

Welcome to

Employee Ownership Association Annual Conference 2017

Where employee ownership meets

CONFERENCE SPONSOR

Capital
for
Colleagues 

Advice Investment Growth

The Journey to becoming Employee Owned & Growing an Employee Owned Business

Facilitated by:

Chris Heald, Telos Partners

Contributors:

Exhibitors

Conference Sponsor

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Desired outcomes

- Participants appreciate that there are lots of good people here (exhibitors and fellow participants)
 - It is fine to talk to them
- Participants appreciate the range of materials available at the Conference
 - There is a lot here....
- Participants get a picture of the overall journey to Employee Ownership
 - They will get a flavour to help them focus for future sessions
 - Areas to explore; people to talk to
- Participant learn new things that can be applied in their own organisations
 - With particular focus on exploiting the opportunities for accelerating growth in an EO business
- Participants experience a stimulating and interactive session which models an EO ethos
- People establish contacts, which can be used in follow-up
- We have fun!

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Flow

- 5 mins – Introductory remarks, outcomes for session, flow, introductions – Chris
- 5 mins – Buzz groups with neighbours
 - Highlight needs and common ground
- 3 x 15 mins – sessions
- 5 mins – Closing remarks, thanks – Chris

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Areas to cover

The Journey to becoming Employee Owned

- Legal – including tax – **Robert Postlethwaite – Postlethwaite & Co**
- Financial – **Garry Karch & Sarah Anderson - RM2**
- Leadership & Management – behaviours – **Jeremy Gadd – J Gadd Associates**
- Transition – especially for the founder owner – **Nadeem Azhar & Ewan Hall – Baxendale**
- A recent story + the investment implications & opportunities – **Alex Rae – Wise Investment**

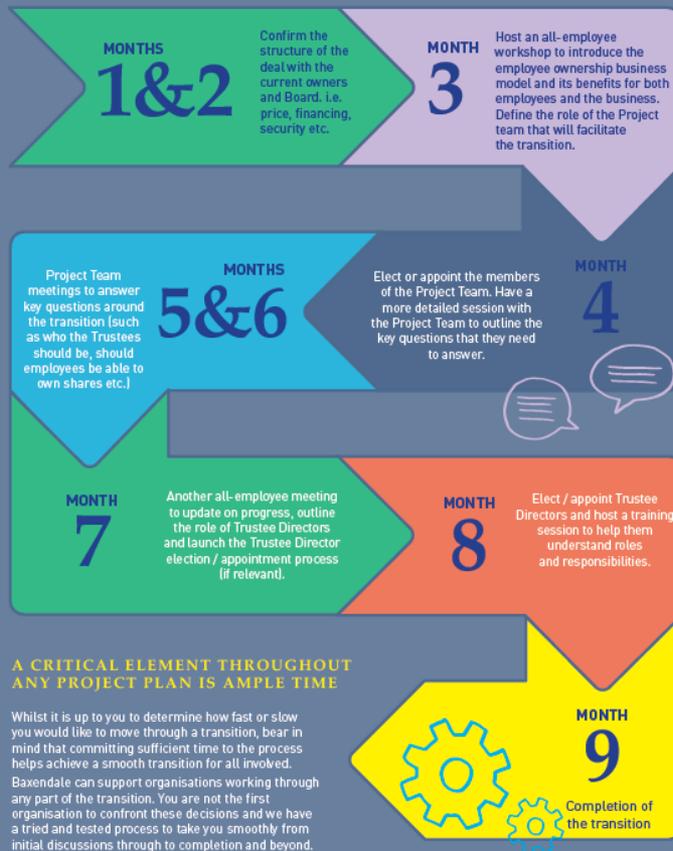
Growing an Employee Owned Business

- Funding growth – **Peter Matthews – Capital for Colleagues**
- Strategic development and business planning in EO businesses – **Sandy Wilson – Alterity**
- Utilising employee engagement for accelerating growth – **Kevin Garrett – Social Facilitators**
- Evolving the leadership style to maximise EO impact – **Claire James – Pivotal Moments**

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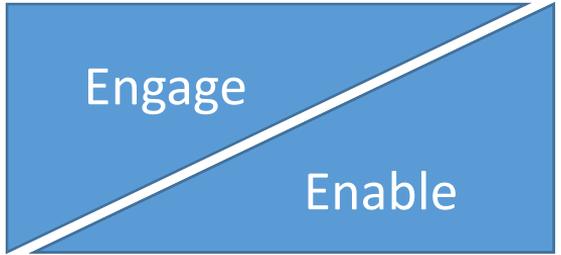
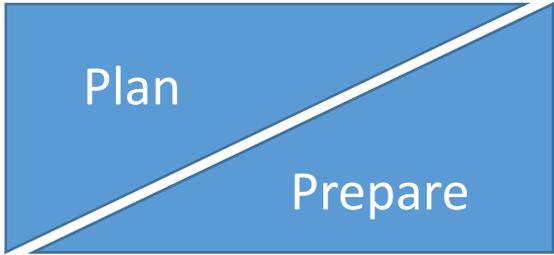
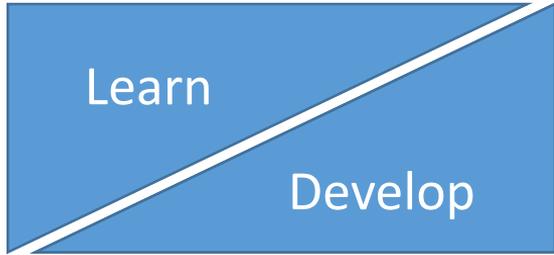
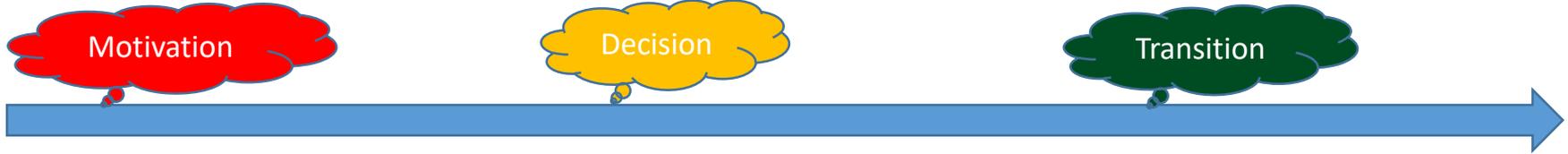
CREATING A PROJECT PLAN FOR THE TRANSITION IS ESSENTIAL

Your project plan can be extremely flexible, and will depend on your organisation's specific needs. We set out a sample plan below:



A CRITICAL ELEMENT THROUGHOUT ANY PROJECT PLAN IS AMPLE TIME

Whilst it is up to you to determine how fast or slow you would like to move through a transition, bear in mind that committing sufficient time to the process helps achieve a smooth transition for all involved. Baxendale can support organisations working through any part of the transition. You are not the first organisation to confront these decisions and we have a tried and tested process to take you smoothly from initial discussions through to completion and beyond.



Investigate-
Why now?
What are the options?
Impact on stakeholders?

Create project team-
What changes?
Is the business ready?
Who will be affected?

Launch-
Communicate the decision
Create the new structure
Equip all to become co-owners

Thank you. Enjoy the rest of the
conference

Now stay in here for a refreshment break

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