How to View – and Run –
Your Company Like a
Financial Asset**

Ryan Tansom

1:00 pm – 2:00 pm

Track 2:
Emerging Leaders

**Beyond the Logo:
Marketing Your
Authentic Brand**

**Melissa Pudar
& Casey Wood**

1:00 pm – 2:00 pm

Break

2:00 pm – 2:30 pm

Acquire Your Greatness
**Delcie Bean , Loren
Feldman, & Camille Nicita**

2:30 pm – 3:30 pm

Don't "Grow Broke"
Tracy Bech

2:30 pm – 3:30 pm

**Find Your Footing,
Trust Your Gut**
Elizabeth Glasbrenner

3:30 pm – 4:00 pm

**Blooming a Culture
of Transparency**
Steven Dyme

3:30 pm – 4:00 pm

Evening Reception

The Edsel & Eleanor Ford House

6:00 pm – 9:00 pm

Agenda — day 2

Day 2: May 4th

Breakfast

8:00 am – 8:55 am

Opening Remarks from the Small Giants Community Team

8:55 am – 9:00 am

Succession Success

**Josh Britton, Rob Dube, Shari Erdman,
Loren Feldman, & Kyle Smith**

9:00 am – 10:00 am

Break

10:00 am – 10:30 am

Seek Them, Celebrate Them

**Shannon Cohen
& Jen Trakhtenberg**

10:30 am – 11:30 am

When Justice is Right at Home in Business

lisa wise

11:30 am – 12:00 pm

Lunch

12:00 pm – 1:00 pm

Track 1:
Founders & CEOs

What's Your Type?
Ami Kassar

1:00 pm – 2:00 pm

Think Tanks
2:00 pm – 3:00 pm

Track 2:
Emerging Leaders


**The Connectivity of
an Employee's Journey**
Elnian Gilbert

1:00 pm – 2:00 pm

Movin' On Up
David Abell & Matt Hoying
2:00 pm – 3:00 pm

Meditation + Wrap Up

3:00 pm – 3:15 pm



Speakers



David Abell

CEO & President – AM Transport Services

David Abell is the CEO and President at **AM Transport Services**, a small, family-owned freight brokerage in Olney, Illinois. A former Army Engineer, David started his logistics journey in technology and moved on to marketing and sales before taking over as CEO.

He enjoys the fast-paced and ever-changing landscape of the logistics industry and working with the great team at AMT.

In his spare time, David teaches a business class at the community college, reads as many books as he can fit in, and works on his 1966 Ford Custom 500 project car. He and his wife Paige have two smart, funny, and strong-willed children who love to travel as much as their parents (ask him about the family Christmas adventure). So far they've visited six National Parks with plans to check out a few more.



Sam Adiv

Founder & CEO – OpenTent

Sam is the Founder and CEO of **OpenTent**, a 22-person Salesforce consulting partner for purpose-driven teams. OpenTent is building a world in which the organizations working on the most important social issues of our time have the platforms, people,

and processes to work with confidence.

Sam tries to bring a Beginner's Mind to every room and use his curiosity about the world to create meaningful growth experiences for his team and clients. He almost went to rabbinical school and now finds ways to bring those traits to his team at OpenTent, leading with vulnerability and encouraging it in others, and creating space for the team to be who they are. He sees the power of every human to grow and change: he used to dislike running and dogs, and now runs several miles each week and is totally obsessed with his puppy. Originally from rural Maine, he now lives in Denver with his wife Amalia and brand-new son Lev.



Delcie Bean

CEO – Paragus IT

Delcie Bean started the company that became **Paragus** when he was 13 years old. As Paragus has become one of the most successful, fastest-growing IT firms in the region, Delcie has increased his commitment to humanitarian causes and dedication to the community. In 2014, he created Tech Foundry, an educational nonprofit designed to address the need for a skilled IT workforce in the region by providing in-depth training for underrepresented communities. He also believes in giving back to his employees.

Paragus has a unique Employee Stock Ownership Plan (ESOP) structure that puts ownership of 40% of the company in the hands of its 50-plus employees. Paragus is a Forbes Small Giant company.



Tracy Bech

Partner – 60 Minute CFO

Tracy Bech (she/her) is a serial entrepreneur having started, run, and sold 2 successful businesses. She's passionate about lowering the business failure rate by educating business owners and leaders about best practices and business strategy. She is a partner at **60 Minute CFO**, a consultancy based on the eponymous book that helps business leaders better understand their financial statements and finally understand what their CPA, banker, and CFO are telling them. She is also CEO of Starboard Collectives which facilitates groups of CEOs in the moving and storage industry where they share financial analyses, best practices and focus on business development.

A serial entrepreneur, Tracy loves thinking up business ideas and writing business plans for fun. When she's not focused on business, you can find her in her native habitat (The Pacific Northwest) wearing a puffy coat and trucker hat. She's a mom of 2 curious kids and wife to an inventor husband.



Josh Britton

President & CEO - imageOne

Josh is President & CEO of managed print services provider, **imageOne**. Based in the Detroit, MI area, iO was founded 30 years ago with a single purpose: to deliver the X to everyone, everyday, everytime.

The X is genuine care that consistently drives extraordinary energy, actions and experiences. iO helps clients optimize their print environments, secure their IT environments, and implement workflow solutions.

Josh joined iO in 2018 as VP of Operations. He has three perfect school aged kids (Teddy, Cece, Lou) and an amazing wife (Ali) of 20 years, who met as undergrads 25 years ago at Northwestern University. In his free time Josh enjoys yoga, reading, and building forts with his kids.



Shannon Cohen

Founder & CEO - Shannon Cohen, Inc.

Shannon is the Founder and CEO of **Shannon Cohen, Inc.**, a company of hope dealers curating products, spaces, and experiences that nourish human souls. The products have been featured at Target, Meijer, and West Elm. Shannon's "Tough Skin, Soft Heart"

podcast is available on Anchor, Apple Podcasts, Spotify, and Stitcher with subscribers spanning 12 countries.

Shannon is also Founder of the global Rockstar Woman™ Brunch, serving nearly 1000 women throughout the U.S and Canada annually. For the past two years, she has been named one of the 200 Most Powerful Business Leaders in West Michigan and one of the 50 Most Influential Women in West Michigan by the Grand Rapids Business Journal. She is an alumnus of the prestigious W.K. Kellogg Foundation Community Leadership Network Fellowship, proud mom of a 3rd grader, and celebrating 13 years of "I do" with the love of her life!



Sarah Crane

COO – Peak Performance International

As COO at **Peak Performance International**, Sarah Crane helps make the company's vision – to help leaders reach their full potential – a reality. With prior experience at a Big 4 accounting firm and non-profit organizations, Sarah uses her background

in leadership development, organizational effectiveness, and change management consulting to meet the needs of clients in a variety of industries and roles. She has an MBA and degrees in economics and geology from the University of Michigan.

Sarah lives in metro Detroit with her husband, child, and two cats, and spends her spare time exploring local parks and finding the best places for a long walk. If you run into Sarah at the Summit, be sure to ask her about books – she's a dedicated participant in her library's annual summer reading challenge!



Rob Dube

Co-Founder – imageOne

From Blow Pops to Forbes Best Small Companies! Rob started his first business in high school selling Blow Pops out of his locker. In 1991, he co-founded imageOne, which has been recognized as a Top 25 Small Businesses in America on the list of Forbes

Small Giants, an Inc. Magazine Best Places to Work, and as the number one Top Workplace in Michigan.

Rob is the Visionary/CEO of *The 10 Disciplines for Managing and Maximizing Your Energy*, a coaching program that helps entrepreneurs build the inner foundation to maximize their impact in business and life. He is the author of the best-selling book, *donothing,™ the most rewarding leadership challenge you will ever take* and the host of the donothing retreat and Leading with Genuine Care podcast. Rob challenges business leaders to look inward with mindfulness and meditation by sharing his own journey.

Rob has completed 14 marathons, is an avid meditator, and loves living next to his mother-in-law in Northern Michigan.



Steven Dyme

Co-Founder & CEO – Flowers for Dreams

Steven Dyme is the Co-Founder & CEO of **Flowers for Dreams** – the first B Corporation flower brand with locations across Chicago, Detroit, Milwaukee, and Minneapolis. Once named among Business Insider's 20 Most Inspiring Companies in America, their

Midwest-based business donates to a different charity with every bouquet sold. To date, that's resulted in over \$1.1M donated to some 220 small neighborhood nonprofits – all from the sale of flowers.

Steven is considered a leading voice on impact entrepreneurship in the Midwest, having served on the Illinois Governor's Task Force on Social Innovation, Entrepreneurship, and Enterprise, being awarded the Mayor of Detroit's Spirit of the City Award for their justice work, and penning op-eds on ethical business for Crain's, Forbes, the Chicago Sun-Times and more.

Steven is based in Chicago. He makes a mean homemade ice cream, and he's happy to talk to you about dinosaurs if the opportunity arises – particularly his favorite, the ankylosaurus.



Shari Erdman

President – Reell

Shari Erdman has been at **Reell** for 19 years and served in many roles throughout the organization, her longest tenure as the VP of Global Coworker Services (HR). In February of 2022, Shari was promoted to President and began a two year succession to CEO.

She loves Reell because it is a company that cares for its people and is committed to "Doing What's Right." Reell is a service-oriented company and Shari is passionate about serving all constituencies with excellence while upholding Reell's core values. She earned her BA and MBA from the University of Northwestern. Her current role as President includes overseeing the global responsibilities of Coworker Services (HR), Sales, Operations, Engineering and Quality. Shari also serves as an Officer and ESOP Trustee.

After work, Shari enjoys spending time with family. Shari's husband is a teacher and they have three children, two grandchildren and two more on the way! Shari also enjoys spending time on the lake in the summer and gardening.



Loren Feldman

Founder & Editor-in-Chief – 21 Hats

Loren is Founder and Editor-in-Chief of **21 Hats**, an online community for business owners. He hosts the 21 Hats Podcast, a peer group conversation that has been tracking the experiences of 10 business owners for more than three years. He also edits the 21 Hats

Morning Report, a daily email newsletter that has been named the best newsletter for business owners by Inc magazine. Previously, he was a senior editor covering entrepreneurship at Inc, Forbes and the New York Times. He has also been editor-in-chief of Philadelphia magazine and executive editor of George magazine. He has spoken and moderated discussions at numerous conferences and seminars on entrepreneurship.

Loren is based in New Jersey. If you're a baseball fan, ask him about his time working as a coach with the Texas Rangers at their training camp in San Pedro de Macoris, home to more shortstops than any other place on Earth.



Elnian Gilbert

Trainer & Keynote Speaker – ZingTrain

Elnian's 16+ years of experience at Zingerman's includes multiple businesses and positions, from her start at Zingerman's Mail Order to logistical experience at **ZingTrain**. Elnian brings this breadth of experience to her role as a trainer, sharing

Zingerman's approach to business through ZingTrain's public and personalized training, facilitation, and keynotes.

As the most tenured trainer at ZingTrain, she's covered every topic on offer! Her particular areas of expertise are customer service, visioning, employee training, open book management, change management, and leadership. Elnian finds it exceptionally rewarding to figure out what a client needs, then tailor training to deliver it; helping them adapt and apply the tools and techniques used at Zingerman's successfully. Elnian's style is engaging, humorous, and full of real-world stories. She enjoys connecting with participants from a wide array of industries.

Elnian lives in Michigan, and around the holidays, you can find her planning for her annual murder mystery party that she hosts for friends!



Elizabeth Glasbrenner

CEO – Smiley Technologies

Elizabeth is the Co-founder of **Smiley Technologies, Inc.**, and she has been President and CEO since 2015. Smiley provides the software and services for community banks across the country. Elizabeth co-founded the company with her brother, and

never imagined that she would be CEO. As a very people-oriented leader, Elizabeth believes putting people at the core of the organization's culture is the crux of their success.

When she's not working, Elizabeth enjoys problem-solving, hiking, traveling, and spending time with her family outdoors. Elizabeth lives in Arkansas with her two teenagers, Grace and Gavin, and her extreme athlete/motivational speaker husband, Jeff. Oh, and she has her pilot's license – who's ready for takeoff?!



Matt Hoying

President – ChoiceOne Engineering

As a husband, father, and president of the 70 person, two-office company **ChoiceOne Engineering**, Matt gets to live his vision daily of "being a positive impact for others so that we are enjoying life together." The one thing that has remained constant in all of his

roles has been the need to continue learning and becoming a better version of himself. He is a continuous learner and believes there is something to learn from everyone; he learns as much from conversations with his young kids and seeing how they process the world, as he does from business leaders and friends. Matt looks forward to learning from everyone attending the Small Giants Community Summit.

Matt lives in Ohio with his wife and children. His original plan was to be a math teacher, until his high school math teacher told him he wouldn't be good at the job. Matt admits that his teacher was right, and we sure are glad that we get to benefit from this career switch!



Ami Kassir

Founder & CEO – MultiFunding

Ami, Founder and CEO of **MultiFunding** and author of *The Growth Dilemma*, has earned a national reputation as a thought leader in business finance. An in-demand speaker and trusted advisor to growth-focused business leaders, Ami has helped

thousands of business owners achieve ambitious growth goals through creative and personalized funding solutions. His work has helped create tens of thousands of jobs. For more than 20 years, Ami has challenged executives to think differently about how they capitalize growth. Regularly featured in national media including The New York Times, Huffington Post, The Wall Street Journal, Entrepreneur, Forbes and Fox Business News, Ami also writes a weekly column for Inc. Magazine. He has advised the White House, the Federal Reserve Bank and the Treasury Department on credit markets. Ami regularly speaks at corporate, academic and industry events on topics including entrepreneurship and access to capital.

Ami was born in South Africa, and he currently lives in the suburbs of Philadelphia with his wife, two children and his Corgi-Spaniel.



Marty Maddin

Founder & CEO – Peak Performance
International

Marty is the Founder and CEO of **Peak Performance International**, a coaching and training company committed to helping successful leaders reach a level of confidence, performance, and fulfillment

beyond what they thought was possible. His experience includes working closely with C-level executives and senior leaders at some of the world's top companies. He holds a psychology degree from the University of Michigan and a J.D. from the University of Wisconsin.

Marty lives in Metro Detroit with his wife, two children, and dog. He enjoys serving on Boards of Directors for non-profit organizations, and when he's looking for some fun, he competes in triathlons with his friends.



Camille Nicita

Managing Partner – Human8

Camille leads the **Human8** business across North America. Human8 encompasses the regional acquisition of Gongos, Inc., of which Camille became sole owner and CEO in 2012.

Camille actively consults Fortune 500 brands to make business decisions on behalf of consumers. She believes operationalizing human centrality as a strategy for growth and building cultural buy-in has a harmonizing effect on stakeholders. Beyond driving behaviors through insights, impactful communication, and change management initiatives, she believes adopting an 'outside-in' approach to humanizing consumers is essential in a world where data is trying to win.

Camille is an active member of the board of the Insights Association, a contributing member of the Forbes Agency Council, an official judge of the North American Customer Centricity Awards, and sits on the Board of Detroit-based Forgotten Harvest. She has served as Chairperson of the Advisory Board of Michigan State University's Masters in Marketing Research Program and has contributed to the University of Michigan's Institute for Survey Research.

Camille, her husband, three adult children and Westie, Gus, reside in suburban Detroit, MI.



Melissa Pudar

Senior Graphic Designer – Phire Group

Melissa Pudar is a senior designer at **Phire Group**, a brand definition and activation consultancy based in Ann Arbor, Michigan. Phire Group takes a non-traditional approach to marketing, focusing

on transforming brands through deep cultural impact. In her role, Melissa works with a wide range of clients and her team to tell authentic stories and inspire connection through bold visual experiences. She has a love for problem-solving to create a brand identity that is unique to an organization's true purpose and potential. With a fine arts degree from the University of Michigan, Melissa combines logic, strategy, and creativity in her projects.

In her spare time, Melissa enjoys cooking for her friends and family, making things with her hands (currently learning ceramics!), and hiking through the Michigan woods. She lives in Ann Arbor with her husband and two cats.



Conni Reed

Founder – Consuela

In 2005, after many uninspiring years in the corporate grind, Conni found herself sitting on a beach trying to figure out how to have more meaning, passion, and fun in life. Conni returned from that trip and started

Consuela. In her childhood, she spent her happiest memories bumping along dirt roads in interior Mexico, and it became part of her heart and her happy place. Since the brand's official launch in 2006, Consuela has created prints, textiles, and a line of totes and handbags. Consuela's team and offices are located in both the U.S. and Mexico. Conni leans into the power of meaningful relationships– Consuela's products are manufactured in Mexico by artisans, multi-generational family factories, and friends formed through years of trips and relationship building.

Conni celebrates the accomplishments of women through her company's "It's Not About the Bag" program, which has recognized over 1000 women thus far. Her company's mission is to share joy, celebrate individuality, and make each day ridiculously awesome!



Kyle Smith

CEO – Reell

Kyle Smith joined **Reell** in 2006 as President and was appointed CEO in 2009. Headquartered in St. Paul, Minnesota, Reell has been designing and manufacturing innovative motion-control solutions since 1970. Kyle attended the University of Missouri at

Columbia on a music scholarship and graduated with a BS in Chemistry. He also attended Brown University in Providence, RI and received a Ph.D. in Solid State Chemistry.

Kyle formerly was at Eastman Kodak focused on medical imaging R&D where he worked with laboratories in France, Italy and Japan and manufacturing facilities in North America, Brazil, France, and China. He also worked at Hill-Rom in Batesville, IN and over the next three years, Kyle held positions that included: Executive Director of Strategic Marketing, VP of Research and Development and Acting General Manager for the Care Division.

Kyle is blessed with a wonderful wife, Diane, and two children who are now accomplished young adults. Kyle enjoys doing community work through a local church, traveling, camping, gardening, riding ATV's and is an ardent fan of the KC Chiefs.



Ryan Tansom

Co-Founder & Chief Revenue Officer – Arkona

Ryan Tansom started his entrepreneurial career at his family business where he was the Executive VP and responsible for the strategic, operational, and financial strategy of the \$21 million company.

Ryan helped turn the company around and bring intentional focus to the right strategies which enabled it to be sold for 8 figures to a local competitor in 2014.

Ryan took his experience and founded **Arkona** to create the Intentional Growth™ Framework which helps owners view – and run – their company like a financial asset through educational training, fractional CFO services and strategic planning. Ryan also hosts the popular Intentional Growth™ podcast that has 325+ episodes, and 430k+ downloads. After 400+ Intentional Growth™ Training sessions and hundreds of podcast interviews, Ryan has his finger on the pulse of the market like few others.

When he's not working, Ryan enjoys spending time with his wife and their twin daughters, working out (and documenting the results!), and practicing transcendental meditation.



lisa wise

Founder – Flock DC

lisa wise is the Founder of **Flock DC**, a family of real estate management companies that tend to over two billion dollars in property throughout the District proper. She is also the Co-Founder and

Chief Relationship Officer of BirdWatch, a home management/property technology company.

In 2022, lisa finished her business book/memoir *Self Elected: How to Put Justice Over Profit and Soar in Business*. At this time, Flock also launched the birdSEED foundation, a philanthropic effort to advance economic and housing justice for the BIPOC community. birdSEED offers no-strings down payment grants to first-time BIPOC home buyers in the DC region.

When not change-making and homemaking, you can find lisa surrounded by pets and hiking DC's famous Rock Creek Park with her best friend – her ten-year-old son Beckett. And if you're ever on the hunt for new music, be sure to chat with lisa – she used to be a DJ!



Jen Trakhtenberg

Co-CEO – ClearVision Optical

Jen Trakhtenberg is the Co-Chief Operating Officer of **ClearVision Optical**. She developed and designed the company's intern training program, from which the company has effectively grown their CVO family.

She enjoys mentoring colleagues in the areas of performance management, teambuilding, talent scouting and career development. She also cultivates dynamic philanthropic campaigns, holiday celebrations, motivational exercises, and networking activities that keep employees energized and connected.

Jen graduated Summa Cum Laude from Binghamton University with a Business Management degree and holds a Master's in Industrial/Organizational Psychology from NYU. She was honored as one of the Top 50 Most Influential Women on Long Island by Long Island Business News in 2021 and was recently awarded a Leadership Scholarship by the Optical Women's Association. Jen resides in Long Island, NY with her husband and two children. She loves traveling, fitness classes (yoga, cycling, Zumba), reading and listening to great business podcasts (aka grown-up fairy tales) while walking.



Casey Wood

Senior Account Executive – Phire Group

Casey is a senior account executive at **Phire Group**, an Ann Arbor-based brand research, articulation, activation, and measurement company. The agency was founded in 2004 to help organizations unearth authenticity and unleash possibility in order to

connect, inspire, and create action. In his role, Casey manages accounts for purpose-driven organizations in Michigan and throughout the country ensuring alignment with client strategies and goals, communicating with clients on a daily basis, and expanding relationships. He graduated from Miami University with a Marketing degree and crossed state lines following graduation to join the team at Phire Group.

Casey lives in Metro Detroit with his lovely fiancée and rambunctious golden retriever. When away from his desk, you can often find him in the kitchen, on a long walk with the dog, at one of Detroit's many excellent concert venues, or with his eyes glued to the TV watching the latest HBO hit.

Coaches



Mary DeYoung

Predictive Index Engagement Manager -
Palladian West

Mary works at **Palladian West**, an executive search and team architecture firm dedicated to helping businesses find exceptional talent and build dream teams. She uses the Predictive Index to provide

teams with the people-centric data to support their business strategies, helping teams reach results they didn't believe were possible. She has an educational background in social work and years of experience working in a variety of industries.

Mary lives in Grand Rapids, MI. In her free time, she loves reading Louise Penny mystery novels.



Dave Haviland

Founder - Phimation Strategy Group

Dave Haviland is Founder of **Phimation Strategy Group**, where he provides management consulting to leadership teams at second stage businesses. Phimation works with leaders to find and develop untapped potential in great businesses. Dave's

approach centers on "ROI with heart," emphasizing good business decisions while honoring each company's culture and relationships. His clients are often multi-generational family businesses, or businesses that operate in a similar fashion.

Dave graduated from Yale with an American Studies degree and spent a year after graduation biking around the country. Nowadays, his time outside work is filled with 3 teens, "beer league" hockey, and a blossoming karaoke career.



Jenna Spencer

Founder & Visionary – AssistPro

Jenna Spencer is a Delegation Expert. She loves connecting with people, and helping them learn new ways to delegate so they can focus on their area of expertise. She is the Founder and Visionary of **AssistPro™**, an executive assistant matching and

delegation coaching service created to free up time and create growth for busy leaders. Since founding AssistPro in 2014, Jenna has worked with hundreds of clients, helping them find the “Right-Fit Assistant™” and teaching them how to delegate and develop their assistants into leaders, as well. AssistPro has grown more than 50% each year since its founding – and has led to her creation and launch of an extension of the company devoted to helping entrepreneurs and small business owners on the path to Delegation Mastery.

When she’s not working, Jenna loves to travel, play tennis, and read great books while sipping coffee. She lives with her husband and children on their 20-acre “hobby” farm.



Kevin Walter

Coach – Great Game of Business

Kevin Walter, **Great Game of Business** (GGOB) coach and practitioner, is best known in the Chicago area as principal for the corporate catering and event planning Tasty Catering. He was a founding partner of this family business with such honors as a Forbes

Best Small Company in America, Caterer of the Year, Top Small Workplaces, Best Places to Work and Psychologically Healthiest Workplace in the nation.

Kevin has found that, over four decades, the most employee engagement and business success that he has experienced occurred while practicing open book management. This led to a passion for coaching the principles of The Game with other organizations across the world. Now, Kevin is a highly sought-after GGOB coach and speaker. Kevin was also inducted to the Chicago Entrepreneurship Hall of Fame.

When he’s not working, Kevin loves to escape to Arizona in the winter for some golf time with his wife, Andrea. Having two daughters of his own and being the youngest of 11 kids, it’s safe to say Kevin is a family man!

Tales of Transition

The Small Giants Community is filled with so many fabulous transition stories. And because we couldn't get them all on stage, we decided to share a few more examples of personal and professional transitions here. We hope that you find them valuable and can continue to learn from the leaders in our Community beyond our two days together. If you see any of these leaders at the Summit, feel free to say *hi* and ask them about their story!

From Managing Numbers to People

Torey Carter-Conneen

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Have you ever heard the saying that an only child makes a great leader? Us either, but Torey is proving it to be true! Torey Carter-Conneen is the CEO at American Society of Landscape Architects. He credits part of his leadership success with his upbringing, and his desire to interact with people from a young age, while also paying close attention to rules due to being the sole focus of his mother.

Torey began his leadership journey early on, with a natural inclination towards people, problem-solving, and organizing. He started his career working on the back-end of business as a bookkeeper, and studied to be an auditor. But soon enough he was recognized for his character traits as being leadership qualities, and worked his way up from the more mechanical side of business to the problem-solving and people side.

"It made me much better at explaining my value add and also bringing other people in."

Prior to his current role, Torey worked for the American Immigration Lawyers Association, the Center for American Progress, and the Victory Fund and Institute. While these may seem like very different organizations at a glance, at their core, they are all working towards improving lives. Even before he had the language to recognize it, they had a values alignment that he was able to carry from one organization to the next. He said he's able to speak about them almost interchangeably, because of their mission-driven focus.

"It's about having the ambition to make the world a better place for a variety of communities," says Torey. "There's work to be done across a myriad of organizations."

Even though Torey had some natural abilities as a leader, he wanted to grow himself even further. When he went through the Small Giants Leadership Academy and became more involved with the Small Giants Community, it helped him to recognize the aspects of his leadership identity that were working, and where he could improve. It also gave him the language to discuss elements of a purpose-driven business he hadn't had before.

"It made me much better at explaining my value add and also bringing other people in."

Torey enjoys the role he plays within his current organization, and how he can play his part in improving landscapes for people and promoting sustainable design to protect the planet from the impacts of climate change. No matter what team he's a part of, he's learned to keep his desire to help people at the forefront.

"It's not always going to feel like you're fulfilling your purpose, but hold on to what inspires you to be a purpose-driven leader and continue to fine tune that and follow it," says Torey. "Let that be your north star."

Teaching an Old Dog New Tricks

Kevin Elliott

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Sometimes, our knee-jerk reaction to resisting change is to make excuses. But Kevin Elliott, Co-Founder and Producer of Wewa Films, pushes past those excuses. He's repeatedly reinvented his career, even at an age that some would consider "too old" to transition into a totally new industry.

At 41 years old, he accidentally became a video producer.

Having caught the entrepreneurial bug at a young age, Kevin had owned businesses since he was 25 in a number of industries but, at 36 years old, decided to go to grad school and transition into the corporate world. He wanted a break from business ownership, thinking that being a cog in someone else's machine would be an easier route.

By the time he was 41 and had a family and a mortgage, part of his corporate job was producing educational videos. He had never touched video production before, but he learned that he liked it. Loved it, actually.

Then he met Courtney Gaskin. Along with his corporate job, Kevin was also an adjunct professor. Courtney took his public speaking class, and he discovered along the way that she was a savant when it came to creating artistic videos.

Fast forward two years, Courtney graduated and got deeper into her video production, and Kevin was still grinding his corporate gig. He was on a task force for a local non-profit that was looking to create a video about school attendance. Seeing this as a way to exercise his new passion, Kevin leapt at the opportunity to lead the project, and looped Courtney in to help.

This pro-bono project was the first inkling that he could turn his love for video production into a business. But he was 45 at this point. **Isn't that too late to start a business?** He was in "mid career." Shouldn't he be looking for security and a safe harbor? Aren't entrepreneurial triumphs and business risks supposed to happen in your 20s? It sure looked like it on social media.

But eventually, Kevin's entrepreneurial genes kicked back in, and he and Courtney decided to combine his producing and business skills with her artistic eye. With that, Wewa Films was born.

Kevin still has moments of self-doubt, if he made the right decision for himself and his family. But ultimately, Wewa Films is doing well, creating beautiful impact films. And he gets to show up every day doing something that he once thought would remain only a dream: owning and running a creative business.

Kevin made the scary transition of starting over to pursue a newfound purpose at a time in life when most are trying to shift into neutral. He's glad he did so, and he hopes that sharing his story may embolden others to do the same.

You've Got a Friend

Bridget Falco & Lance Shipp

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Bridget Falco loved her team at Evergreen Industrial Batteries, but working at a 14-person company within a male-dominated industry, she wanted a fresh perspective to help her develop as a leader. When she first inquired about being matched with a mentor through the Small Giants Sounding Board program, she wanted to be matched with a female leader.

***Change is inevitable,
but growth is a choice.***

Instead, she got Lance Shipp. She was skeptical that he was the right fit, but open to giving the relationship a chance.

Lance and Bridget's mentor-mentee relationship came at just the right time for Bridget. She was adding operational responsibilities to her sales role and was seeking to better understand overall corporate strategy, improve her financial acumen, and learn how to build and manage high performing multifunctional teams. Nine months later she also learned her company was going through its own change; the owner of the company was thinking about his own transition and ownership role in a thoughtful way. He was able to find a larger company that felt like a good culture fit, and in October 2022, Evergreen Industrial Batteries was sold and became part of Alpine Power Systems. For Bridget, this meant being involved in a confidential due diligence process and ensuring her teams continued to be informed and perform during this disruptive event.

More change was in store for Bridget when the former CEO of Evergreen (who became General Manager within the new company), announced he'd be moving to Europe and stepping away. This meant that Bridget would take over his general manager responsibilities (she chose to keep her title of Director, however). So not only did the past couple years bring on a change in culture and processes for Bridget, but also a new role with more leadership responsibilities in a much larger organization.

Even though the acquisition has been a positive experience, Bridget admits to struggling at times with the growing pains. She was initially defensive when questioned about her team's operations, and she acknowledges that her reaction came from a place of insecurity. But she's learned how to combat imposter syndrome, and is growing into her position amongst the larger company.

She credits having Lance as a mentor as a big factor in multi-transition success. Lance's strength as a mentor is being able to listen without judgment and separate out the emotions from the challenges, while providing perspective and examples of similar experiences. Depending on what is needed, he lends a sympathetic ear to hear her frustrations, is a teacher equipping her with new tools, resources and methodologies that apply to her particular situation, and pushes and encourages her as a coach. Despite her initial hesitation, Bridget quickly grew to appreciate how well matched the two were. Lance agrees, sharing that Bridget has been a good sounding board to him in return. They both share a passion for continued learning and the two see themselves as friends now and appreciate the support they're able to provide each other amidst various life and work transitions. Growth almost always occurs when we are uncomfortable. Change is inevitable, but growth is a choice.

From writing about business to being in business

Loren Feldman

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Loren Feldman has been writing and editing stories about entrepreneurs for decades. But he was never a business owner himself. Bucking against his track record for sound, stable decisions, Loren chose a global pandemic as the time to throw caution to the wind and step into the entrepreneurial space.

Ever since high school, Loren enjoyed writing. He wrote for his high school newspaper, and even though he didn't plan on building a writing and editing career – he received a BS in economics from the Wharton School of Business at the University of Pennsylvania – it was what he was good at, and he found a clear path into it.

Even though he had a degree in business, Loren didn't begin to understand entrepreneurship until his journalism career took him to Inc., The New York Times and Forbes, where he began building relationships with business owners and writers like Bo Burlingham. Compelled by their stories of passion, grit, and ingenuity but also sensing that they had been failed by big media companies that don't really understand what it takes to build a business, he saw an opportunity to build a community of business owners. Unfortunately, the big publications didn't see the same opportunity and prioritized more lucrative initiatives.

Loren had been turning over in his head the idea of creating his own business for years. He contemplated what it would look like and who would be involved, but he had a name picked out: 21 Hats. After some false starts and working with partners, it wasn't until the Covid-19 pandemic that he jumped in feet first and moved forward with the business on his own.

Now, **21 Hats is becoming the business he had dreamed of for years**: a daily email newsletter, a weekly podcast, and a monthly peer group offer various opportunities for business owners to share insights and lessons learned with each other. His mission is not to tell leaders how to run their companies, but rather to provide a space for them to build community and share their unique perspectives.

Even though he wrote about entrepreneurship and business owners for years, Loren admits that there are plenty of things he's trying to figure out—like pricing, for one example. And while his entrepreneurial education is far from finished, he's enjoying this new adventure of being on the other side of the page.

Finding Prosperity in Purpose

Mackey McNeill

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One of the biggest days of Mackey McNeill's professional life was in 2004, when she fired her largest client, shrinking her business by a third. At that same time, she doubled down on purpose and put another third of the business up for sale. Despite being a single mother with no fallback, Mackey took a leap of faith, knowing that purpose would carry her through.

Mackey's passion for financials stems from her childhood, and witnessing her father go bankrupt as an entrepreneur. When she heard that accounting is the language of business, she wanted to be fluent, and so became a CPA to help business owners thrive and prosper. And she did so, by building up her business, Mackey Advisors, over 20 years of hard work, but she was given pause when confronted with the aforementioned client.

***couldn't business be
about more than profit?***

Over the years, she's seen a common playbook among her clients: work hard, grow sales, and the bottom line will follow. But she's also witnessed that this strategy is not as guaranteed as many may think, and that it comes at the cost of those players' relationships and wellbeing. Which got Mackey thinking: couldn't business be about more than profit?

Through years of asking this question, conducting research, and working with clients, Mackey discovered two major obstacles for many business owners. The first is entrenched habits of making decisions based on gut instinct, or even worse, bad data. The second is a disconnect of all the different systems that make up the whole when it comes to running the finances of a business.

To combat these obstacles, and address her question of finding greater purpose in business, Mackey created her own playbook, *the Prosperity Playbook*. It took nearly 14 years to perfect, but Mackey feels she's come up with a strategy for purpose-driven leaders to follow that will allow them to make smart, data-driven business decisions to strengthen their financial security, all while having the time to enjoy life. And as part of the playbook, she created Prosper for Business, a framework that supports the decision-making process for a healthy business by focusing on the Three Freedoms of Prosperity: Money, Time, and Mind.

Mackey says that her journey has been a wild and crazy ride. But she wouldn't change it. Because, through honing in on her own purpose and business, she's been able to positively impact the lives of business owners. And when they're lives are improved, the ripple effect of impact widens to their teams, families, and communities.

As for that client Mackey fired; he ended up going beyond messing with funny money, and was eventually sentenced to 25 years in jail for fraud. Mackey's instincts about him were correct, and by transitioning her business away from clients who did not add to the purpose of the company, she was able to move closer towards her own purpose. She has also taken countless steps towards transitioning her business into a community of purposeful people all wanting to make a positive impact. Backed by good data, and values-aligned colleagues and clients, she's been able to prosper in business and in life.

Brewing a Legacy

Wynne Odell & Eric Smith

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Every founder eventually faces the dilemma of what to do with their business once they're ready to step away. There are plenty of routes to take, but what about in industries that are growing more competitive by the day? To answer this question, we look to Odell Brewing in Fort Collins, CO.

In 1989, Wynne Odell, her husband Doug and his sister Corkie all founded the brewery together, when there were only about 200 breweries in the country. Now, there are up to 9,000.

***"I couldn't ask
for a better legacy
to leave behind."***

According to Eric Smith, CEO of Odell Brewing, the beer industry looks a lot different than when the brewery was founded over 30 years ago. Many brands that would be considered craft, such as Lagunitas, Goose Island, and New Belgium, have been bought out by the bigger brands (think Heineken, Anheuser-Busch and Kirin) over the years. Despite the temptation of selling to a much larger competitor, Odell Brewing is one of few that has remained independent.

This Colorado brewery has maintained their cultural integrity throughout decades of industry shifts and struggles, and they have done so in part because of their employee-owned structure.

It started in 2013, when the three original founders, the Odells, began looking towards an exit plan. As they thought about what they wanted the company to look like moving forward, Wynne Odell says that they came up with three tenets to drive them forward: they wanted to maintain the cultural legacy, they wanted to do so by putting the company in the hands of the people who helped build it, and they wanted to do so in a financially savvy way.

With a clear goal in mind, the Odells looked towards employee ownership, and looped in three of their top managers who had been with the company for years, and who would be taking the reins from the founders. These managers were Eric Smith, Brendan McGivney, and Chris Banks, who would go on to become the CEO, the COO, and the CFO, respectively.

But rather than just a standard ESOP, the three successors stepped up and wanted to buy their shares outright. They agreed upon a plan in which the three would have a decade to complete the sale, but they had to start by putting in their own investment up front.

They're still in the midst of the sale plan, but on the right path, as well as having successfully implemented the ESOP. And in their maturing industry, having an employee ownership component is helpful in attracting the right talent who are dedicated to that purpose-driven culture.

The Odells could have sold their brewery to one of the major beer companies in the country and walked away with well-lined pockets. But they didn't, because for them, it was never about the money. It was always about the people, and it can continue to be so for years to come.

"I couldn't ask for a better legacy to leave behind," says Wynne Odell.



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