

JOIN THE YOUNG LEADERS ALLIANCE

YLA membership now free for all LWRBA members under 40.

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THE LWR GUIDE

Welcome to an outstanding opportunity for your business.

PG 09

WELCOME NEW BOARD MEMBERS

Welcoming new members to our Board of Directors.

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ON THE CALENDAR

See what's coming up and mark your calendars today.

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January 2019

the alliance

Winter 2019

Hit The Ground Running
in 2019

PG 07



LAKEWOOD RANCH BUSINESS ALLIANCE

8430 Enterprise Circle, Suite 140

Lakewood Ranch, FL 34202

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**For more information, including patient experience stories, visit
lakewoodranchmedicalcenter.com/ortho. Or call 941-782-2663 to
speak with a care coordinator.**

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[Lakewood Ranch Business Alliance](https://www.linkedin.com/company/LakewoodRanchBusinessAlliance)

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Lori Ruth//Past Chair
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Norton, Hammersley, Lopez & Skokos, P.A.

John Holz//Economic Development Chair
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Britney Guertin//Young Leaders Alliance Chair
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Maribeth Phillips//Executive Academy Chair
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Robert Lewis//Ex-Officio
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Zachary Buffington//Legal Counsel
Williams Parker Harrison Dietz & Getzen

Rex Jensen//Emeritus
Schroeder-Manatee Ranch

Lou Marinaccio//Emeritus
Gallagher MGA

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Heather Williams
Chair of the Board

2018 was an amazing year. I want to personally thank the Alliance Staff, Board of Directors and Members for their dedication and passion to our organization and our business community. Last year our community partnerships were strong, our Community Engagement committee was started along with the completion

of our 1st Alliance Gives Back Day, the programming was relevant, along with many memorable events. We welcomed two new staff members, Caitlyn & Janeth. Under our amazing leader President & CEO Heather Kasten, this team will be equipped to handle our membership growth and opportunities.

At the 2018 retreat, the board of directors took a deeper dive at how we can continue to build upon the Alliance's successes and stay focused on The Power of Connection. As we convene throughout the year, we aspire for the meetings, programs and events to continue to be well-thought-out, with the goal of retention and engagement. Looking ahead to 2019 we will continue to stay focused on:

- **Engagement of our Members** - Staying top of mind by providing members opportunities to grow relationships, providing relevant tools to assist them in their success and their businesses.
- **Hub of Influence for the Business Community** - Promoting business growth, providing members exposure and support. The Alliance will continue to be dedicated to working with both large and small businesses to support our vibrant business climate.
- **Technology** - We will continue to expand our footprint, building off the newly revamped website, communication to our members via video and social media outlets.

I feel honored to volunteer alongside many of you that have such a passion for our organization. I'm excited to support and assist the Alliance to be in the best position to seize opportunities in 2019!

Heather Williams
2019 Chair of the Board



Heather Kasten
President/CEO

This year, LWRBA is heading into its 14th year of connecting people in the LWR Region. From our humble beginnings of 4 business professionals huddled around cups of coffee to today, where we are knocking on the door of 700 member businesses

in 2019. As we move forward into the New Year, I am even more excited and encouraged about what lies ahead for the Alliance.

Last year was a monumental year for the Alliance- with the unveiling of our new website, the creation of our new Community Engagement Committee, and so many new programs and educational opportunities for our members. All of these things are done with the intent to support our members and our goals of connecting, educating and strengthening the business community in the LWR Region.

In 2019 we will be investing in new forms of technology and adding staff to help us better support our members and their business needs. We are developing new tools and benefits that will enable us to continue to deliver a blue ribbon member experience. We will be partnering with regional and national organizations to bring more opportunities into the fold for our members. And everything we do is done with strategic intention to what sets our organization apart- the power of connection- connecting people.

What gets me super jazzed about our future is that while we are a different organization than we were back in 2005, we are the same group of people, with big hearts, and the same purpose of genuinely connecting business professionals with who they want to connect with. Thanks for being a part of our Alliance family and here's to our next chapter of 2019!

Heather Kasten
President/CEO

The Power of Connection for Young Professionals

New for 2019, we're excited to announce that **Young Leaders Alliance (YLA)** membership is now included for all LWRBA members under 40, with no additional fee. The YLA is an extension of the Alliance whose mission is to empower and equip young professionals and build authentic relationships by harnessing the Power of Connection.



- Build meaningful relationships & meet new friends
- Develop your skill set & increase professional abilities
- Amplify your visibility & brand exposure
- Additional channel for referral sources

JOIN TODAY! LWRBA members under 40 can join the YLA free of charge at www.LWRYLA.com.



UPCOMING YLA EVENTS

January YLA Social at Gecko's on Fruitville
Thursday, January 24 // 5:30-7:30 p.m.

YLA Mini Golf at The Fish Hole & Ed's Tavern
Thursday, February 28 // 5:30-7:30 p.m.

YLA at the Bradenton Area EDC Hob Nob
Thursday, March 7 // 5:30-8:30 p.m.
(Discounted Tickets for YLA Members)



Congratulations Sandies Winners!

The Lakewood Ranch Business Alliance announced this year's winners at the 2018 Sandies Awards on November 16th.

Volunteer of the Year Award

Erik Hanson, Norton, Hammersley, Lopez & Skokos P.A.

Above & Beyond Award

Toni Perren, Observer Media Group

Rising Star Award

Laura Lynch, Edward Jones

Ray of Sunshine Award

Kelly Erdmann, Nothing Bundt Cakes

Networking King Award

Bruce Loepke, Willis Smith Construction

Networking Queen Award

Shawna Hicks-Cranston, PostNet of Lakewood Ranch

Bull by the Horns Award

Monaca Onstad, Lakewood Ranch Communities

Young Professional of the Year Award

Britney Guertin, Grapevine Communications

Best Rancher Award

Jaime Marco, Evolve Business Consulting

Flip to page 16 for more event photos!

Hit The Ground Running in 2019



Rolling into a new year allows us to reset and refocus. Many use this time as an opportunity to course-correct or set their sights on new horizons. In fact, mankind has used this symbolic transition to declare goals and resolutions long before the adoption of our modern Gregorian calendar. The reasoning is clear; setting goals helps you organize your time and resources, and provides long-term vision and short-term motivation.

We've asked a few of our members to share a goal or New Year's Resolution for 2019. With a clear objective and renewed focus, they are ready to 'hit the ground running' in 2019. Are you?

"2019 is Fawley Bryant Architecture's 25th year in business. Our goals revolve around authentic community engagement, a continued emphasis on client partnerships and relationships, and a renewed focus on company culture."

- Amanda Parrish, Fawley Bryant Architecture



"Our goal is to add 10 new advisors in 2019, four in Q1, and increase our impact in the community, making mutually beneficial relationships with business and community leaders."

- Ryan Fonville, Northwestern Mutual

"This could not be a more exciting time for our three brand new Choice Hotels sitting right on the corner of Sarasota's Gateway (Fruitville Road & I75). After opening this year our dual concept Sleep Inn / MainStay Suites, we are 'hitting the ground running' with our Comfort Inn & Suites. Our 'goal' is opening in the summer of 2019! Both will be surrounding our 90' X 30' resort style pool with zero entry and exciting pool amenities!"

- Laurie Pike, Sleep Inn / MainStay Suites



"My top business goal for the new year is to increase donor relations and grow our annual giving program by 20%."

- Maureen Bradley, Cardinal Mooney High School

"Synovus' Top priority in 2019 will be the maximization of client experience while integrating with Florida Community Bank, accomplished through seamless execution and leveraging of our combined strengths."

- Dom Dimaio, Synovus



"I'm very excited for this year. One area of focus and passion right now is treating EVERYONE with the highest level of respect and care. We have a very unique and diverse community, and it's been a great joy learning life lessons from individuals of all different career paths from janitors to CEOs. Take a moment and learn something new about your neighbor. Trust me, it will help your business, but more importantly, it will make you happier."

- Tom Johnson, LWR Commercial Realty

"In 2019, I would like to help as many small and medium businesses grow as I can."

- Michael La Rocco, Netwurx Technology Group



"As a new company in 2018, my goal for 2019 is to reach another level by increasing sales and connections for current clients, as well as bringing on new clients. It's about better knowing the community and the potential for growth and connections."

- Valerie Melignon, VEM Business Solutions, LLC

"Less is more in planning for a new year... My goal is to achieve a balanced life by focusing MORE on the purpose that is important to me and LESS on worrying about the small stuff! As I 'throw out' the negative and 'ring in' the new possibilities I am energized about 2019 as the BEST that is yet to come! Cheers to enjoying life!"

- Kim Hopper, IBERIABANK



"In 2019 my full intention is to earn the position of Regional Vice President Gold in my company. All three kids are enrolled in our vision to make this happen. They love cheering me on every step of the way!"

- John Barringer, Residual Success

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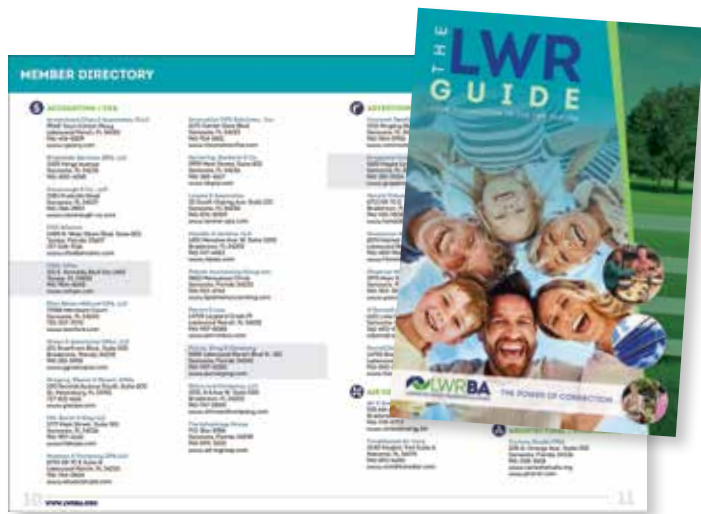
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Introducing The LWR Guide

Your connection to
the LWR region.



Welcome to an Outstanding Opportunity for Your Business! As a member of the Lakewood Ranch Business Alliance, you have the exclusive opportunity to put your business in the hands of **10,000+ locals and visitors** with an ad in our inaugural LWR Guide! As a benefit of membership, all members receive one FREE business listing.

The LWR Guide will be distributed to local doorsteps, visitor centers, waiting rooms, country clubs and more as the **#1 resource** for people searching for fun things to do, great places to go and an array of services in the Lakewood Ranch region.

Deadline to reserve ads is January 15th. **LWRBA membership must be renewed for 2019 by January 31st in order to be included in the directory.**

- Printing Early 2019
- 10,000+ Issues Published
- THE Go-To Guide for All Things Lakewood Ranch
- Enhanced listings and advertising opportunities for year-round visibility start for as little as \$100.

Visit www.lwrba.org/LWRGUIDE for details.

Welcome New Board Members!

Please help us in extending a warm welcome and congratulations to the newest members of the LWRBA Board of Directors. We're excited for 2019 and can't wait to see the energy they bring to our organization!



Sponsorship/Finance
Co-Chair
Charlie Murphy,
Bank of Tampa



Sponsorship/Finance
Co-Chair
Jeremy Burkinshaw,
The Mall at UTC



Events Co-Chair
Amanda Parrish,
Fawley Bryant
Architecture



Economic
Development Chair
John Holz,
Plunkett Raysich
Architecture



Programming Co-
Chair
Brett Morris,
Momentum
Consulting



Membership Co-
Chair
**Shawna Hicks-
Cranston**,
PostNet of LWR



Young Leaders
Alliance Chair
Britney Guertin,
Visit Sarasota
County



Ex-Officio
Robert Lewis,
Sarasota County
Government



Legal Counsel
Zachary Buffington,
Williams Parker
Harrison Dietz &
Getzen

Special thanks to our **Outgoing Board Members**

David Fink, Family Office
Services

Cherri Kessler, Achieva Credit
Union

Darren Inverso, Norton Ham-
mersley, Skokos & Lopez, P.A.

Jeff Maultsby, Sarasota
County Schools

Dianne Kopczynski, Mauldin &
Jenkins

Ryan McIntyre, ME&S General
Contractors

Ashley McCollum, Rediscov-
ered Moments Concierge, LLC

The individuals have shown incredible dedication and commitment during their time on the board. Your passion and hard work to the Alliance is invaluable. Thank you for your time and effort.

On the Calendar

Networking Social // Grove

Wednesday, January 9 // 5:00-7:00 p.m.
Grove, 10670 Boardwalk Loop

Join us for our first Networking Social of the year at the newly opened Grove Restaurant (formerly Polo Grill & Bar). Connect with fellow Alliance members and enjoy complimentary appetizers courtesy of Grove's incredible kitchen. Cash bar.

Free for LWRBA Members // Non-members \$15



Executive Briefing // Your Hire = Your Brand

Wednesday, January 16 // 7:30-9:00 a.m.
Keiser University, 6151 Lake Osprey Drive

Learn the principles to identifying and hiring the best talent from a panel of three local giants in the hospitality industry: Damien O'Riordan, General Manager of The Ritz-Carlton, Sarasota, John Horne, owner of Anna Maria Oyster Bar, and Mike Quillen, Owner of Gecko's Hospitality Group.

Members \$10 // Non-members \$20



Luncheon // 2019 Annual Membership Luncheon

Friday, January 25 // 11:30 a.m.-1:00 p.m.
The Ballroom at Grove, 10670 Boardwalk Loop

See what's in store for the Alliance in the coming year. Our 2019 Annual Membership Luncheon will honor our outgoing board members and reflect on the successes of the past year, as well as introduce the 2019 Board of Directors.

Members \$35 // Non-members \$45 (Gold & Silver Tables Available)



Networking Social // Sirius Day Spa

Wednesday, February 6 // 5:00-7:00 p.m.
Sirius Day Spa, 11585 E State Rd 70

Join us at Sirius Day Spa for our February Networking Social. Mingle with fellow Alliance members and enjoy complimentary appetizers and a cash bar. Tour this state-of-the-art spa and learn how Sirius can take you to relaxation.

Free for LWRBA Members // Non-members \$15



Breakfast // Women's Executive Golf Breakfast

Tuesday, February 12 // 8:00-9:30 a.m.
Lakewood National Golf Club, 17605 Lakewood National Pkwy

Join us at Lakewood National Golf Club, home of the Web.com Suncoast Classic, for an informational breakfast featuring a golf pro about doing business on the golf course. Includes optional tours of the Lakewood National facilities.

Members \$35 // Non-members \$45



Visit us online for a full calendar

Visit www.lwrba.org/events for more information on these and other upcoming Alliance events.



Breakfast // Paving the Road for Next-Gen Leaders

Friday, February 15 // 7:30-9:30 a.m.

The Ballroom at Grove, 10670 Boardwalk Loop

What can HR and managers do to ignite millennials, harness their vision, empower their future, and copilot them into leadership? This interactive presentation with keynote speaker and author Margaret Spence will lift the lid on how you can adapt your people strategies to rethink what it takes to keep millennials beyond their statistical half-life.

Members \$25 // Non-members \$40 (Event in partnership with SHRA)



Luncheon // The Bay Project & Why It Matters in LWR

Wednesday, February 27 // 11:30 a.m.-1:00 p.m.

Lakewood Ranch Golf & Country Club, 7650 Legacy Boulevard

Bill Waddill, Managing Director of the Sarasota Bayfront Planning Organization, joins us for a joint luncheon with the Rotary Club of LWR. Learn how SBPO's 53-acre "The Bay" project along US41 is progressing and the impact it will have in the Lakewood Ranch region.

Members \$25 // Non-members \$35



Luncheon // State of the Ranch with Rex Jensen

Wednesday, March 20 // 11:30 a.m.-1:30 p.m.

The Ballroom at Grove, 10670 Boardwalk Loop

Find out the latest happenings from around Lakewood Ranch as Schroeder-Manatee Ranch CEO Rex Jensen presents an update on the "State of the Ranch." Hear about recent successes, as well as what's in store for our community down the road.

Members \$35 // Non-members \$45



Upcoming Young Leaders Alliance Events

January YLA Social at Gecko's on Fruitville

Thursday, January 24 // 5:30-7:30 p.m.

YLA Mini Golf at The Fish Hole & Ed's Tavern

Thursday, February 28 // 5:30-7:30 p.m.

YLA at the Bradenton

Area EDC Hob Nob

Thursday, March 7 // 5:30-8:30 p.m.

(Discounted Tickets for YLA Members)

To register for these events, visit www.LWRYLA.com



2019 Signature Events // Save these dates!

Don't miss 2019's biggest events.
Mark your calendar today!

Friday, January 25

2019 Annual Membership Luncheon

Friday, April 26

Ranch Scramble Golf Tournament

Thursday, September 19

East Meets West Expo

Friday, October 18

Main Street Block Party

November 2019

2019 Sandies Awards



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Celebrating new businesses!

Visit our website's Member Directory to learn more about these new businesses.



Apothecare at Lakewood Ranch



Main Street Children's Dentistry



Apple Spice



Sirius Day Spa



Sarasota Architectural Salvage



PUMPS Fitness



Ringling College of Art + Design & UBS Financial Services, Inc.

Invite you to an informative lunch and learn program

Gifted Strategies for Private Foundations - Trends & Opportunities in Philanthropy

Learn how innovative donors are using lesser-known private foundation tools and techniques for maximum charitable impact

Thursday, January 10, 2019

10:00 a.m. - 12:45 p.m.

Ringling College of Art + Design Campus
Diane Roskamp Exhibition Hall
2700 North Tamiami Trail, Sarasota FL

Please RSVP by January 3rd to 941-309-0108

Guest Speakers

John Oddy, Senior Philanthropic Director of Foundation Source
Bill Sutton, Senior Strategist on the Family and Philanthropy Advisory Americas Team, Head of UBS Philanthropic Services
Jeff Troiano, Board Certified Specialist in Wills, Trusts and Estates, Partner at Williams Parker Harrison Dietz & Getzen

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Say Cheese!

There sure was a lot cooking at the Alliance this fall! In addition to three Signature Events, including East Meets West Expo, the 2018 Main Street Block Party, and our Annual Sandies Awards, we hosted our inaugural Alliance Gives Back! Volunteers Days in October, with over 150 volunteers working across 20 member non-profits! Way to go!

For more photos from these and other events, check out the LWRBA Facebook page!
www.facebook.com/LakewoodRanchBusinessAlliance



Goodbye Spreadsheets, Hello Hassle-free CRM!

CRM ISN'T ROCKET SCIENCE, BUT IT CAN MAKE YOU A DATA SUPERSTAR!

With spreadsheets going the way of the Dodo, the need to make the switch to a Customer Relationship Management (CRM) tool is ever increasing. Moving your daily processes and data isn't always easy, the move can be so difficult that many businesses (large and small) stick with spreadsheets for far too long. This is because dealing with the integration of data on top of the learning curve that comes with any new program isn't ideal when you have a business to keep afloat.



It's a difficult move to make but it is worth it at the end of the day. CRM's create better communication, track the progress of projects, speed up decision-making, and help staff to manage their daily processes. Knowing where you are at, and where you want to go is a good start. Choosing which CRM is best for your business is the easy part (Coanics!). Once you've decided on a CRM it is now time create an actionable plan of what needs to be done to make your move successful!

Creating the Roadmap

With your team, decide on a process from start to finish. What does your move to a fully functional CRM look like? Who is going to cleanse the data? How do you plan on using your CRM in the day to day? How long is this going to take? Answering these questions ahead of time will give you the awareness on where you are going so that no one gets lost.

Organization & Clean-Up

Knowing what information you have and how to organize it beforehand can greatly reduce the growing pains of moving into a CRM. Take advantage of this integration of data! Making this switch can be a great way to clean up, reorganize, and possibly even change how data is managed in your business. You're going to want to gather up your data in one place (if it isn't already) and begin to comb through it carefully. Cleaning up your data beforehand is going to make your life simpler instead of going back and cleaning up after you've thrown everything into your CRM. Get rid of those duplicate contacts, the outdated reports, and maybe some information you've been holding onto since 1992. This cleanup of your raw data can really make the learning curve of a CRM much more bearable in the long run.

Transfer Data in Batches

Now, you've created a plan, cleaned the data, and backed up your important information - it is time to begin the process of entering this valuable data into your new CRM. Once you have a sufficient amount of data that's ready to be submitted, it's time to begin the actual move. Doing this in small batches gives you a controlled amount of data to use in testing your importing tool on a smaller scale. Once you have imported your initial set of data on a small scale, it will then be much easier to double-check your data for mistakes. Take your time in making sure that everything from your initial set is identical to the set you have imported into your CRM before you start on the next batch. Uploading smaller amounts of information at a time makes it easier to spot changes that need to be made at the beginning of your importation strategy.

Experience Your CRM

Once your data is moved in and you've double-checked all that went into your CRM, make the final changes (if necessary) and contact the company who provides your CRM in the case that they need to tweak any of their processes. Now, all that's left to do is explore the different features of your CRM and see for yourself how much easier life can be.

With a CRM, you are not only upgrading the way your data is handled, but you'll also be bringing in all sorts of different benefits to your business. Once the growing pains are done, and the dust has settled you can enjoy better communication, team collaboration, and more fluid daily procedures thanks to your implementation of a CRM!

Connect with us!



To learn more about Coanics® and the services we provide

please visit www.coanics.com

UP TO 25% DISCOUNT ON THE COANICS® CRM APPLICATION TO LWRBA MEMBERS!

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 Allstate Owens Agency
 Bernice Borow Nutrition
 Big Jim Self Storage
 BSK Designs
 Business World Promo Supply/Children's World
 Uniform Supply
 Clear Solutions CFO
 Ellis Resolutions
 Excellence Performance
 Family Network on Disabilities of Sarasota
 Manatee, Inc.
 fotofinitySRO
 Gateway to Innovative Thinking
 Get A Grip Floor Solution
 Goodwill Manasota, Inc.
 Grove Restaurant
 Habitat for Humanity Sarasota
 Happy House Service Company
 Harvest House
 Harvest Methodist Church
 hibu
 HO HO, LLC
 Impressions MedSpa
 Intervest
 Kedron, Inc.
 Keller Williams Commercial - Richard Curtis
 Keller Williams Realty Select - Jan Swift
 Key Glass, LLC
 Knock Out Marketing & PR
 Kranenburg Painting, Inc.
 Lawrence Capital
 Morgan Stanley - Sylvia Millar
 Nurse Next Door
 OneGroup Wealth Investment Services
 Paradigm Pathways
 PUMPS Fitness
 Richard's Foodporium
 S3 Data Analytics
 Sarasota Architectural Salvage
 Shapiro Insurance Group
 Skyline Chili
 Suncoast Roof & Pauer Resotration
 TeamLogic IT
 The Broach School
 The Dilweg Companies
 The Founders Golf Club
 VEM Business Solutions, LLC
 Wawa

For a complete member list, visit
www.lwrba.org/MemberDirectory.

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Pay it Forward.

Shining a light on Non-Profits.

SunCoast Blood Bank

provides a reliable supply of safe blood products and services to our community. On February 14, 2019 it will celebrate 70 years of service. SunCoast supplies 10 hospitals with 100% of their blood products including Lakewood Ranch Medical Center, Manatee Memorial Hospital and Sarasota Memorial Hospital. It is the only locally managed, nonprofit blood bank, guided by an all-volunteer Board of Directors. Recognized for its outstanding service the Sarasota Chamber of Commerce honored SunCoast as the 2017 Non-profit of the Year. SunCoast participates in cancer treatment programs, research and provides therapeutic services at the hospitals it serves.

For donor locations and more information, please visit www.scbb.org.



Welcome to the Team!

Janeth Gonzalez

Events & Programs Coordinator

Please help us in welcoming the newest member to the LWRBA team, Janeth Gonzalez! As the Alliance's Events and Programs Coordinator, Janeth will work closely with the Events and Programming Committees to help plan and execute the LWRBA's 100+ yearly social and educational events. A recent graduate of Florida International University in Miami, Janeth brings with her a passion for event planning and customer service, having volunteered with the South Beach Food & Wine Festival and Miami's Dessert Wars.



Welcome, Janeth! We're excited to have you on our team and look forward to a great 2019!

The Lakewood Ranch Concert Series

MUSIC on Main

FIRST FRIDAYS 6-9PM

JAN Thomas Wynn & The Believers
American Country/Folk Rock

FEB Betty Fox Band
Blues & Soul Band

MAR Jah Movement
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APR Ashley Smith & The Random Occurrence
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MAY La Lucha
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