

SARATOGA BUSINESS REPORT

Q4
2023

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LOOKING AHEAD:

IT Trends for Businesses in 2024

WRITTEN BY ADNET TECHNOLOGIES



2024



2023

While there are some things that stay the same year after year, IT isn't one of them.

One of the things we love most about this industry is the constant evolution of tools, solutions, and technologies. What's going to have the biggest impact on IT for businesses in 2024? Here are ADNET's predictions, based on industry insights, our national network of partnerships, and global trends we're seeing - and tips for implementing them at your organization.

AI FOR BUSINESS

You've probably been hearing a lot about AI in the past year, and that's not likely to change in 2024. With tons of business applications being developed for the technology, it's poised to become an integral part of how organizations operate.

Businesses can already use AI in lots of different ways. Beyond ChatGPT, major corporations like Microsoft are investing substantial resources in the technology. These new AI applications are highly customizable and can be adapted to the unique needs of your business. They can help you generate or explain content, serve your customers, leverage search capabilities, and translate conversational language into code.

Most AI applications are available as a subscription model - some are even free. But as with any tool, "free" can be more of a warning sign than a draw. There's nothing wrong with using free tools, but make sure you're reading the full terms and conditions if you plan to. With the rise of new technologies comes new security risks. When incorporating AI into your business strategy, make sure you're doing it with privacy and security in mind and discussing it with your IT partner.



ENABLING WORK-FROM-ANYWHERE

In 2020 and the years that followed, there was a mass exodus when it came to working in offices. Now, there's a widespread push to return to a more traditional office environment. But ignoring the benefits of enabling your team to work from anywhere could be detrimental to your business. There's no right answer to whether you should allow your team to work from anywhere, but not offering it can hurt your business.

Flexibility not only helps with talent retention and recruitment, it also helps people stay productive regardless of common barriers. While some organizations are encouraging a more traditional office environment, many are embracing what enabling their teams to work from anywhere allows. Working remotely can give your employees more work-life balance, and ultimately lead to more productivity.



ADNET has had a work-from-anywhere policy in place for years and built our new office spaces with that in mind. We've seen the benefits with our team - people are more productive, focused, and happier - and our clients are too.

But at the end of the day, we need to prioritize security for the clients we serve. We wouldn't allow our team to work remotely without leveraging the proper security tools and an expertly implemented cloud environment.

Is your organization looking for ways to implement a work-from-anywhere policy? Our next tips for building secure cloud environments and pursuing digital transformation can help.

SECURE CLOUD ENVIRONMENTS

No matter where your team works, a secure cloud environment can benefit your business. In addition to not having to replace aging hardware every few years, empowering you and your team to securely access your business-critical data helps when the unexpected happens. In 2020, we were able to seamlessly pivot to working from home when we needed to - with no interruption to our ability to provide service to our clients, thanks to having a secure cloud environment in place.

Cloud has been gaining momentum for years now, but with major backers like Microsoft and Amazon, the technology and support have never been better. Small and large companies are transitioning to cloud instead of upgrading on-premise hardware. If you're not already leveraging the cloud, you're missing out.

Before making big hardware purchases this year, you might want to discuss cloud options with your IT partner. You could save money and end up with a more efficient, flexible solution.


DIGITAL TRANSFORMATION

Digital transformation encompasses many different things - but mostly it's about enabling your business to become more effective and efficient by using digital solutions and tools like AI, managed IT services, managed security services, application services, productivity training for your team, and more.

While it's not a single product or piece of technology, digital transformation is one of the biggest IT trends we anticipate for 2024. Businesses are looking to compete in a challenging economy, and digital transformation is a way to do that. Focusing on what your business needs to scale and shift quickly is imperative. Modernizing your technology, policies and process has a positive impact on your clients, team and business.

But don't get caught up in the buzzwords with these IT trends - make sure your IT partner is having real discussions about the business challenges these tools solve. Not every single solution is right for everyone, and that's okay. Making sure you have the right technologies and tools in place isn't necessarily trending, but it's the most important thing you can do. If you have questions about any of these technologies and if they're relevant to your business, or how you can leverage them as part of your strategy to meet your goals - reach out to a trusted IT partner and have the conversation. Implementing anything without a strategy and security in place can be a costly risk.

This is by no means a comprehensive list of new tools and technologies, but if you're looking to get ahead of the IT curve in 2024, it's a great place to start.

Need help implementing any of these technologies and tools, or want to learn more about how they can transform your business? Reach out to us at thinkADNET.com - we'd be happy to help. 

This is by no means a comprehensive list of new tools and technologies, but if you're looking to get ahead of the IT curve in 2024, it's a great place to start.



Marketing Isn't Magic

The Truth About Marketing and the Real Benefits You Can Expect



WRITTEN BY **HOPE RELLY-COBB**

There are a lot of marketing agencies that will promise you the moon, stars, and magical space unicorns, and then not deliver those stellar results they sold you on. But that's because marketing isn't magic – it's human. Good marketing takes the right framework and hard work.



At SIX Marketing, we're really focused on being responsible marketers. Marketing is an investment, and we owe it to our clients to set their expectations about the timeline and results. One of our core values is "be human," and that includes acknowledging we can't produce superhuman results.

By "marketing isn't magic," I mean three things:

1. It isn't easy
2. It won't fix things overnight
3. It's all about testing

This doesn't mean marketing isn't worth it. It just means that marketing takes more time, effort, trial and error, research, strategy, and patience than some would like you to believe.

And the irony is that the more time, effort, trial and error, research, strategy, and patience you put into marketing, the better the results will be. Treating marketing like it's magic doesn't produce the same great results. Marketing won't grow your business overnight, but good marketing will set you up for long-term success.

So, let's take a look at the truth about marketing and the real benefits you can expect from it.

WHAT TO EXPECT FROM A MARKETING AGENCY

Item #1: Marketing isn't easy.

Good marketing strategies come and go, and staying on top of all the best practices is hard. It forces us, as marketers, to be creative and constantly learning. We have to keep up with marketing trends, industry trends for our clients, and performance data. We're always pivoting. What is the audience responding to? What are the competitors doing? What is/isn't working? How has Google or Facebook changed the rules again?

One of our core values is “be human,” and that includes acknowledging we can’t produce superhuman results.

There’s a reason many businesses decide to outsource their marketing to an agency; it’s simply too much work for a small marketing department to handle on their own, especially when it comes to pivoting. It’s why clients often come to us with stagnant marketing strategies and growth. But marketing agencies can only do so much within their retainers.

One thing clients sometimes lack is visibility into all the minutiae that go into one campaign. There are many small steps that a marketing agency does by second nature, but that clients often aren’t aware of from the outside. For example, here are some of the things involved in getting a display ad up and running:

- Campaign strategy
- Funnel building (i.e. outlining how it fits into the customer’s journey)
- Ad copywriting
- Graphic design
- Landing page copywriting
- Landing page design/development and conversion optimization
- Ad targeting
- Ad campaign setup and launch

But on a marketing calendar, it might just say “Run display ad campaign.” These steps typically involve multiple team members who specialize in different types of marketing, such as writing, graphic design, web design, and pay-per-click (PPC) advertising. Just like with many things that look easy, it’s a complicated, collaborative effort that produces a fairly simple-looking result.

YOUR MARKETING PLAN’S TIMELINE

Item #2: Marketing doesn’t fix things overnight.

Marketing is a cumulative effort that gains momentum over time. This is often said about slow-roll tactics like search engine optimization (SEO), which takes time to implement and even more time to see results (thanks, Google!). But in reality, it applies to most marketing tactics.

When you start running ads, it takes some time to experiment and find the right language and targeting before you hit your stride. Content takes a while to research, draft, edit, optimize, and publish. Social takes a while to build your audience and increase engagement. Account-based marketing (ABM) involves a lot of moving parts that take a while to produce or set up.

Agencies have a leg up when it comes to getting things up and running, because we’re used to it and have a well-worn system. But we also don’t have an “on” switch we can hit when we onboard a new client. If a client is starting marketing for the first time (or starting over completely), it takes a few months to set up (or gain access to) systems, conduct research and audits, and build out content for campaigns.

The client can help expedite the process in some respects (like being diligent about getting us access to systems), but we always allow time for the onboarding process. For more comprehensive services, we conduct large research projects (or at least several audits) to understand our new client’s products/services, industry, market trends, competitors, previous marketing efforts, and areas for improvement. Conducting research and creating a comprehensive plan delays our official marketing launch, but in the long run, it makes our campaigns more informed and effective.

HOW DO YOU KNOW IF YOUR MARKETING STRATEGY IS WORKING?

Item #3: Marketing is all about testing.

I like to think of marketing as both an art and a science. There’s no one right solution for every company in any given situation. There are a lot of variables, so most campaigns, especially when we’re starting out with a new client, are experiments. We run the campaign we think will work best for their audience, and if they don’t respond, we change the messaging or change the medium or change the audience.

As I said before, there’s a lot of pivoting in marketing and the best practices, trends, and strategies are always evolving. The great thing about marketing, however, is there are so many different tactics to try if the first strategy we choose doesn’t pan out. We can always find the right way to reach your audience.

At SIX, we like to do research first to make sure we’re running the right campaigns on the right channels for the audience. But your audience is human, and sometimes, it takes trying a strategy to know whether they’ll respond to it.

If you don’t have any historical data to start with, it can be hard to know how well campaigns are performing when we’re starting out. As we try different approaches and run campaigns, we establish benchmarks that we can then use to gauge how your future campaigns perform.

MARKETING EXPECTATIONS VS. REALITY

Here's the thing: your expectations for marketing should always align with reality. If your expectations haven't been met in the past, it's likely that the potential outcomes weren't communicated to you properly.

Now, I'm not talking about quality here so much as results. If the creative was poorly designed or the content was badly written, then that's not a communication issue; that's simply bad quality.

But if you thought your marketing efforts were going to make the phone ring off the hook, skyrocket your website to the #1 spot in Google search results, or make you go viral on social media... then your agency hasn't been honest with you.

You know the old saying that you can lead a horse to water, but you can't make him drink? Marketing's job is to lead your prospects to your products or services and make them look as appealing as possible (within the bounds of honesty), but sometimes people just aren't ready to buy from you.

Eventually, as you build your brand's reputation, authority, and customer base, you will hopefully see those stellar results you've been dreaming about. But it takes time and ongoing effort to get there.

THE REAL BENEFITS OF MARKETING

Some types of marketing, like content and SEO, are known to be long games or "evergreen" tactics. They take time to implement, but the results are cumulative and will snowball over time.

In reality, all marketing is a long game. Sure, we can focus on Google Ads, display ads, and social ads and, assuming there aren't any technical issues, get them up and running pretty quickly. But rather than "set it and forget it" (treating marketing like it's magic), we prefer to optimize them over time, increase their performance, and change strategies as needed to produce better results.

Marketing as a whole has a cumulative effect, and the longer you focus on marketing, the better the return on your investment. Although it takes time, effort, and testing, it pays off if you keep working at it. Marketing is a game changer, but it doesn't turn the game on a dime. It changes the long-term outcome. It gives you different tools to use, and a better path forward to success.

That's why we're dedicated to clear communication and making sure your expectations align with reality. If you'd like to learn more about how we can help produce real results, visit our website at SIX.marketing to read about our approach or to schedule some time to discuss your business' unique needs with a member of our team. 🌐

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BUILD BETTER CULTURE: GUIDING LEADERS

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WRITTEN BY **MEGIN POTTER**

T

o reach the pinnacle of performance, define your company's culture, then rise to the challenge of changing it.

If you want your team to perform at its full potential, train your managers to become great leaders.

Having the ability to lead is not an innate talent, it's a set of skills built on a series of successful habits. While a company's culture originates from its leadership, every employee plays a part in defining it.

Having healthy company culture translates into high employee retention rates and a good reputation for delivering a quality product.

Improving company culture begins by defining it (which can be tricky) then changing it (which is even more challenging).

In 2020, local HR leader Tom Schin founded Build Better Culture to help leaders evaluate their company culture while also teaching them strategies to improve it.

GET CULTURED

Work culture impacts everything from the highest levels of decision-making to the atmosphere in the communal break room. Vibrant, energetic businesses have a company culture that inspires people to do their best work in engaging, nurturing, and collaborative environments.

According to Gallup analytics, 70% of a team's engagement depends on the manager. Teams with great managers see 27% higher revenues per employee.

Tom Schin refers to himself as an "Engagement Engineer" – a problem-solver and public speaker providing thoughtful, service-based solutions revolving around employee engagement that can have dramatic impacts on your business. With research-based methods informed by observations of practical applications, Schin teaches leaders how to have the critical conversations that move a company forward.

"I appreciate the uniqueness and individuality of humanity coupled with the diversity everyone brings to the table," he said.

RAISE THE BAR

Imagine the largest contingency of your company is 10% more productive. Now, imagine the exponential impact their efficiency could have on the rest of your workforce, explains Schin.

Build Better Culture provides high-quality, relevant information that facilitates connections. After graduating with a Bachelors of Arts degree in Anthropology and Psychology, in 2004 Schin earned his Masters in Curriculum Design from SUNY Albany.

With more than 15 years working in the recruiting and staffing industry (as well as creating curriculum through his company, Ask and Learn Instructional Design) Tom knows how to ask the right questions and how to get the answers you're looking for.

When working with your organization, the first thing Schin will ask is, "How open are you to change?"

There's a good reason he starts there. For organizations to effectively change, they first need to recognize any barriers that could prevent or jeopardize the transition. This includes discovering resistance to change at any level of the company, which is common and often goes unaddressed. Uncovering and tackling those obstacles helps ensure the desired adjustments and transformations are executed more effectively and, crucially, last longer as well.

ADAPT & ADJUST

Companies are constantly in flux, but as automation and remote work replace 20th century assembly line tactics, adults entering the workforce today are adapting to the change, says Schin.

"One of the things the pandemic allowed folks to do is to be more vocal about their needs. The leaders that adapted, and who continue to adapt, had an easier time bringing everyone to the table," he said.

Being a patient, lifelong learner yields better cultures.

"Change doesn't happen overnight. I can help reinforce concepts and be a facilitator while helping your company grow," acknowledges Schin. "Some folks have an easier time implementing leadership than others."

A FORMIDABLE FOE

Solving problems in the workplace means developing leadership strategies that consider all sides of a situation. With an experienced perspective, Schin's light-hearted nature

propels culture building forward.

"I provide knowledge and support to everyone, no matter where they are on the journey," he said. "By being observant to what works and what doesn't, you stay flexible today, and more at ease participating in that learning journey tomorrow."

When people are comfortable, they contribute, collaborate, and build better culture.

BE THE HERO

Guiding people on a learning journey to becoming their best selves (both personally and professionally), Build Better Culture emphasizes the importance of being true to oneself – and the confidence that instills to motivate people.

As the current Board President of the Capital Region Human Resource Association (CRHRA), the area's local SHRM (Society for Human Resources Management) affiliate, Tom is constantly sharing ideas and resources to help others.

To get to know more about Tom on a personal level, he and wife, Rhiannon, married since 2009, have three children in their early 20's, and a 16-year-old Labrador mix named Wyatt. Committed to CrossFit and the ukulele (which he'll sometimes bring along to Build Better Culture sessions), Tom also served on the Saratoga's Home-Made Theater Board for five years.

Although there are Star Wars posters hanging in his office, if he were a superhero, Tom says he'd be Batman.

"Batman lingers in the shadows and does good things," he says. Like the Dark Knight, Tom excels through determination and commitment to the cause, "...but I don't need a cape," he laughs. "Bruce Wayne helps people out of a desire and a hunger to make things right."

A mere mortal, Batman was motivated to push beyond his limitations and channel his strengths to achieve super heroic heights (he also had a lot of great gadgets to rely on).

Schin's point is there's a myth to be dispelled– the myth that you need superpowers (alien, radioactive, etc.) to achieve great things. That's simply not true. The Batman ethos embodies the fact that, armed with intellect and some terrific tools, we can all reach our greatest potential.

SHINE THE LIGHT

Interested in shaping your company culture but don't have Bruce Wayne bucks? Follow Tom Schin's LinkedIn Stream for free articles, advice, and updates on upcoming conferences.

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Meet the Rest of the Team!

Left: Carissa Conley
Right: Melinda Bucknam



MULTI-GENERATIONAL



ENTERPRISING ENTREPRENEURS:

Building The

Benson's Pet Center

WRITTEN BY **MEGIN POTTER** | PHOTOS PROVIDED

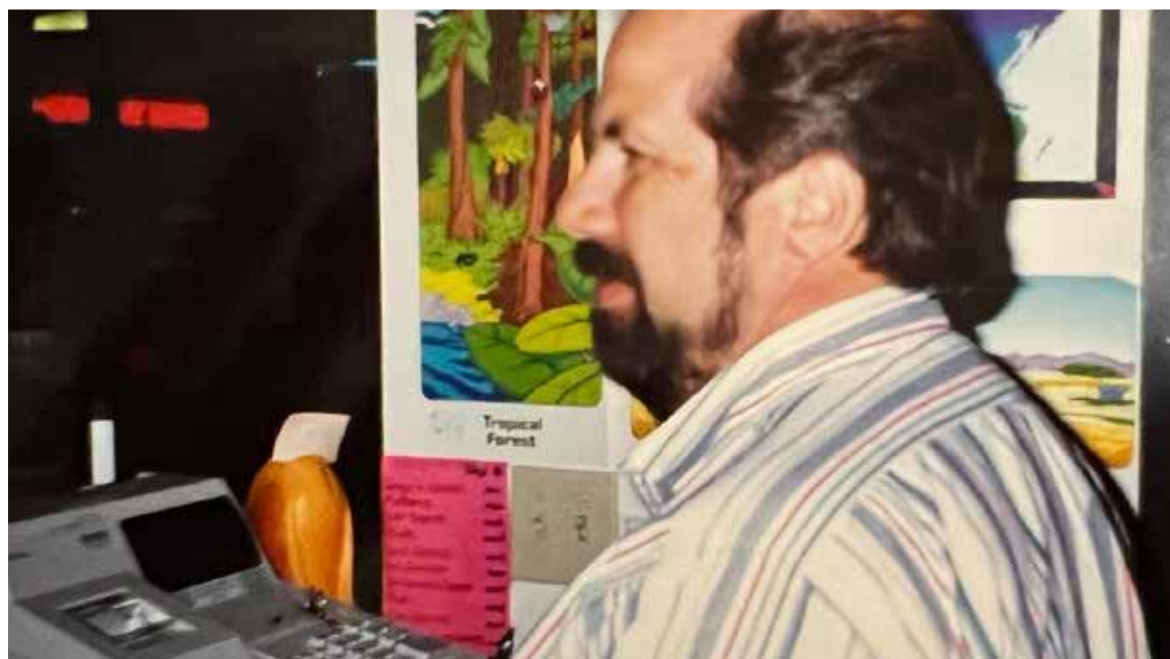
Family Bond



“

Our philosophy has always been to do the right thing. We have a reputation for being honest and knowledgeable. We give customers what they want.

– FRANK KRAMER



Pioneers in the pet supplies market upstate, the Benson’s Pet Center family is invested in doing the right thing while remaining committed to never taking themselves too seriously.

By his early 20s, Ryan Kramer had a room set aside in his apartment specifically to raise and breed different kinds of freshwater fish. One fateful day, Ryan wandered into Benson’s Pet Shop, in the old Saratoga Mall, and discovered that there was a section of the store dedicated to fish– but there was not a fish tank (with live fish) in sight. He struck up a conversation with the owner and was given the opportunity to start selling his fish in the pet store. His sales would grow quickly, and when his fish venture started making more money than the rest of the pet store, the original owner asked Ryan if he would like to purchase the business. In 1992, Ryan traded his baseball card collection to his father, Frank, for a few thousand dollars to put down on a loan to buy Benson’s Pet Shop. In October of 1992, Ryan officially became the new owner.

Several days after acquiring the business, the first of Ryan’s sons was born. Over the next 10 years, Ryan had two more sons, and became an uncle to several nieces and nephews. Today, they all work in various positions inside the business.

Family businesses are common in our community, but the commitment found in Benson’s personnel seems to be especially strong. Many of their 100+ employees have been with the company for 15 years or more, making Benson’s very unique in the demanding world of retail, and proving loyalty is a bond built on more than just blood.

By creating a culture based on connection, understanding, and empathy, Benson’s Pet Center has remained in-sync with their customers’ values while also expanding to areas not just in Saratoga, but in Clifton Park, Colonie, Johnstown, Rotterdam, and Pittsfield, Massachusetts. In 2019, Ryan opened up a fish-only store in Ballston Spa, called Benson’s Fish Room.





Family businesses like Benson's Pet Center are the heartbeat of our economy, but maintaining generational success and continued growth requires a unified strategy that protects both business and family relationships.

"Just because this is a family business doesn't mean business has to intertwine with the family," said David Kramer, Manager of their second Saratoga store. "We have a good time at work, then go home and have a good time as a family."

Hanging around Benson's since they were kids, Ryan Kramer Jr., David Kramer, Sam Kramer, and Frank Whalen grew up in the business. These 'Benson's Boys' laid the foundation for a philosophy of connection, and developed their love of animals, early on in life.

While daily operations in the store continue to include helping customers, stocking products, and caring for the animals, Sam Kramer said one of his favorite memories has to be playing video games with employees in the back room during their lunch breaks when he was a child. These personal interactions inspire a work environment that makes the employees feel like everyone is one big family.

Speaking of family, over the years Benson's has had many pet family members, including an assortment of dogs and cats, fish, lizards, snakes, birds, ferrets, hedgehogs, and even a tarantula. Before the pandemic, Ryan Sr. would bring his 4-foot python to school visits for presentations.

With all the joy pet ownership brings, Benson's knows there can be tougher moments as well. This past November, Ryan Sr.'s beloved dog, Dani, a 16-year-old pit bull mix, crossed the rainbow bridge. "Since she passed away, it feels like something is missing. There's a void in the house," he said. Many Benson's customers have been touched to receive a sympathy card after their furry companion passes on.

MAKING A DIFFERENCE BY GIVING BACK

Benson's Pet Center has thrived providing a huge variety of pet products and services for our furry, feathery, and scaly family members while also remaining devoted to their reputation for honesty and integrity.

In the mid 1990s, Benson's adopted a state-of-the-art computerized inventory control system utilizing point-of-sale interactions. Benson's inventiveness and ingenuity allowed them to excel beyond the competition and provide the excellent service their customers have come to expect. It also facilitated their growth on many fronts - since opening their Queensbury location 23 years ago, they have expanded the store twice, nearly doubling their square footage.







The role and reach of Benson's Pet Center goes well beyond their economic contributions to the community because they are also a family-based business that understands the importance of giving back.

Taking action every day to make a positive difference, their Benson's Cares, their 501c3 nonprofit organization, has raised over \$100,000 in the past two years for local organizations, including the North Shore Animal League, F.A.C.T (Feline Advocates Coming Together), the Lucky Puppy Rescue, and many others.

RICH REWARDS

The environment created at Benson's Pet Center is so welcoming that it inspires others to take action, as well.

While it's common for the customers who come into their nine locations to share stories of their pets, some are taking the care of animals to the next level. Vincent, a Clifton Park customer, started selling handmade items at the store to raise money to donate to local rescue shelters – when he was just 8 years old. Now, at age 13, he's still at it.

"People love it. We love it. It's a really good thing to see people who have the passion to get involved," said Ryan Jr.

Even those who no longer have pets of their own still return to Benson's. One customer comes in to buy treats just to hand out to customers in other stores that have their pets with them. This customer has a reserved shelf in the back of the store and has an official non-employee Benson's Pet Center nametag.

COMMITMENT TO PET WELLNESS AND COMMUNITY ENGAGEMENT

By ensuring the success of Benson's Pet Center today, this family business is guaranteeing that even more can be done for pets for years to come.

For more than a decade, Benson's Frequent Buyer and Benson's Best Loyalty programs (rewarding a \$10 discount with every 500 points customers accrue) have been rewarding savvy shoppers.

In addition to exclusive offers and rewards, Benson's holds adoption and pet care clinics, fundraisers for local rescues, and pet photo opportunities at all of their locations.

In 2022, Benson's gave a long-time employee, Jennifer Conklin, a hand in launching Benson's (now best-selling) Bestie Box and Kitty Crate monthly in-store non-subscription subscription boxes. "Pet food vendors and manufacturers have been lining





“
Just because
this is a family
business
doesn't mean
business has to
intertwine with
the family.”

– DAVID KRAMER

up to support this venture, which supplies customers with an affordable assortment of items for their dog or cat each month”, said Ryan Jr.

More recently, Benson's Pet Center launched their Golden Ticket Giveaway, where eight lucky winners could have a chance to find a golden ticket hidden in a Bestie Box or Kitty Crate. The winners get free boxes or crates for a year.

CONCLUSION

Benson's Pet Center is more than a pet supplies haven; it's a tale of passion, family, and a commitment to the community. From Ryan Kramer's fish-filled apartment to the bustling multi-location enterprise today, Benson's has not only grown as a business but has cultivated a familial atmosphere where employees and customers alike feel like cherished members of an extended family. The 'Benson's Boys,' raised within the business, have sown the seeds of a unique work environment, blending professionalism with the warmth of shared experiences.

But Benson's Pet Center goes beyond the register, exemplifying social responsibility through Benson's Cares. Programs like the Bestie Box, Kitty Crate, and the Benson's Best Loyalty Program are not just about pet supplies - they're a testament to Benson's dedication to strengthening the bond between pets and their owners. As the business continues to evolve, Benson's Pet Center stands as a beacon of compassion, creativity, and community engagement in the dynamic landscape of pet care, ensuring a lasting legacy of care and connection for furry, feathery, and scaly family members.

For more information, follow Benson's Pet Center on Facebook and Instagram, and visit [bensonspet.com](https://www.bensonspet.com). Stay connected to the heartwarming stories, innovative programs, and the latest updates from Benson's, where the love for pets extends beyond the shelves. 🐾

Serving Trees. Serving Country.

FOOTHILLS TREE SERVICE

Serving the local Saratoga, Albany, Schenectady, Washington, Warren, and Fulton counties for over 20 years, the men at FHTS are professional, experienced tree climbers, riggers, loggers and naturalists. Most known for their expertise in residential tree pruning and removals, the company finds their niche in performing these popular services in hard to access sites.



“

I think what sets Foothills Tree Service apart from other tree companies is my genuine appreciation and respect for trees.”

– VINCE WALSH, OWNER, FOOHILLS TREE SERVICE



WRITTEN BY **JORDAN DUNN** | PHOTOS PROVIDED

Trees first, business second. That's the motto at Foothills Tree Service (FHTS) according to owner Vince Walsh.

RESPECT FOR THE TREES

“I think what sets Foothills Tree Service apart from other tree companies is my genuine appreciation and respect for trees,” said Walsh.

Growing up as a local of Saratoga County, Walsh developed a love for the area very early on in life. After graduating from Saratoga High School in 1990, Walsh joined the Marine Corps and spent much of his time stationed

in Hawaii. During his time in the 50th state, Walsh developed a deep appreciation of the local culture and natural wildlife. Returning home after his completed tour, Walsh would find he had brought back with him a renewed sense of home and a craving for learning. Upon his return, he would enroll at Paul Smith's College in Paul Smiths, New York. While there working to complete a degree in Environmental Studies, Walsh befriended another enrollee, coincidentally also named





Paul, who was an arborist by trade.

"It kinda all started with my friend Paul actually," said Walsh. "After college, Paul had the basis of this business going, and I worked with him for a few years learning as much as I could. But when he made a move north to Canada to be with family, people started to turn to me as the expert," said Walsh.

Flash forward 20 years and people in the local community are still turning to Walsh and his team for expertise. With a focus mostly as production climbers (trees that are hard to access), Walsh grew his team over the years from just one to a strong and experienced team of six. Now, as he is looking to narrow the focus of the business, he is currently back down to a smaller crew and is focusing almost exclusively on specialty jobs within Saratoga County.

A FULL SCOPE SERVICE

In addition to his Environmental Studies degree, Walsh is a proud naturalist, and tries to ensure that when he spends time with his clients, he not only rehabilitates their landscape but educates them on it as well, sharing the naturalist perspective along the way.

"With over 25 years experience, my working knowledge of assessing tree health in specific locations is uncanny. I guide my customers to meet their needs while advocating for the trees themselves. I want them to truly understand the value of the trees in their own landscape," said Walsh.

In addition to the actual tree removal and the educating of his clients, Walsh also takes his efforts one step further through FHTS's sister company, Local Roots. Local Roots draws on permaculture principles to utilize pruned or removed trees, turning

them into useful materials to be sent back into the local economy and environment. Their list of products includes lumber, furniture, bowls, carvings, firewood, and mulch. It is Walsh's hope that in the years to come, this sister company will become an even more active entity in the local community.

A BALANCING ACT

Keeping a sustainable mindset in a world that doesn't always adhere to sustainable practices can be a challenge for those with even the purest of intentions. This certainly doesn't stop Walsh from trying though.

As Walsh explains, "Here at FHTS, we have been using biodegradable chain oil for the last 25 years or so. It may not sound that impactful but when you consider that it's at least 3-4 times more expensive than non biodegradable kinds that other companies use, it's a big expense to us financially but it's more than worth it when we consider it's the safety of the environment we're talking about."

In addition to the biodegradable oil, Walsh's company additionally focuses on things like keeping all of their equipment up to date and ensuring that the equipment they bring to a job is appropriate, and non-intrusive, to the local landscape. Being mindful of those types of details is just one more example of how FHTS hopes to keep as close to 'sustainable in practice' as possible.

CONNECT WITH FHTS

Foothills Tree Service is a fully insured practice. Those interested can call (518) 242-0618 for a free consultation or visit their website at foothillstreeservice.com. 📞



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mlb construction

Passing The Torch

WRITTEN BY **MIKE PIEKARSKI** | PHOTOS PROVIDED

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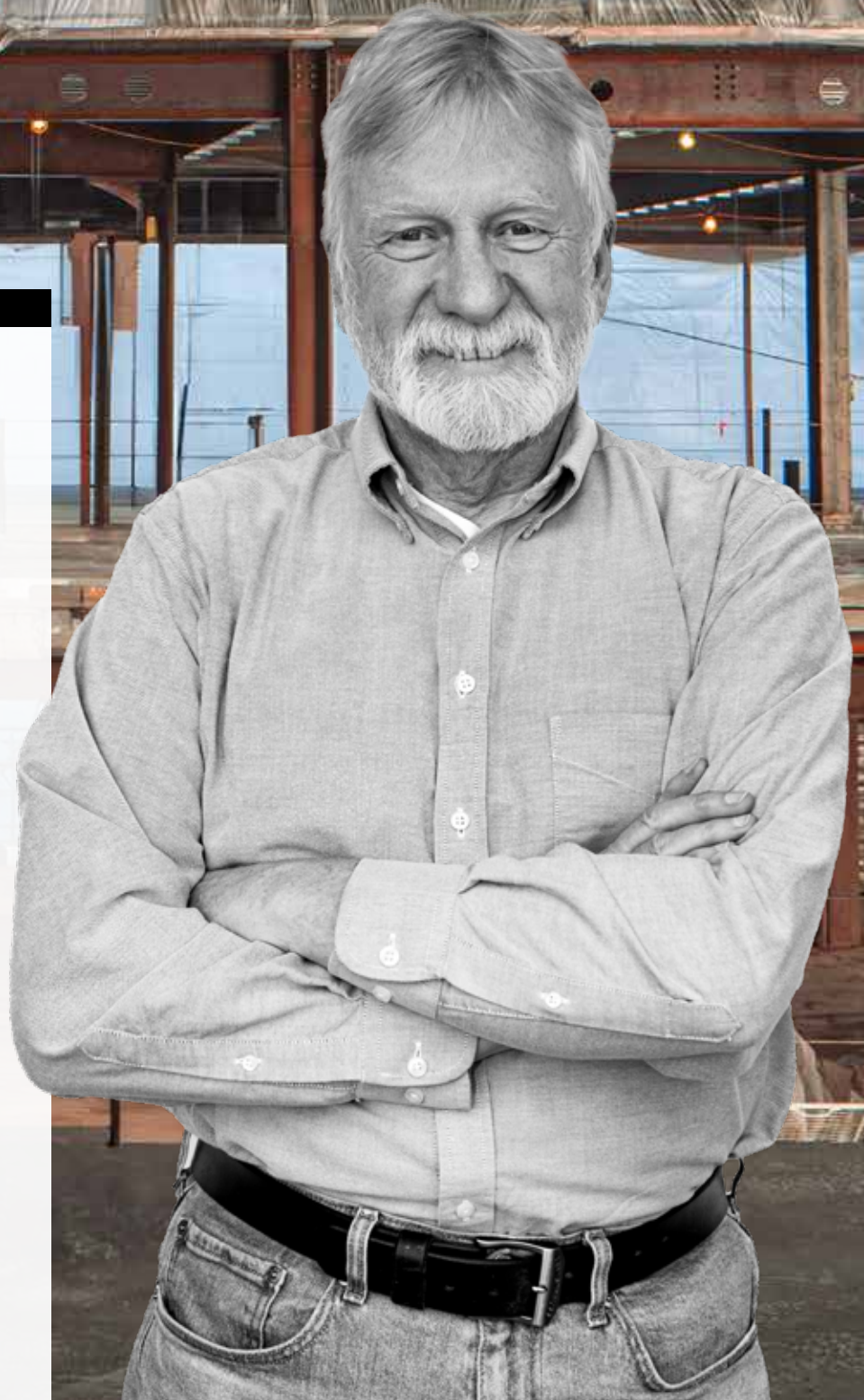
ransitions are not always easy. Whether in life, love, or business, change can be daunting, anxiety-inducing- and just plain hard. Sometimes, they work seamlessly; in other cases, they don't pan out at all.


For Malta-based MLB Construction Services, transitions have been crucial to its success. The company, ranked annually by Albany Business Review among the Top 10 contractors in the area, has now been in operation more than seven and a half decades and is, arguably, as strong as ever. It must, therefore, be doing something right.

After two successful leadership transitions (and one that did not work out so well), the Saratoga County construction mainstay is working on another one in order to propel it well beyond 2023 - its 76th year in existence - toward what it hopes will be its centennial in 2047.

"Since we did have two transitions that worked, it seemed to me, 'Let's see if we can try the same thing again,'" said MLB president Jim Dawsey, a 44-year employee, in a recent telephone interview. "The third time's the charm."

Pictured: Jim Dawsey, President, MLB Construction Services, LLC





Dawsey and executive vice president Scott Shepherd were part of the company's second successful leadership transition. That transition process took around seven years, beginning in 2002, 55 years after the company was founded as McManus, Longe & Brockwehl, Inc. That was back in 1947, when they were operating out of Albany.

"The original founders were real entrepreneurs," said Dawsey, 71, a Schenectady native and current Saratoga Springs resident. "They each had their own piece of the company and what they handled... One was the financial and marketing guy, John McManus; one was the operations guy, Fred Longe; and then the engineer was Don Brockwehl."

From a humble beginning in the attic of Longe's home, the three men slowly built up the company, whose name was changed to MLB Industries in the mid-1970s and then to MLB Construction during the Dawsey-Shepherd transition. From a handful of clients in the late 1940s, the original threesome created what is now a multimillion-dollar enterprise with over 100 employees.

"We've averaged way more than \$50 million a year" in gross billings on projects, said Dawsey, company president since 2009. In 2022, in fact, the company totaled \$92 million in gross billings and, since its inception, has done more than \$2 billion in construction volume.

When Dawsey and Shepherd step down from their jobs, they will turn over the company leadership to current Chief Financial Officer, Aleisha Campbell and the firm's two vice presidents, Brian Douglass and Jeff Lino.

"We're going to give these three enough training over the next five years that I should be able to be phased out by then," Dawsey said of the transition process that began early in 2023.

By all estimates, Campbell, Douglass, and Lino should take over a humming enterprise with plenty of clients. Thus far, in its three-quarters of a century, MLB has been extremely busy.

"We've done thousands of projects over the years," said Dawsey, who said he still enjoys going to work every day, typically arriving at 5 a.m.

"We've done 70 projects in Saratoga; we've done probably 150 in Albany," Dawsey added. "We've worked with Price Chopper since 1988, and we've probably done a hundred projects for them." With the Hannaford Brothers supermarket chain, Dawsey estimates that MLB has completed over 300 projects for them since they expanded into New York from Maine. That includes building stores not just here in New York but in New Hampshire, Vermont, North Carolina, Virginia, and Florida.



I'm really excited. I'm happy that we're still alive and kicking after 76 years and, hopefully, this next crew will bring us up to the 100-year level.

– JIM DAWSEY, PRESIDENT, MLB CONSTRUCTION SERVICES, LLC

Over the years, MLB has completed numerous projects in the fields of education (including work at RPI and Skidmore College), medical (such as the Nathan Littauer Hospital in Gloversville), housing (including redeveloping 41 properties in Schenectady and performing a work force project in Albany for lower- and middle-income residents, respectively), retail, and hospitality, among others. In addition to its Malta headquarters, MLB also has a branch in Apex, N.C.

Memorable projects include the nearly year-long 2019 construction of the 1863 Club at the Saratoga Race Course track; the Morocco pavilion at EPCOT in Walt Disney World in Florida in the early 1970s; the foundations for the GlobalFoundries facility in Malta in 2010, at which MLB poured 62,000 cubic yards of concrete (more cubic yards than were poured for the new Yankee Stadium project the year prior); a distinguished visitors center at West Point in 2011; and the Ashokan Reservoir project, completed in 1983.

The latter was "one of the projects I worked on that I found the most interesting," Dawsey said of installing a power plant at the reservoir, a few miles southwest of Woodstock, N.Y.



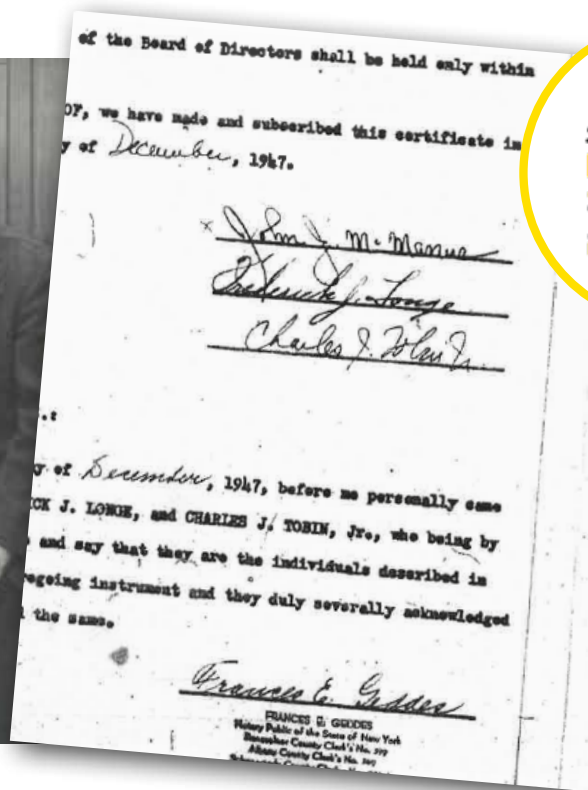
MLB Construction's First Office: Fred Longe's attic.



MLB Construction's Fourth Office: Northway Lane.



From Left to Right: MLB Construction Services Founders John McManus, Fred Longe, and Don Brockwehl.



"We excavated the whole area where the [town] fountain was, we went down a hundred feet, and we built a hydroelectric plant on the outlet of the water flowing down to New York City." After installing turbines and generators, "we covered the whole thing up and put the fountain back, and nobody even noticed there was a giant hydroelectric plant underground on the end of the Ashokan Reservoir."

Among other projects, MLB has been working on the two-phase Albany Airport renovation, an \$80 million endeavor.

Originally, "we built the first phase of the parking garage, we built the bridge, and now we're ripping the bridge down, ripping down the rotunda, and we're building a new bridge, a new parking garage, and we're renovating the whole interior of the airport itself," Dawsey said.

Construction work is nothing new to Dawsey, who started as a laborer as a young man- not a carpenter like his father, grandfather, and an uncle before him. He got a taste of construction as a child, going to his father's worksites and taking in the various jobs that made up a project. After graduating from Manhattan College in the Bronx in 1975 with a civil engineering degree, he figured he would soon get a job in the Big Apple.

"I was hanging around with a lot of

New York City kids, and I thought, 'I'm never going to go back upstate; they're a bunch of hicks.'"

But the first job offer he received was from an Albany contractor, August Bohl, so back upstate he went – and has remained ever since. He worked for Bohl for a few years, got married, then sought another job. He was hired by MLB in 1979 and never strayed.

Two years earlier, according to Dawsey, the three original MLB owners had tried to make an executive transition with three of its employees, but the plan didn't work out and was scrapped. In 1987, McManus, Longe, and Brockwehl attempted another transition with Tom Eckert, Bryan Fox, and Dawsey's father (also named Jim, who had preceded his son there). That one stuck, and by the mid-1990s, the company, then MLB Industries, had its new leaders. The elder Dawsey, a part-owner, was named Vice President of Operations until his retirement in 1997.

The Malta business has won five Build New York awards, the last one completed in 2021 in New York's capital city, for which MLB also won a New York State Excellence in Historic Preservation award.

"We renovated the Nabisco Baking Company building in the south end of Albany and turned it into the new [Capital Repertory Theatre] building," Dawsey said. When MLB

began the project, "the building was barely standing. We went in, and we structurally reinforced the whole thing and put a 300-seat amphitheater in there."

In 2018, a lightning bolt struck Saratoga Springs City Hall, and the subsequent fire and water damage from fighting the blaze left the two upper floors in ruins. MLB renovated the entire building and, for that effort, won national recognition in 2022 from the American Public Works Association under the category of small cities/rural communities: a Public Works Project of the Year award for historical preservation and restoration.

According to Dawsey, 88% of MLB's projects are "repeat business" clients. "That says to me that we're giving them what they want - they want an honest contractor that gives them good quality, and when their next project comes up, they'll typically give us a call."

"We're actually in a growth mode right now," said Dawsey, who added that MLB has completed more than \$90 million in projects in 2023, "and we're set up to do \$100 million next year. I'm really excited. I'm happy that we're still alive and kicking after 76 years and, hopefully, this next crew will bring us up to the 100-year level."

MLB can be contacted at mlbind.com or by calling 518-289-1371.

BUYING LOCAL

Saratoga, Warren, and Washington County have no shortage of fantastic goods and services to offer! In this podcast, our host Mike Nelson will clue you in on the amazing gems hidden in your very own community!



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EPISODE 49

Building Better Culture with Tom Schin

In this episode, our host Mike Nelson interviews Tom Schin, the man behind the important consulting business of Build Better Culture! Every organization thinks they have a great workplace culture - but not all of them actually do! Tom knows the secrets to employee satisfaction and retention... But you might be surprised by how inherent they are! Listen to this episode to find out more!



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EPISODE 48

Riding the Rails of Progress with Stimler Advantage

In this episode, our host Mike Nelson interviews Neal Stimler, the President of Stimler Advantage! Technology development has accelerated by leaps and bounds in recent years, and keeping up with it can be an overwhelming task... But Stimler Advantage has all the know-how to catch you and your business up with the times - making your processes efficient, and keeping your strategy tightly focused!



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EPISODE 47

The Two Key Words - Experience, and Teamwork

In this episode, our host Mike Nelson interviews Kris Brunelle, owner and CEO of White Glove Janitorial Service! He may be the executive at the helm, but Kris still does cleaning, team-building and managing along with his salesmanship duties. The key words to his success? Experience, and Teamwork! How have these things helped his small startup thrive this past year? You'll have to listen to this episode to find out!



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EPISODE 46

The Ultimate Beverage Solution! MicroBottler Seals it All!

In this episode, our host Mike Nelson interviews Doug Ernenwein, Jordan Wood, and Scott Lufkin from DK Advanced Technologies! They have an amazing product on offer that truly does it all - the MicroBottler, an affordable, adaptable, customizable and portable solution for any and all of your beverage-containment needs! Canning and bottling, any size you need... MicroBottler is one amazing machine!

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We will showcase REAL Blue Collar businesses in interviews, and use these stories to help educate and empower the next generation of trades workers to become Blue Collar business owners.



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EPISODE 44

Fabricating the Future

In this episode, our hosts Mike Nelson and Derek Foster interview Terrence Musto and Robert Manasier - the creator of Fabbro Industries, and the business mentor that helped him do it! From a humble start building custom bikes to running his own professional fabrication shop, Terrence's business is a stunning example of the kind of value a business mentor like Robert can provide. Want to learn how to take that idea of yours to the next level? Listen to this episode to get a few clues!



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EPISODE 43

Breaking the Blue Collar Stigma with Curtis Lumber

In this episode, our hosts Mike Nelson and Derek Foster interview Doug Ford and Pam Stott, two employees of Curtis Lumber who specialize in workforce development! It's all anyone can talk about now: "Where are all the young workers?" "What will happen to the trades in ten years?" If Doug and Pam have anything to say about it, things will only get better - they're dedicated to educating people across the state about their options, and the wonderful truths about Blue Collar work - it's not "a backup job", it's skilled, profitable, fulfilling, and essential!



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EPISODE 42

Lifelong Skills to Pay the Bills from WSWHE BOCES

In this episode, our hosts Mike Nelson and Derek Foster interview Jared Davis and Samuel Stork - teacher and graduate respectively from WSWHE BOCES! They've got programs in dozens of different subjects for kids and adults alike, but one particular strength of their offerings is the Blue Collar menu! Horticulture, heavy equipment operation, welding, automotive - whatever your shade of blue, BOCES has a program for you!



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EPISODE 41

The Perfect Mix for Success in Project Management

In this episode, our hosts Mike Nelson and Derek Foster interview Kelsey Martin and Craig Dittl, two project managers from MLB Construction! They work with all kinds of people, from experienced Boomers to green Gen Zs, and no matter what the project, they keep the team and clients happy and get things done! What's their secret? Listen to this episode and find out!

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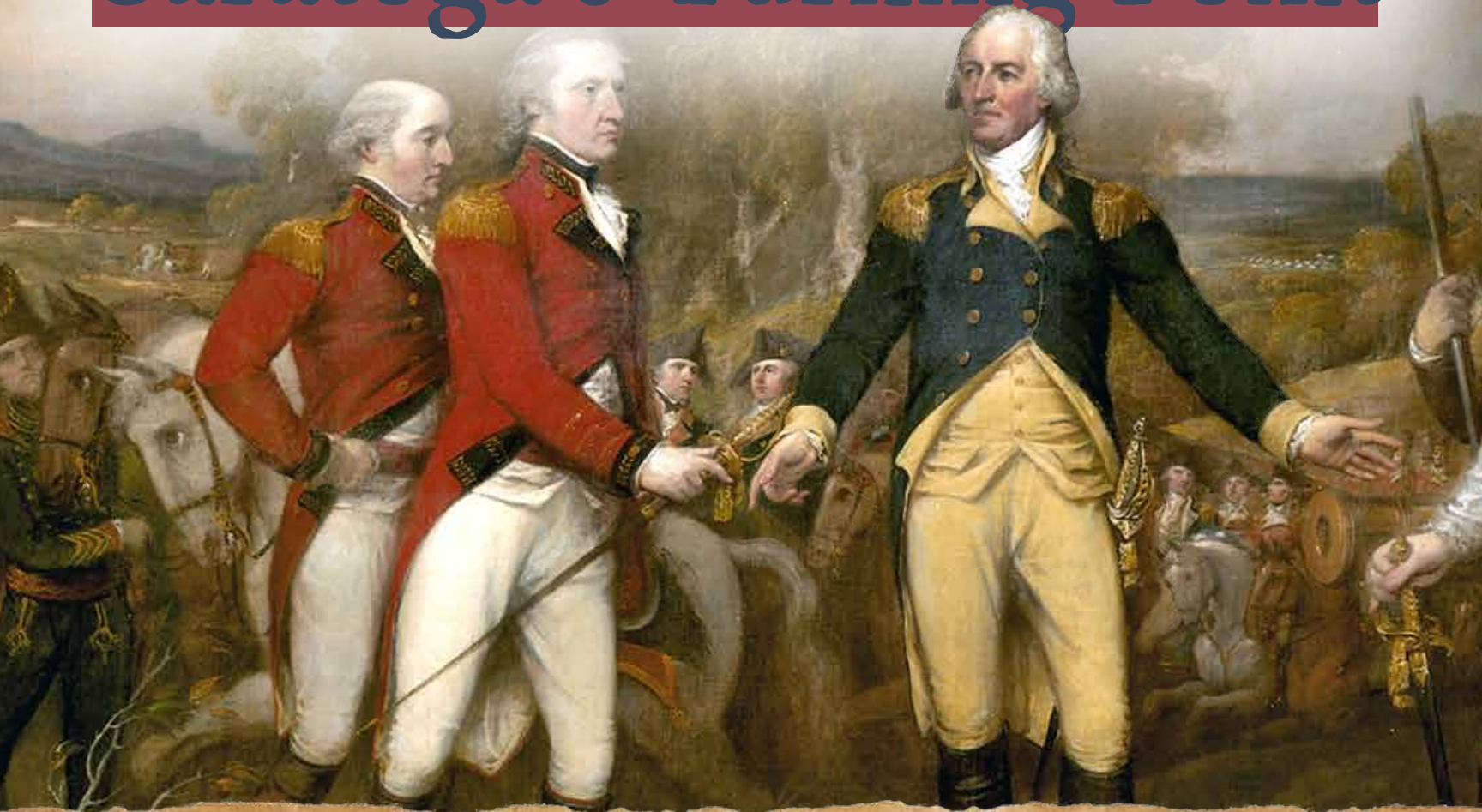


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Honor, Sacrifice, Victory The Untold Story of Saratoga's Turning Point



Mark T. O'Rourke, Esq.,
Producer and Managing Member
Saratoga 1777 LLC

WRITTEN BY **MIKE PIEKARSKI**

More than a decade ago,

Mark O'Rourke had a vision. In his mind's eye, he foresaw something grand in scope - a timeless, patriotic, captivating story that would be shown to the masses. It would be a tale of bravery, devotion, selflessness, and honor — and it would be about an area of the country he had come to know as his own.



The site? Saratoga National Historical Park. The story? The authentic, sweeping spectacle of two battles waged in 1777 that – against all reason – resulted in the conquering of a heretofore unbeaten army and directly led to a fledgling nation’s improbable triumph in its fight for independence. It is the story of the Battles of Saratoga.

That tale, envisioned in an independent film titled *Saratoga: The Turning Point*, has not yet been made, but its ultimate creation, the focus of a project O’Rourke is spearheading, has now turned the corner and is on firm footing.

On Oct. 17, 2023—the 246th anniversary of the British Army’s surrender at Saratoga that cemented the Continental Army’s stunning victory—the fundraising portion of the project was publicly launched. That day, the project’s website (1777.org) and social media footprint was initiated and crowdfunding, geared toward veterans and what O’Rourke calls “their fellow patriots,” began.

The primary goal, says O’Rourke, chatting with a reporter in a recent telephone interview, is to have the film completed and ready for national circulation by the fall of 2027, the 250th anniversary of the twin battles of Freeman’s Farm and Bemis Heights. O’Rourke and the other principals of the project plan to screen a movie that, according to its website, “evocatively and compellingly tells the story of Saratoga in a way that rivals iconic masterpieces such as *Last of the Mohicans*, *Dances with Wolves*, *Glory*, and *Saving Private Ryan*.”

Some historians rate the Battles of Saratoga, fought in September and October 1777, as among the most consequential in world history because the result persuaded France to enter the fray, the “turning point” that ultimately led to Britain’s downfall at Yorktown, Va., in 1781 and America’s eventual independence, officially recognized in 1783.

The film, O’Rourke insists, does not intend to concentrate – as is typically done in a movie of this kind – on the generals involved. In the case of Saratoga, the men in question were John Burgoyne for the British and Horatio Gates for the Americans.



We’re unapologetically trying to focus on the actual people that served – their courage, their sacrifice – those that did the heavy lifting, those that allowed us to prevail at that critical moment. We want their stories to be told.”

The untold story that **CHANGED THE HISTORY BOOKS.**



"What enabled the American Army to prevail at Saratoga, the reason Burgoyne was cut off- surrounded- was [that] the ordinary citizen soldier across New England and upstate New York came in from the four corners at the 11th hour when all appeared to be lost and when America needed a miracle," says O'Rourke, 53, a self-described American history buff.

In order to turn the tide of the battles, and eventually the war, O'Rourke explained, "It was this massive surge of citizen soldiers from various state militias. They were volunteers; they weren't paid. They didn't have to come, but they did. It was the first time the American Army had overwhelming numerical superiority in the Revolution. They enabled General Gates to deliver a knockout blow.

"We're unapologetically trying to focus on the actual people that served - their courage, their sacrifice - those that did the heavy lifting, those that allowed us to prevail at that critical moment. We want their stories to be told."

It is no surprise that O'Rourke, who currently works in government affairs representing a biotechnology company, was intrigued by the Colonials' call to fight. Born into a family of veterans, the native of Huntington, Long Island, answered the call to duty himself, serving as a Reserve Officers' Training Corps cadet while in college and then for four years in the United States Army.

When he moved to Saratoga County in 2005, the former Boy Scout found the verdant plains and undulating hills

of Saratoga National Park a perfect bicycle destination. Visiting the park - and especially its largest section, Saratoga Battlefield, "three or four times a week" - he gradually learned about the battles fought there over two centuries earlier and their importance to the history of the United States.

"I was totally ignorant and uninformed about the Battles of Saratoga and their significance," says O'Rourke, who graduated from Villanova University with a double major in history and political science. "I had no idea it was the turning point [of the Revolutionary War]. The more I learned, the more I inquired, 'Why don't more people know about this?'"

Few did, so he decided to take matters into his own hands.

In 2012, he and a partner founded the forerunner of the current venture, Saratoga Feature Film Project, and eventually produced a screenplay. But after seeing large sums of his money squandered and little Hollywood interest in it, the partnership dissolved, and O'Rourke tried another angle.

In 2017, taking advantage of his Army connections, O'Rourke traveled to the United States Military Academy at West Point, N.Y. - specifically its history department - where he met Dr. James Kirby Martin and, later, retired Col. Kevin Weddle and Robert Burris. Martin, a military author and historian, and Weddle, a historian and professor of military strategy, are project senior advisors, while Burris, a feature film writer and

television producer, is the primary screenwriter.

The proposed film - unusually - not only is a veteran-owned enterprise, but "it is entirely New York-based," says O'Rourke, a Saratoga Springs resident. "It really is an organic and home-grown project. We want America's veterans and fellow patriots to be the foundation of the project."

In addition to the veteran outreach, nearly 200 area businesses have signed on as "Friends of the Film."


"We are absolutely committed to telling this [story] in an authentic way so that we are showing the courage, faith, grit, and wisdom it took to prevail," O'Rourke says. "Not just for the War of Independence itself, but then throughout American history, those same elements were necessary to keep the sacred fire of liberty burning. These intangibles, these attributes, were critical to success because there was so much hardship and sacrifice."

The project's principals estimate that it will need \$125 million over the next two years to bring the film to fruition and is asking veterans and others to contribute and spread the word. The principals envision filming to be undertaken at or near the sites where the actual historical events occurred, including the Adirondack Mountains, the Champlain, Hudson, and Mohawk valleys, as well as Lake George, including Fort Crown Point, Fort Ticonderoga, and the battlefield location itself.

"What we're trying to do with this project is make sure that it's understood that the victory at Bennington [Vermont] a month earlier and Saratoga - they were both complete victories - as well as the sacrifice that occurred that summer in the Mohawk Valley at the Battle of Oriskany and the siege of Fort Stanwix. This is what saved the Revolution and what enabled Benjamin Franklin to forge the desperately needed alliance with France. It was a game-changer.

"When the victory at Saratoga occurred, Philadelphia had just fallen [on Sept. 26, 1777], so the nation's two largest cities [along with New York, which fell in 1776] are under [British] occupation. And if we lose at Saratoga, it's probably over. Upstate New York - this area - saved the American Revolution. And that is mind-blowing!"

O'Rourke, the passion evident in his voice, sums up the project this way: "We need to link arms and will this movie into existence; we want this to be a motion picture masterpiece - that's the vision. We're going big, or we're going home - the story demands that!"

For more information or to donate to the project, go to 1777.org. To find project information on Facebook, Instagram, and X (formerly Twitter), go to: [@77TurningPoint](https://twitter.com/77TurningPoint). 

“

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NAVIGATING BUSINESS *and* MARKETS

Two Critical Variables for Success and Survival in 2024



WRITTEN BY
CONOR BOYD,
FOUNDER & MANAGING
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THOROUGHbred ADVISORS

For the past twenty years, I have marveled at the thousands of strategies for making money in the markets and making money in business. Often these strategies are completely contradictory to one another yet when applied appropriately, both can work. For example, some investors consider themselves contrarian investors, one of the most famous being Warren Buffet. These investors tend to look for companies who have depressed stock prices, not so much from the company's doing but the environment in which they find themselves. When many others are selling, contrarians are looking to buy. On the other end of the spectrum, you have momentum investors who are looking for stocks that have higher prices over some period. In a sense they may be looking for a speeding train, jump on and ride that momentum to higher gains. Very different philosophies and both can work when applied appropriately.

The above sets the framework for a distinction I would like to share and an opportunity you have as a business owner or investor in this New Year. Though there are thousands of ways to make money in business and the markets, I have been able to identify only two variables that tend to be present when people lose significant money in business or investing. I want to be clear that these are my personal observations over the past twenty years of meeting and working with thousands of business owners and investors.

THE IMPACT OF A LIQUIDITY CRISIS AND OVERCONFIDENCE

The two variables I have identified after examining many failed businesses and investments are a liquidity crisis and overconfidence. These can happen in any order. When someone has a liquidity crisis, they are often forced to sell assets at inopportune times. Inevitably, the times at which people need money are exactly at a time when selling assets is not necessarily favorable. Think about the Pandemic. This gave many business owners a crash course in how quickly a liquidity crisis and overconfidence can create significant losses. The hospitality industry was hit harder than most industries.

What do you do when you have a fully staffed restaurant that has invested significantly in their infrastructure to create a wonderful dining experience for their patrons, and ALL the patrons go away in one day? The government stepped in and was able to help many of those businesses but for the ones who lacked liquidity to keep their doors open until that help arrived, in many cases these businesses were forced to close their doors forever.

How about some of the large bank failures? Perhaps there was overconfidence after years of low interest rates and controlled inflation that the Federal Reserve would raise interest rates at a snail's pace should the need arrive. This would give these banks enough time to get their assets matched appropriately to their liabilities. As history has now revealed, this was not the case, and many banks failed.

Liquidity is an area that we spend a significant amount of time discussing and investigating with our clients. Each client, depending on many different variables, has a different number for what constitutes an appropriate level of liquidity. How this liquidity is housed can also vary widely. Simply leaving

money in a business checking or brokerage money market account can have a significant drag on potential returns over the years.

Many of the business owners I work with have thriving businesses. With that said, when I look at the past 5, 10, or 15 years and ask them what they have to show for it... they sometimes look back puzzled. 'What do you mean? I have a thriving business.' Which is true, but often, that thriving business has supported an equally thriving lifestyle. As entrepreneurs, aside from lifestyle, we often are geared toward investing everything back in our business. And this can be a winning strategy...until a liquidity crisis and/or overconfidence rears its ugly head. If you have been in business long enough, you know exactly what I am saying as you have likely weathered a number of these storms.

I believe that if you are a business owner or serious investor, quantifying your need for liquidity and how to house it should be part of your New Year's Resolution. One of the things we say at Thoroughbred Advisors is, "every day is a good day to save,

but not every day is a good day to invest." If you would like to involve a financial professional in your discussions regarding your liquidity and growth strategies feel free to reach out to us at 518-608-4608 to have a complimentary consultation. ☎️

The information provided herein is for general informational purposes only and should not be considered investment advice. Any strategies described may not be suitable for everyone. Readers are encouraged to evaluate all information in light of their own situation, and seek the advice of an appropriate professional advisor.


About Thoroughbred Advisors

Thoroughbred Advisors is a leading financial firm dedicated to providing tailored, transparent, and authentic financial solutions for their clients. Established in 2014, the firm focuses on empowering individuals, families, and businesses in the Capital Region to achieve lasting financial success.

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Financial Preparations for Business Acquisition

A Comprehensive Guide



WRITTEN BY **MATTHEW WAGONER**

The journey to business ownership is an exciting yet complex path, laden with significant financial decisions and preparations. Acquiring a business is not just about making a purchase; it's about setting the stage for future success.

In the first 2 parts of our 4-part series, we talked about the benefits of buying and selling a small business, as well as the initial steps in the process. In Part 3 of our series, this quarter's article aims to navigate you through the financing process and options.

TRADITIONAL FINANCING: BANKS AND CREDIT UNIONS

Banks and credit unions are the go-to sources for traditional financing. They offer loans based on several factors such as your credit score, a well-crafted business plan, and the financial health of the business you're interested in. It's vital to understand the terms of these loans, which often require collateral and come with stringent repayment conditions. While this route can be beneficial for those with a strong financial background, it may not be accessible to everyone.

SBA LENDING: A HELPING HAND FOR ENTREPRENEURS

The Small Business Administration (SBA) offers a lifeline to entrepreneurs, providing access to capital through various loan programs tailored to small business needs. These loans, known for their favorable terms and lower interest rates, significantly ease the financial burden on new and growing businesses. Additionally, the SBA offers guidance and resources, making it an invaluable partner for entrepreneurs navigating the complexities of business ownership and expansion.

SBA 7(a) Loans: This program, designed for broader purposes, is especially beneficial for buyers who may not qualify for traditional loans. It offers competitive interest rates and longer repayment periods.

SBA 504 Loans: Targeted towards the purchase of real estate or heavy equipment, this loan is ideal if the business you're acquiring includes substantial assets.

SBA Microloans: These are smaller loans, perfect for startups or as supplementary funding. They're a great option for those looking at smaller ventures.

SELLER STANDBY NOTE: A UNIQUE FINANCING OPTION

In certain cases, sellers are willing to finance part of the purchase price. This involves the buyer paying a portion upfront and the seller financing the balance. These arrangements can be particularly useful in bridging the gap if you're unable to secure the full amount through other means. It's a path that requires careful negotiation to ensure terms are favorable for both parties.

EQUITY FINANCING: SHARING THE OWNERSHIP

Seeking investors who provide capital in exchange for equity is another route. While this is a traditional approach for startups, it's becoming more common for buyers to take on minority investors looking for opportunities to align their strategic goals, networks and skills with buyers they believe in. You will have to give up a share of the business in return for the investment. In return, you should be looking for ways the investor can help scale the business beyond investment dollars.

THE IMPORTANCE OF A SOLID FINANCIAL PLAN

Before embarking on any of these financing routes, it's crucial to have a clear and detailed financial plan. This includes understanding all the costs, interest rates, and terms associated with each financing option. Working with a financial advisor or an accountant who has experience in business acquisitions can be invaluable in this regard. Start by evaluating your financial situation thoroughly, including your assets, liabilities, credit

history, and current financial obligations. You'll also need to craft a business plan to secure financing and thoughtfully plan your venture. This should encompass financial forecasts, market analysis, and strategies for growth. A well-developed plan demonstrates to lenders and investors that you are prepared and committed to the business's success.

NAVIGATING THE NEGOTIATION PROCESS

Negotiating the purchase price of a business requires skill and understanding of its true value. This involves analyzing the business's earnings, market position, and growth potential. An accurate business valuation or a quality of earnings report, ideally conducted by an experienced professional, forms the basis of effective negotiations and fair market value of the business.

CONDUCTING THOROUGH DUE DILIGENCE

Due diligence extends beyond mere financial scrutiny; it encompasses a comprehensive analysis of the company's market position, competitive landscape, and customer base. This broader perspective offers insights into the business's sustainability and growth potential, factors that are essential for long-term success. Additionally, due diligence also involves evaluating the management team and employee structure, as the caliber and stability of the workforce are pivotal to the ongoing operations and future development of the business.

RISK MANAGEMENT STRATEGIES

Identifying and mitigating risks is an essential part of the acquisition process. Strategies such as securing appropriate insurance, developing contingency plans, and maintaining a financial buffer can help manage the risks associated with a new business venture.

CLOSING THOUGHTS

Purchasing a business is a very serious undertaking that requires thoughtful financial preparation and planning. By exploring various financing options, assessing your financial standing, crafting a comprehensive business plan, and conducting thorough due diligence, you can navigate this challenging landscape more effectively. Remember, the guidance of experienced financial and legal experts can be invaluable in making informed decisions and setting the stage for the successful ownership of your new business venture. The key to a successful acquisition lies in thorough preparation and strategic financial planning.

Coming up in our fourth and final installment, we will be talking about the final steps in the sale process—ways to find the right business for purchase. For more information, please visit thewagonerfirm.com.

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Bringing it Home with Bob Fitch Insurance Agency

WRITTEN BY JORDAN DUNN

In a world where people change jobs so rapidly, calling State Farm home for so many years has been a privilege. I get to do what I love every day; what's better than that?"

Home. It's a concept that has played a leading role in many of life's biggest decisions for local insurance agent and business owner, Bob Fitch.

For the last 23 years, Fitch has called State Farm home. And, despite a few detours, he's been calling the Capital Region home even longer. So as of January 2023, he was ecstatic that both of those homes were, at long last, going to be sharing the same zip code: Saratoga Springs.

Fitch originally got his start with State Farm back in college. After a season of coaching a youth basketball team in the local community, Fitch was approached by the father of one of his players. Along with offering thanks for a great season, he also proposed an important question to consider.

Fitch recalls the memory fondly. "So the dad asked, 'What are you looking for when it comes to your career after college?' As a 21 year old I wasn't totally sure. So when he went on to tell his own story of working at a local State Farm Agency, and all of the opportunities it afforded him over the years, I was hooked," said Fitch.

Fitch would go on to begin an internship at that same local State Farm Agency, and it made a strong impression on him. Looking back, it's clear to see that as the first step in a lifelong career. "The culture, the local aspect, the ability to help people at times that really mattered, made it all a great fit. I had that gut feeling that I belonged there you know?" recalled Fitch.

After finishing college with a B.S. in Business Management at Green Mountain College, Fitch moved down to Florida and started a full time role with a State Farm Agency in that area. While it was an amazing place to start, Fitch and his wife knew that when they started a family, they wanted to do so in the place they once called home. So back to Upstate New York they came and they haven't looked back. Officially opening his own agency in 2011, Fitch set up shop in Moreau off of exit 17 of the Northway.

Once again, it was an amazing place to begin, but for Fitch it just wasn't as close to home as he'd like. He and his wife,

Mena, and his 3 children were firmly rooted in Saratoga Springs. And, after all, even just a few exits on the highway can start to feel like a long commute over the years. But more than that, Fitch wanted his business to more directly serve and give back to the community that was helping to raise his family.

This past January, Fitch was able to make his goal come true when the doors opened to the Bob Fitch Insurance Agency on Maple Ave. The agency- home to Fitch and 4 staff members, all with their own ties to the local Saratoga community- seeks to not only help provide insurance solutions but to educate their clients as well.

"The first step in our process is always to ask thorough discovery questions," said Fitch. He described how asking these questions allows him and his team to get a true feel for the client, their stage of life, and their needs. At that point, Fitch and his team can determine not just what kind of plan makes the most sense for them but it also affords Fitch and his team the opportunity to educate the client on why these plans are important. "It's a personal motto of mine that 'you don't plan to fail, you fail to plan,'" said Fitch. It's a valuable piece of education that he hopes all his clients can benefit from.

Fitch continued on to highlight how clients will come to him and his team looking for all kinds of plans. For some, it's a more typical home or automobile policy. For others, the plans cover various assets like high-value personal items or family antiques. "We even have people who use us to insure their pets too!" added Fitch.

When not assisting the community through his work at the office, Fitch can be found doing much the same out in the community itself. Thoroughly believing in the spirit of giving back, the long list of Fitch's philanthropic endeavors includes (but certainly isn't limited to): coaching and donating to local Saratoga youth sports programs, contributing to Snack Pack Programs at schools, donating to the St. Baldrick's Foundation and providing and operating a Golf Cannon at local charity tournaments.

Bob Fitch's journey shows us the profound significance of home—not just as a place, but as a foundation for community, career, and growth at many different levels. His journey from an intern at State Farm during his college days to the proud owner of his own insurance agency in Saratoga Springs is a testament to his commitment to the local community. This narrative isn't just about climbing the corporate ladder; it's a story of how dedication, coupled with a deep sense of belonging, can lead to both personal fulfillment and professional success. 🏠



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