



LEADING MOVERS GROUP

Management Growth Institute (MGI) will invite eight to ten owners of successful moving companies to join the Leading Movers Group (LMG). MGI will select members who meet the criteria for membership established by MGI, and in assembling the group balance the dynamics of members and considerations of competition.

The group meets two times a year. Meetings follow a critique format or subject focus format where the group members choose the subject.

Criteria for Leading Movers Group Members

- CEO of a successful business.
- CEO has industry recognition as a leader – measured by business growth, profit, innovative products, van line leadership, industry leadership.
- The business generates \$20 million in annual revenue or more.
- The business operates in multiple locations.

Each group will consist of eight to ten members. MGI will form a waiting list when the LMG is full.

Group Directors

MGI will assign two directors to the LMG to give members the benefits of two functional areas of expertise, points of view, techniques and experiences.

Benefits of Membership

- Critique and subject focused meetings.
- Comparative measures to benchmark the business.
- Development of contacts with other leading movers.
- Visit by an MGI director before a scheduled critique.
- Top management assessments.
- Peer feedback on strategic decisions.
- Presentations by experts.
- Telephone consultation and conferences.

Two Types of Meetings for the Leading Movers Group

Meetings for the Leading Movers Group will be either critique-based or subject-based. Each has a different schedule.

MGI selects a meeting hotel with appropriate amenities for the meetings.

Sample Meeting Schedule – Critique Format

Critique-based meetings follow a format similar to Profit Enhancement Group meetings developed by MGI. MGI has modified the format to address the requirements and interests of larger companies.

The format of the critique-based meeting includes a visit by an MGI director to the host's locations to gather information, an analysis

of the information by the directors who then assemble and distribute preparatory materials for the visiting members to acquaint them with the business and its critical issues.

The critique focuses on broad, long-range issues such as: strategic planning, succession, sustainable growth, mergers and acquisitions.

- One month prior to the meeting – An MGI director will visit the host to prepare for the critique.
- Wednesday AM – The two MGI directors are available for individual consultation, or enjoy an optional social event (golf/local visit/outing).
- Wednesday PM – The directors present a review of the benchmarks, and introduce the host business.
- Wednesday Evening – The directors and the group gather for an informal dinner and a presentation by a speaker such as a local expert on a topic of mutual interest (college professor, business leader, innovative mover).
- Thursday – The group makes a site visit and gathers data.
- Thursday Evening – The critique is prepared by the group and updates are shared.
- Friday AM – The critique is presented to the host CEO.
- Friday Lunch/Afternoon – Conclusions are drawn from the critique; later a roundtable discussion addresses such topics at joint purchasing opportunities, a vendor presentation, group planning, or an industry update.
- Friday late afternoon – Visiting group members depart.

Sample Meeting Schedule - Subject Focus

A meeting devoted to a specific subject will follow a similar schedule, replacing the critique activities on Wednesday PM, Thursday and Friday with content related to a chosen topic. Content will include presentations and work sessions where members will apply ideas to their own businesses.

- The group chooses the subject for the meeting, and the MGI directors design an agenda to address the subject.
- Sample topics: Information technology, administration, operations, legal issues, strategic planning, leadership development.
- Presenters include: group members, MGI resources and outside experts.
- Members may bring high level managers interested in the topic.

Benchmarks and Antitrust Considerations

The LMG will choose a set of operational measures at its initial meeting. To avoid anti-trust concerns, the group will choose measures of processes and practices. These measures, with clear definitions, allow members to target inefficient areas of the business and drive improvements. Members will provide company updates to MGI before meetings for individual company review and group review at the meetings.

MGI will monitor all meeting content to steer the group away from areas that would arouse antitrust law concerns.



LEADING MOVERS GROUP (LMG) APPLICATION

Date _____

Name _____ Title _____

Company _____

Address _____ City/State/Zip _____

Phone _____ Fax _____

Email _____ Web site _____

Revenue (last full year) _____ Number of employees _____

Number of locations _____ List of Locations _____

Accounting Software _____

Sales Software _____

Operations Software _____

Other Software _____

Products _____

Markets _____

Competitors _____

Key People (name, title/function) _____

Signature _____

Program Responsibilities:

Confidentiality: LMG members sign a confidentiality agreement at the first meeting. This agreement allows members to build trust in the group, a vital ingredient for an LMG.

Attendance: Consistent attendance builds a strong group.

Program Cost:

The annual dues of \$8000 cover two meetings, yearly benchmark comparisons, interim communications with directors, and outside speakers. Members pay \$2500 and director travel expenses when their company is critiqued. Members pay their own travel costs and shared expenses for the meetings. Shared expenses include: directors' travel, meeting room and equipment rental, and meals. MGI bills all members for shared expenses after each meeting.

Include a \$2000 deposit with this application and send to:

Management Growth Institute
27 Chelmsford Road
Rochester, NY 14618

Upon placement in a group, MGI bills for the remaining dues.

For questions: call – 585-461-1353, or email – kbalbertini@managementgrowth.com