

# ENTERPRISE UNIVERSITY

Better your business knowledge. One course at a time.



WELCOME TO  
**ENTERPRISE  
UNIVERSITY**

PHOENIX | FALL 2019

# Come See What's New With Enterprise University!

Enterprise University classes challenge and energize attendees with thought-provoking material from presenters who live what they're teaching. Our workshop format ensures you leave with knowledge that can be put to use immediately in bettering yourself and your business.

We've made a few enhancements to make your experience with Enterprise University better than ever, including:

- Shorter, two-hour courses
- Faster kiosk check-in
- Designated time for you to network

As always, courses are offered at no cost to you—and you do not need to be a client of Enterprise Bank & Trust to attend. You can sign up for one course, or as many courses as you'd like.

By attending a course, you become one of more than 18,000 professionals who have participated in Enterprise University since launching in 2003. Join our network by registering today. We look forward to seeing you this fall.

# INFORMATION: **LOCATION & SCHEDULE**

## REGISTRATION

Enterprise University classes are offered at no cost. To register for one or more classes, please visit [enterprisebank.com/eu](https://enterprisebank.com/eu).

Certificates of attendance are available upon request.

## All classes will be held at the **Arizona Small Business Association**

11811 N Tatum Boulevard  
Suite P-120  
Phoenix, AZ 85028



## All classes begin at 8:30 a.m. and conclude by 10:30 a.m.

Check-in and continental breakfast begin at 8:00 a.m.

### SEPTEMBER

25 The Brand Called “YOU” p. [11](#)

---

### OCTOBER

1 Using Instagram™ to Promote Your Business p. [12](#)

---

9 Take Control of Your Health Care Spend p. [7](#)

---

16 Leading and Communicating with Style p. [9](#)

---

22 Tap into Your Growth Potential p. [10](#)

---

30 Succession and Exit Planning p. [10](#)

---

31 The Technology Pre-Nup: Protecting Your Intellectual Property When Working With Others p. [14](#)

---

### NOVEMBER

5 Maximizing Your LinkedIn™ Page for Business p. [12](#)

---

13 Principles to Create a Thriving Workplace p. [13](#)

---

19 The Right Entity, The Right Tax Strategy p. [8](#)

---

# AUDIENCES

We have included audience markers to help you identify which classes will best fit your needs. Look for these markers above each course description.

## BUSINESS AREA



ALL AREAS



BUSINESS LEADERS



FINANCE



HUMAN RESOURCES



INFORMATION TECHNOLOGY



MARKETING & SALES

## LEVEL



BEGINNER



INTERMEDIATE



EXPERT

FALL 2019  
**COURSE  
DESCRIPTIONS**

PHOENIX | ENTERPRISE UNIVERSITY

# COURSES: FINANCE



WED  
OCT  
09

TAKE CONTROL OF YOUR HEALTH  
CARE SPEND

**Byron Shultz**  
*Principal, MJ Insurance*

Do you need a solution to manage your company's health care spend? Attend this course and learn how to utilize data analytics to determine the most efficient way to transfer, mitigate, and prevent risk in your employee benefit program. *Attendees will receive exclusive results from business leader survey.*

- Discover how to make decisions backed by data
- Align your strategy with your business initiatives
- Learn how to mitigate and prevent future cost drivers





TUE  
**NOV**  
**19**

## THE RIGHT ENTITY, THE RIGHT TAX STRATEGY

**Jonathan Bengel**

*Certified Tax Coach, Certified Tax Planner, IRS  
Enrolled Agent, JB Financial LLC*

Learn the differences between a Corporation, LLC vs.  
S Corporation, and other tricky tax and legal lingo.

- Understand the legal protections for each entity type
- Comprehend the tax implications between each entity type
- Understand the funding of each type of entity

*I was able to take away many different tools to bring back to my company to plan for next year. I am excited to share what I learned with my team!*

# COURSES: MANAGEMENT & LEADERSHIP



WED  
OCT  
16

LEADING AND COMMUNICATING  
WITH STYLE

**Tracy Bullock**  
*President, Bullock Training & Development*

The ability to effectively relate, communicate, influence, and motivate others is a critical skill in creating successful business relationships.

- Learn how to modify your behavior based on other people's work styles
- Create best practices to achieve desired outcomes you expect from meetings
- Develop a toolkit to improve the effectiveness of every meeting you attend



TUE  
OCT  
22

## TAP INTO YOUR GROWTH POTENTIAL

**Carmen Payne**  
*Business Strategy Execution Specialist,*  
Champion Business Consulting

To achieve our potential we must grow. And growth doesn't just happen. We must have the right mindset, awareness, and be intentional about it. This course is designed to take a dive into growth from both a self-development and a teamwork perspective. If you want to be more effective at making growth a tangible target personally or collectively as a team, get ready to tap into your growth potential!

- Set growth intentions and clarify a 90-day growth goal
- Evaluate growth gaps and hindrances that keep you from growing and reaching your potential
- Review lessons learned and assess sense of urgency to design a progress pathway



WED  
OCT  
30

## SUCCESSION AND EXIT PLANNING

**Chris Brown**  
*VP of Business Development,* Montage  
Partners

You've built a successful business and are ready to move on, either to a new venture or to a well-deserved retirement. Now what? Join Montage Partners to learn how to plan the best exit for you and your company, how to execute that plan, and how to ensure the legacy you built continues after you've departed.

- Start planning your exit strategy early: it takes time to prepare
- Consider all of your options for selling or exiting your company
- Determine your top priorities for your exit

# COURSES: MARKETING



WED  
SEP  
25

THE BRAND CALLED “YOU”

**Tracy Bullock**

*President, Bullock Training & Development*

Building your personal brand is more than delivering goals with excellence. Learn the components of turning “high performance” into “high visibility.”

- Understand the components of your personal brand
- Learn what steps to take to build awareness in your company and the market
- Develop a personal branding strategy



TUE  
OCT  
01

## USING INSTAGRAM™ TO PROMOTE YOUR BUSINESS

**Jackie Ulmer**  
*Social Media and Sales Strategist, Street Smart Wealth*

Instagram™ is one of the fastest-growing social platforms and ripe with opportunity for entrepreneurs. You will learn strategic profile set up for maximum reach and engagement, how to build a content strategy, and implement it for success!

- Build a power profile to attract your ideal client
- Develop a hashtag strategy to capture a wider audience
- Create a strategic content plan to maximize your time and success on Instagram™



TUE  
NOV  
05

## MAXIMIZING YOUR LINKEDIN™ PAGE FOR BUSINESS

**Jackie Ulmer**  
*Social Media and Sales Strategist, Street Smart Wealth*

The LinkedIn™ professional networking website is the most under-utilized social platform, but is critical for a successful business-to-business sales strategy. Despite the platform's powerful reach in both search and social, most LinkedIn™ users are invisible and losing out on potential leads, business and sales every day. This class will teach you how to make the most of your profile and leverage your connections for increased sales.

- Learn the five strategic areas to focus on for your profile
- Discover how to your headline to appear in search results
- Develop an effective content strategy

# COURSE: **HUMAN RESOURCES**



WED  
**NOV**  
**13**

PRINCIPLES TO CREATE A  
THRIVING WORKPLACE

**Crystal Blackwell**  
*CEO/Owner, Crystal Clear Results Life  
Coaching*

The workplace climate can both positively and negatively affect staff performance and program outcomes. Creating and maintaining a positive working environment depends on the needs of your staff, the work you do, and the resources you have.

- Gain a new perspective on positive communication skills in the workplace
- Develop a thriving workplace climate that provides a sense of purpose
- Understand how to foster team spirit by focusing on strengths

# COURSE: TRENDING



THUR  
OCT  
31

THE TECHNOLOGY PRE-NUP:  
PROTECTING YOUR INTELLECTUAL  
PROPERTY WHEN WORKING  
WITH OTHERS

**Joseph (Joe) Walsh and Bryan Wheelock**  
*Principals, Harness Dickey*

In today's complex world, there will be a time that every successful business will need to work with outside companies to achieve its full potential. This course will focus on the best practices for protecting your intellectual property when that time comes.

- Negotiate effective confidentiality agreements, and recognize and deal with their limitations
- Use available intellectual property rights to protect your innovative ideas and market share
- Appropriately apportion ownership and control of jointly developed technology

To register online, visit [enterprisebank.com/eu](https://enterprisebank.com/eu).



Member FDIC