

ANNUAL CONFERENCE 2016

Employee Ownership Clinic Appointments

We are excited to announce a new addition to the EOA's Annual Conference.

On **Monday 21 November from 15.15 to 16.15** delegates can book 15-minute one to one appointments with our expert exhibitors - members of the EOA who can or provide services or advice that can enhance your business.

You can book one or more session in subjects including law, engagement, marketing and IT. See below for our list of exhibitors, the subjects they cover and booking details.

Bookings must be made directly with the exhibitors and not through the EOA

Our exhibitors and booking details:

3BM

- **Marketing:**
Our marketing department specialises in all aspects of digital advertising. From website design and build, right through to thorough and advanced reporting and technical SEO techniques.
- **Health and Safety Compliance Management:**
A 3-tier health and safety compliance management offer which can ensure you have the peace of mind that your facilities remain compliant with health and safety legislation whilst allowing you to concentrate on your core business.
- **IT Support:** That includes a business hours help desk, remote access support, secure off site back up, rapid response onsite support visits, IT Network Design, enterprise Wireless Solutions, consultation advice on latest IT solutions.
Experts in all aspects of IT, we provide a consultation service to help you understand the latest innovations in IT e.g. virtualisation, cloud services and mobile device management.

Contact: **Samantha Relf**

sam.relf@3bm.co.uk

0207 6058350

Alterity

- Specialist in the fast, efficient development and implementation of strategy
- Bringing together technology and people to create the best knowledge base for decisions
- Engaging team members at all levels in strategy making without disrupting hierarchy
- Encouraging creative, innovative solutions, not just what's worked before
- Demystifying strategy and giving people a reason to believe in it

Contact: **Sandy Wilson**
sandy@alterity-ltd.com
07515 865 464

Baxendale

Baxendale has over fifteen years of experience helping and supporting employee owned businesses or businesses thinking about employee ownership with all aspect of ownership, governance, transition or culture issues. This can include:

- Legal questions
- Tax questions
- Accounting questions
- Best practice / options for embedding a successful employee ownership culture

Contact: info@baxendale.co.uk

Capital for Colleagues

- Focuses exclusively on Advising, Investing in and support the Growth of Employee Owned Businesses.
- Advice on becoming an Employee Owned Business (EOB) or growing your EOBs, particularly where capital and employee ownership cultural development is sought.
- Investing our patient capital in the form of equity and debt to either enable the initial transition to an EOB or to help grow the business. Actively supporting the EOB business Growth through sector or industry experts, as well as long term help to develop their employee ownership culture.
- With over 15 investee companies in our portfolio, C4C is well placed to support existing and future Employee Owned Businesses.

Contact: **Peter Matthews**
Peter.Matthews@capitalforcolleagues.com
07500822199

ESP Projects

ESP Projects Ltd is an IT services and web design company, based in Sheffield, with a national reach. Founded in 2002 as a social enterprise, our clients were initially in the local charity and voluntary sector, but in recent years the company has grown quickly and we now service clients across many sectors including manufacturing, finance, healthcare and education. Our services:

- IT support – ESP specialises in unlimited IT support, from service desk to engineer visits, with no hidden extras.
- Web design – we work closely with our clients and as standard offer to redesign up to 3 times. We offer expertise in a range of CMS, and our team includes programmers as well as designers.
- VOIP – We offer a range of onsite and hosted solutions, with flexible and high value (including all-inclusive) call packages.
- Branding – ESP recently acquired Branding by Tonik. Our already strong web design offer is now bolstered with expertise in branding across a range of media.

Contact: **Nick Roscoe**

nick.roscoe@espprojects.co.uk

07464544211

Fieldfisher LLP

- Fieldfisher is a full service law firm with a long history of providing friendly and practical advice to clients on changing and refreshing how business can be done.
- We have the UK's longest established specialist employee ownership practice. We will guide you proactively on the design, tax, trust, corporate and other aspects of creating and sustaining EO solutions for businesses of all sizes and in all sectors (read about some of our recent transactions [here](#)).
- We have helped develop the UK's range of direct, trust and hybrid EO structures including the EOT and pioneered the development of public service mutuals and other employee-led mutual structures.
- We would be delighted to answer any questions you have about employee ownership, whether they be about the transition to employee ownership, developing mature employee-owned businesses, individual share ownership, public service mutuals or anything else.

You can book an appointment with Graeme Nuttall OBE, Neil Palmer or any of our experts.

Contact: **Tom Martin**

tom.martin@fieldfisher.com

020 7861 4303

Fred

Fred Marketing is a full service agency and member of the EOA. We have delivered the communications strategy around EO Day for three years, and now work closely with the EOA as their retained PR agency. With an in-depth knowledge of your sector, we are here to offer you help and advice on how to make the most of your EO status.

- A commercially focused group of marketing, PR, design, communications and digital experts
- We deliver innovative, relevant, high quality marketing that actually gets results
- Talk to the team for advice on all aspects of your internal and external communications
- From strategy through to delivery – we think before we do, track our activity and deliver results
- Let us work with you on your brand profile, whether you need to build your client-base, create a bigger digital footprint or increase sales

Contact: **Emma Pearson-Kendall**

emma@fredquarters.co.uk

07554013334

Great Game

- Our approach to running a company was developed to help close one of the biggest gaps in business: the gap between managers and employees. We call our open-book management approach The Great Game of Business.
- What lies at the heart of The Game is a very simple proposition: The best, most efficient, most profitable way to operate a business is to give everybody in the company a voice in saying how the company is run and a stake in the financial outcome, good or bad.
- Our ultimate goal is to create a “business of business people” who think, act and feel like owners.
- So we teach people about business and give employees the knowledge and tools that help them understand how to play the great game of business and win!
- “The whole concept of The Great Game of Business is beautiful –consistency, alignment, and transparency, infused with core values and brought to life with powerful mechanisms. It is inspired and inspiring.” Jim Collins

Contact: **Arend Whelmers**

arend@greatgameuk.com

0117 9063424

J Gadd Associates

JGA are experts in supporting organisations to lever the advantage of employee ownership.

We recognise that for some owners and leaders, transitioning into, and embedding co-ownership can be both exciting and at times, a little daunting. We have a range of services which compliment the 'practical' legal and financial advice you will have sought:

- Transition and communication planning
- EO Leadership and Management Development
- Design, creation and implementation of EO representative bodies
- EO ownership engagement health check
- Facilitating great meetings and creating an Employee Ownership culture

Contact: **Jeremy Gadd**

jeremy@jgaddassociates.co.uk

07712 121 779

Pivotal Moment

Pivotal Moment Transitions Supports Leaders and Organisations to:

- Move from 'I-Centric' to 'We-Centric' Leadership, Interactions and Culture using Conversational Intelligence® from the Creating WE Institute
- Identify and resolve hierarchical and 'power' issues using 3 Dimensional Mapping processes; fast, intuitive and highly cost effective for sustainable, culture-appropriate solutions
- Develop leaders through establishing co-owner accountability partnerships for individual managers' and leaders' growth and increased effectiveness (Marshall Goldsmith Stakeholder Centred Coaching – a 'No Growth, No Fee' guarantee available)
- Build trust, engagement and loyalty internally and externally (e.g. customer relationships) using the neuroscience of leadership, hierarchy and interaction
- Build leadership and team self-awareness and capability through psychometric assessment applied to the day-to-day running of a profitable business
- Mindfulness programmes for leader and organisational resilience

Contact **Claire James**

claire.james@pivotal-moment.co.uk

0203 239 1334

Postlethwaites

What we do:

- A law firm specialising in employee ownership, we can help your business become employee-owned
- Tell us what you want to achieve and we'll map out how you can do that and what's involved on the journey
- If you decide to move to employee ownership, we'll then develop a more detailed plan and look after the legal and tax issues to implement it
- We'll demystify the process and ensure that you, your management and employees clearly understand what's involved
- We are employee-owned so you can also benefit from our own experience!

Contact: **Robert Postlethwaite**

rmp@postlethwaiteco.com

020 3818 9420.

Surveylab

Surveylab helps organisations to:

- understand – and act on – employee feedback and customer research
- Our survey design, hosting and reporting includes expert guidance throughout the survey 'lifecycle'
- Our Employee Survey Framework informs action planning, highlights areas of excellence and where focus is needed
- Simple, effective reporting tools aid feeding back results to staff and departments quickly – enabling your organisation to work on next steps, 'not the survey'
- Meet us at the EOA Conference in November

Contact: **Dan Wardle**

hello@surveylab.co.uk

020 3137 9423

TLT Solicitors

- Supporting businesses in analysing which type of succession planning structure is most appropriate;
- Providing project management support on the transition to an employee owned business;
- In-depth understanding and advice on all tax and legal aspects of moving to employee ownership (whether direct or indirect);
- Detailed experience of the legal and governance issues surrounding running an EO business once the transition is complete;
- Complementary services such as the provision of financial modelling and understanding of the accounting implications.

Contact: **Charlotte Warren**

charlotte.warren@TLTsolicitors.com

Unity Trust Bank

What we offer:

- Ethical provider of specialist operational banking services.
- A refreshing alternative to High Street Banking providers.
- Bespoke and structured loan funding available between £150k and £5m for a range of project types.
- Knowledgeable and accessible local Relationship Managers.
- Excellent standards of customer services and operational delivery.

Contact: **Lee Jagger**

Lee.jagger@unity.co.uk

07711 412865

Wise Group

- Fund Management – we run three funds, each with a different focus and style, in which you can invest, either through Wise or an alternative advisor.
- Financial Planning – our financial planners provide regulated, tailored advice on a range of areas, including pensions, investments, inheritance tax and financial protection to suit your needs and objectives.
- Portfolio Management – our financial planners manage your investment portfolio to suit your needs, which means we are not restricted to using our own funds, but can select the most appropriate investments for you.
- Building Relationships – we believe that, in order to give you this best possible service and advice, we need to get to know you. For that reason we believe it is important to build a long term professional relationship, not sell products.
- Work with our communities – our local community, the Employee Ownership community, and our company community all play a part in supporting us and providing us with opportunities to continue being successful, and we believe it is important to be an active part of those communities in return.

Contact: **Alex Rae**

alex@wiseinvestment.co.uk

01608 646 738

Wrigleys

We are a law firm specialising in trusts and employee and family owned companies, providing advice on majority and minority employee ownership since the late 1980s. We offer:

- For the family business owner – advice on succession and transition to employee ownership, including personal tax advice, as well as advice on financial structuring of transition with employee shares and loans, and external finance providers.
- For directors and management – advice on commercial and not-for-profit structures and documents and cultural transition of businesses, including public sector businesses, into employee ownership.
- For employees – advice and training on their role as employee trustee directors, as a member of an employee council or employee director.
- For the employee trust - provision of an independent trustee director and preparation of trust accounts and trust tax returns for the employee trust.

Contact: **Malcom Lynch**

malcolm.lynch@wrigleys.co.uk

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