

2017 Innovation Symposium:  
*From Success to Significance —  
How Entrepreneurs Can Maximize Their Exit*



**June 12-13, 2017**  
Harvard University  
Cambridge, Massachusetts



## 2017 Innovation Symposium: **From Success to Significance** How Entrepreneurs Can Maximize Their Exit

Entrepreneurs and family business owners at some point face the critical decision of whether, when and how to exit their business. A strategic approach is needed to ensure that the process runs smoothly and brings the maximum return on investment.

This means carefully preparing to sell, understanding your key business drivers, and properly marketing your company to strategic buyers.

The 2017 Innovation Symposium, **From Success to Significance — How Entrepreneurs Can Maximize Their Exit**, will provide an opportunity for you to learn and craft a perfect exit strategy. Business experts will share best practices and there will be plenty of opportunities to network with like-minded private business owners. This unique program has been designed so participants leave with a solid understanding of how to effectively plan a business sale and how to maximize the value of your business in a global marketplace.

- How do you know when the timing is right to sell your business?
- What can you do to make your company more attractive to potential buyers/investors?
- Are there different strategies you should employ when positioning with national vs international buyers and strategic vs financial investors?
- How do you get your business in front of the most qualified and strategically interested buyers?



This executive educational symposium will answer these questions and cover the many strategic decisions involved in any exit strategy and deal process. This includes:

- Proactively determining the optimum timing of an exit.
- Understanding the strategic and competitive drivers of your business that will maximize its value in the eyes of investors.
- Surrounding yourself with the right professionals who will have your best interests in mind.
- Planning for and navigating the various steps of the business deal.
- Reaching your personal aspirations as you transform your business success into personal victory.
- Looking back on the experience and knowing you made the right decisions.

The 2017 Innovation Symposium will be held at Harvard University in Cambridge, MA, providing participants with a unique opportunity to learn from world-class authors, speakers and experts in areas such as life planning, private wealth management, financial strategies, divestitures, mergers and acquisitions.

The two-day program is structured with interactive sessions that use Harvard's case study method where participants learn from real life examples and work with peers to solve problems. This format is complemented by in-depth discussions with business owners who will share their own personal experiences, best practices, and the challenges they have faced when exiting. With plenty of networking and socializing opportunities, the two-day program will be an immersive experience that allows you to learn as well as connect with like-minded business professionals.

The 2017 Innovation Symposium is an exclusive invitation-only program. Owners or controlling shareholders of mid-market private businesses, across all industry sectors. Registration for this event is US \$2,400 (\$1,995 if you register by May 1, 2017). Travel and hotel expenses are the responsibility of individual participants. Attendance for this exclusive event is limited, so we encourage you to apply as soon as possible.

Learn more about the Symposium and apply to attend at:  
<http://theinnovatorsforum.org/2017-maximizing-your-exit>

## Sunday, June 11

**6:00 – 8:00 PM**

*Welcome Reception for the 2017 Innovation Symposium*  
(Hors d'oeuvres with Drinks)  
Registration Available

## Monday, June 12

**8:00 – 8:45 AM**

### **Energizers: Coffee and Conversation**

Registration Available

**8:45 – 9:00 AM**

### **Welcome and Introduction – Maximizing Your Exit**

Overview of the symposium and its goals. This introductory session will frame the Symposium and identify key themes and ideas for exploration.

*Introduction by:* David S. Ricketts

**9:00 – 10:00 AM**

### **Scaling Up to Exit**

Verne Harnish

**10:00 – 10:45 AM**

### **Transforming Business Success into Personal Significance**

Rob Follows

**10:30–11:00 AM**

### **BREAK**

**11:00 – 12:00 PM**

### **What to Expect When You Sell Your Company and Walk Away**

Jimmy Calano

12:00 – 1:00 PM

**LUNCH** - Small Group Conversation

1:00 – 1:45 PM

**The Exiting Process**

John Ratliff

1:45 – 2:15 PM

**FreeScale Your Business for Maximum Value in Exit. A Framework**

Richard Manders

2:15 – 3:00 PM

**Exiting Case Studies**

3:00 – 3:30 PM

**BREAK**

3:30 – 4:00 PM

**Legacy, The Giving of Life's Greatest Treasures and a Life Worth Living**

Lloyd Reeb

4:00 – 4:45 PM

**Interactive Learning Perspective: Strategic Investor Mind Mapping**

Rob Follows

4:00 – 4:45 PM

*Optional: Guided Tour of Harvard, free time in Harvard Square*

6:00 PM

**COCKTAILS & DINNER**

**8:30 – 9:00 AM**

**Energizers: Coffee and Conversation**

**9:00 – 9:45 AM**

**Finish Big**

Bo Burlingham

**9:45 – 10:30 AM**

**The Great Game of Business**

Jack Stack

**10:30 – 10:45 AM**

**Work Out Session - Planning Your Exit**

**10:45–11:15 AM**

**BREAK**

**11:15 – 12:00 PM**

**Work Out Session - Planning Your Exit**

**12:00 – 1:00 PM**

**LUNCH** - Small Group Conversation

**1:00 – 1:45 PM**

**Work-Out Sessions: Reports and Findings**

**1:45 – 2:15 PM**

**Case in Point - The Decision to Exit**

John Ratliff

**2:15 – 2:45 PM**

**Panel – What’s Next**

Dr. David S. Ricketts

**2:45 – 3:00 PM**

**Wrap Up**

Dr. David S Ricketts



### **In collaboration with:**

**STS Capital Partners** (Success to Significance™ through Selling to Strategics) is an international, boutique mergers and acquisitions firm, specializing on sell-side consulting and providing advisory services to mid-market private businesses. STS helps entrepreneurs and family business owners transform their business success into personal significance - by maximizing value when selling to international strategic buyers. With a global team of 200+ M&A specialists, partners and industry advisors, STS has extensive global reach and access to strategic investors, and is committed to generating optimum results for clients. Learn more at [www.stscapital.com](http://www.stscapital.com).

### **Contact Information**

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