

TAB Level Up Business Conference

Presented by The Alternative Board of Central New Jersey

Grow Your Business Today & Plan Your Future For Tomorrow

June 1, 2023 • 8:00am - 4:30pm

DoubleTree by Hilton • 390 Forsgate Drive • Monroe Township, NJ 08831

Keynote Speakers



Scott Martin

Chief Investment Officer of
Kingsview Wealth Management
*"Pivot & Prepare: Economic Trends
and Your Business"*



Dave "Mr. Accountability" Anderson

President & CEO of LearnToLead
*"Overcoming the Six Temptations
of Successful Organizations"*

Registration Opening Soon

Improve Your Business

Take Advantage of Expertise from Proven Business Leaders



Improve Your Business



Elevate Your Leadership



Plan Your Future

Leaders from various industries will share their knowledge and expertise on business topics impacting small business owners.

- Economic Trends That Will Impact Your Business
- Unlocking the Possibilities of Generative AI
- Boost Efficiency with Accessible Technology Tools
- Next Level Leadership: Can You Survive Success?
- Secure Your Future: Planning for a Successful Exit

Unlock New Opportunities with Real World Advice

Morning Session | 8:30am to Noon

KEYNOTE: Scott Martin, Chief Investment Officer of Kingsview Asset Management – “Pivot & Prepare: Economic Trends & Your Business”

Business owners always look for creative ways to set their businesses apart from the competition. While it can be tempting to focus efforts on immediately recognizable areas, such as marketing and product development, there's another area that should be top of mind: economic trends.

Understanding changes in consumer behavior, spending patterns, interest rates, and other market forces over time—and how they interact with each other— helps business owners make more informed decisions about areas like pricing strategy and risk management that are essential for keeping up with the competition.

Scott will share his view on noteworthy economic trends now visible on the horizon so you can better understand their implications for your business initiatives. He will also provide his sought-after knowledge of lagging, coincident, and leading indicators and how they shape the economic landscape.

HARNESSING THE POWER OF TECHNOLOGY FOR YOUR BUSINESS

Session One: Boost Efficiency with Accessible Technology Tools

No matter the size or type of business, one thing unites all successful entrepreneurs: efficiency. Staying ahead in the ever-changing market can be challenging, but having access to up-to-date technology tools is key. From organizing critical business processes to streamlining communication between departments, you can implement a range of practical solutions today to help boost productivity and gain an edge over competitors.

Session Two: A Look at the Future Tech Curve: Understanding Generative AI

The tech industry constantly evolves, with cutting-edge tools and technologies launching daily. As small business owners, it's essential to remain informed on how these changes impact business operations – now and into the future. This session dives into technology developments coming down the pipeline, including artificial intelligence (AI) and chatbot technology (Chat GPT). Learn why these emerging trends could significantly affect communication between customers and employees, as well as insights on how you can prepare for them today.

Afternoon Session | 1pm to 4:30pm

SECURE YOUR FUTURE: PLANNING A SUCCESSFUL BUSINESS EXIT

For many small business owners, planning an exit strategy can be intimidating. After all, you've poured your heart and soul into your business for so long - why worry about winding things down?

Thinking about selling or passing on a business isn't always easy, but an effective exit plan is essential for securing peace of mind and financial security. It's never too early to plan and contemplate how you will eventually transfer business ownership; a solid exit strategy is imperative whether you choose to sell, scale for a potential acquisition, or prepare for family succession.

John Poppe, the co-founder of a middle market M&A firm, and Melissa Skrocki, a senior attorney with vast M&A experience will join a panel discussion of TAB members who have successfully sold their businesses. These seasoned veterans will share their insights, lessons learned, and what any business owner can do today to maximize their exit in the future. Questions encouraged!

John D. Poppe Jr., Co-Founding Partner, MidCap Advisors

Melissa V. Skrocki, Shareholder of Giordano, Halleran & Ciesla

Rakesh Kabra, Former Owner and Founder of Cosmolex

Glenn Morreale, Former Owner and Founder of C&M Automotive

Tracy Martin, Former Owner and Founder of Martin Insurance

Dan Surtz, Former Owner and Founder of Fusion Employer Services

Unlock New Opportunities with Real World Advice

Continued: Afternoon Session | 1pm to 4:30pm

SECURE YOUR FUTURE: PLANNING A SUCCESSFUL BUSINESS EXIT

KEYNOTE: Dave Anderson, President & CEO, LearnToLead –

“Overcoming the Six Temptations of Successful Organizations”

Increasing one’s success after becoming successful is often more challenging than achieving success in the first place.

When leaders think they’ve reached success, they begin to coast but remember, you can only coast downhill. When a leader thinks they’ve climbed a mountain and “arrived,” they unconsciously decide to build a fence around what they have rather than keep climbing. Their mentality shifts their business from a growth to a maintenance mindset and they often trade in innovation for optimization.

CAN YOU SURVIVE SUCCESS?

You certainly can and will if you are aware of, and work to overcome the six temptations of successful people and organizations. Dave "Mr. Accountability" Anderson is a leading international speaker and author on personal and corporate performance improvement.

A Ticket to Success

The Alternative Board of Central New Jersey invites current TAB members, business partners, and interested business owners to attend this full-day event packed with industry expertise, networking opportunities, and proven strategies to help you manage your business at every stage. Tickets for the full-day conference are \$250.

Registration Opening Soon