

# CEO Performance Roundtable Program for Contractors



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**PERFORMANCE**  
ROUNDTABLES

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# Why CEO Roundtables?

## THINK ABOUT IT . . .

- ▶ I use blueprints, plans, and specifications for all work, but I don't have a blueprint for the future of my company. What do I do?
- ▶ I'd like to see a point where I can slow down and enjoy life more, but I'm working harder and the demands on me are greater than ever before! How do I create more time for the things I want to do and still be sure my business is healthy and profitable?
- ▶ I review the performance of my employees, but no one reviews me. How do I know if I'm doing a good job as a manager, leader, and business owner?
- ▶ What are the truly important things that I need to know and focus on in order to make my business more profitable and successful?



# CEO Roundtables . . . What are they?

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The CEO Roundtable is a gathering of 7-10 CEOs where, with the assistance of professional facilitators, non-competing leaders can openly review their companies and share information in a focused effort to build breakthrough success for themselves, their families, their employees, and their customers.



# CEO Roundtable Mission

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To help contractors improve their businesses with the goals of making more money in less time with fewer headaches and higher quality of life.

# How does it work?

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- ▶ Roundtable members are assigned to peer groups matched in terms of company size and non-competition guidelines
- ▶ Roundtable groups meet at rotating host company sites two times per year for 2.5 days of peer review, learning and sharing
- ▶ There are usually 7-10 companies represented in each peer group; some companies have two or more executives enrolled in the program



# Why become a member?

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## WHAT'S IN IT FOR ME?

- **Best Practices in:**
  - Employee recruitment, hiring, and retention
  - Business development
  - Developing and delivering winning presentations
  - Design and implementation of incentive/reward systems
  - Leadership development for yourself and future leaders
  - Project management and execution

# Why become a member?

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## WHAT'S IN IT FOR ME?

- **Best Practices in:**
  - *continued* -
  - Ownership succession
  - Management succession
  - Strategic planning
  - Work in process
  - Tax minimization
  - Improving safety results and lowering worker comp costs



# Why become a member?

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## WHAT'S IN IT FOR ME?

- **Best Practices in:**
  - *continued* -
  - Quality control
  - Scheduling and on time performance
  - Growing your company successfully
  - Profit controls
  - Utilizing available technologies
  - Travel strategies





# Why become a member?

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## WHAT'S IN IT FOR ME?

- **Best Practices in:**
  - *continued* -
  - Better contractual relationships
  - Project planning and project launch
  - Preconstruction and estimating processes
  - Safety
  - Building a strong culture



# Why become a member?

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## WHAT'S IN IT FOR ME?

- **Benchmarking your organization against like companies for:**
  - Returns on management employees
  - Effective management and field structure
  - G & A costs
  - Investment returns on free cash
  - Proper company capitalization
  - Return on sales, assets, and equity

# Why become a member?

## WHAT'S IN IT FOR ME?

- **Benchmarking your organization against like companies for:**
  - *continued* -
  - Employee compensation
  - Employee performance
  - Employee benefit programs
  - Banking costs
  - IT spending and investment
  - Equipment utilization

Over time, your Performance Roundtable group will review every aspect of your business!



# Why become a member?

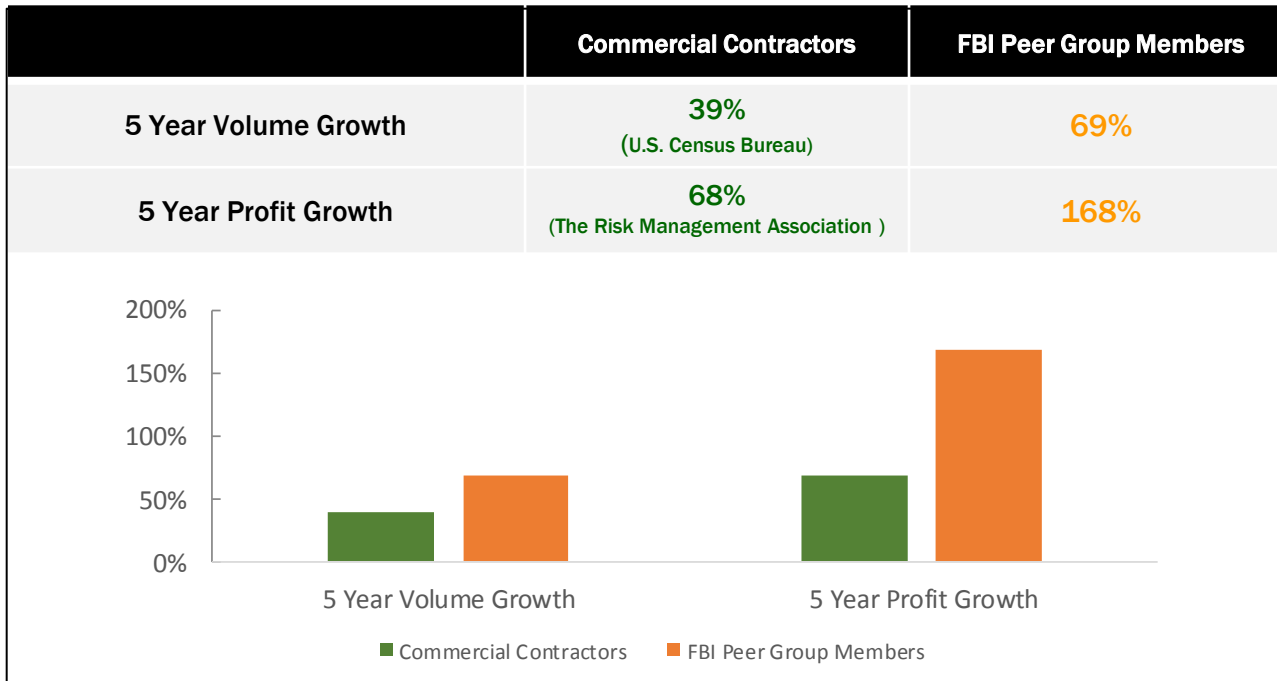
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## BY THE NUMBERS:

- 98%** ➔ Members who say the program is “money well spent”
- 96%** ➔ Members who renew their membership annually
- 95%** ➔ Facilitator approval ratings
- 2.5 x** ➔ Member profit growth v. industry over the last five years

# Why become a member?

Growth Comparison as of 12-31-17



The PRELIMINARY numbers for 2018 show growth of an additional 11% in volume and 14% in profits



\* Unless otherwise specified, the figures and statistics contained herein are produced by FBI using data compiled from FBI's Performance Roundtable Program

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INSTITUTE

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**PERFORMANCE**  
ROUNDTABLES

# Roundtable Member Commitments

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## TIME:

- 2.5 days per session two times per year
- Travel time

## MONEY:

- \$9,500 per year (only an additional \$750 for second company participant)

***If, in your opinion, the Roundtable does not pay for itself many times over within the first year of participation, we will refund 100% of your membership fee.***

# Roundtable Member Commitments

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## INTANGIBLES:

- Enthusiastic participation, mandatory attendance, a desire to change and improve and an open mind are essential to your success.

**For more information on how to become a member, contact:**

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*On January 9, 2017, Travelers purchased The Family Business Institute family which includes the CEO Performance Roundtable program. Travelers recognizes that the peer group model is a terrific delivery system for building better contractors, and they believe many of their commercial customers can benefit from the program. Having said that, the majority of members of the CEO Performance Roundtable are NOT Travelers customers, and FBI does not share verbal or written data collected on individual peer group members.*