

Sales Roundtable

SHARPEN YOUR
NEGOTIATION SKILLS
 FOR A WIN-WIN OUTCOME



IBAW.com
 INDEPENDENT BUSINESS ASSOCIATION OF WISCONSIN
 SALES ROUNDTABLE

DATE	TIME	LOCATION
MONDAY FEB. 12TH	8:00 AM - 9:30 AM	VON BRESSEN TRAINING CENTER WAUKESHA

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VIP MEMBER ONLY
 FREE ENTRY

Monday, February 12th

WI Monthly Business Meeting

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FRIDAY, FEB 16TH
 7 AM - 9 AM
 THE WISCONSIN CLUB, 900 W. WISCONSIN AVE. MILWAUKEE


CLIMATE CHANGE
 FACT? FICTION?
 OR SOMETHING IN BETWEEN?

IS THE EARTH HEATING OR COOLING AND WHAT ARE THE FACTS?

You see it on the news and all over social media; climate change ravages the Earth and impacts everything from hot summers to snowy winters, wildfires, droughts, flooding, and hurricanes.

But what is really going on here?

Is the climate changing, and, more importantly, is man at fault, or is it occurring naturally?



Register at:
IBAW.COM

PRESENTER:
 STEVE EINHORN

Friday, February 16th

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 FINDING YOUR SQUAD



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KEATING:
 U.S. ECONOMIC AND
 POLICY OUTLOOK
 FOR 2024



BOBOWSKI:
 DELEGATION PROCESS
 FOR GROWTH




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IBAW Mission:

To advance business prosperity through insightful programming, executive networking and member-driven public policy and advocacy.

Sales Roundtable

Monday, February 12th, 2024 | Time: 8:00 am - 9:30 am

Location: Von Breisen Training Center, 20975 Swenson Drive, Suite 400, Waukesha

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Having solid negotiating skills is a must not only in a business setting but in your personal life, too. Negotiation is not always about money. In fact, having strong negotiation skills are vital to resolve conflicts, manage crises, and prevent potential disputes from escalating.

At this Roundtable we'll share - as a group - the lessons all of us have all learned along the way on how to maintain a strong position but be able to be flexible so everyone wins. We'll also talk about how to prepare for a negotiation setting, the due diligence needed ahead of time, and tips to ensure an outcome benefits everyone - but tips in your favor.

*Note: Sales Roundtable is a free event but you must be an IBAW member to attend.



**Register at
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“ ... Sales Roundtable is a great place to send my sales and marketing team, it's easily worth the price of membership on its own. ”

Wisconsin Monthly Business Meeting

Friday, February 16th, 2024 | Time: 7:00 am - 9:00 am

Location: Wisconsin Club Ballroom, 900 West Wisconsin Ave. Milwaukee

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This month, we'll hear from **Steve Einhorn**. Mr Einhorn is a businessman, entrepreneur, and Cornell graduate who had a natural curiosity on what climate change was all about. He'll delve into the various scientific and rhetorical thickets to sort out the claims and present them in a clear and concise manner. The answers will may surprise you. Join us!

LOCATION	THE WISCONSIN CLUB 900 W. WISCONSIN AVE. MILWAUKEE
7:00 AM	CHECK IN, COFFEE & NETWORKING
7:30 AM	BREAKFAST & PROGRAM
9:00 AM	PROGRAM ENDS

Advanced registration & payment is required.
Please, no walk-ins.

[Register at IBAW.com](https://www.ibaw.com)

The Future of Work: Trends and Solutions

Prashant Kothari, President, SkillBench Inc.



In a world marked by rapid technological advancements and a shifting talent pool, the future of work is undergoing a profound transformation. The traditional 9-to-5 office grind is increasingly becoming a relic of the past as remote work and hybrid workforces take center stage. The way we find, attract and manage talent is evolving to keep pace with these changes. In this article, we explore the future of work, the rise of remote talent solutions and the emergence of the hybrid workforce.

The remote revolution

Long before the COVID-19 pandemic, the utilization of remote talent gained momentum in the 1980s, primarily within IT and business process outsourcing. Technological advancements allowed workforces to operate from anywhere, offering cost savings through price arbitrage and the opportunity to tap into external expertise, which proved a prudent business strategy.

The COVID-19 pandemic acted as a catalyst for the global remote-work revolution, expediting an already growing trend. Companies worldwide swiftly adjusted to remote work, and many discovered its remarkable efficiency. Consequently, remote work has shifted from being merely a workplace perk to becoming a standard offering for numerous organizations.

Two pivotal forces underpin this transformation. Technology stands as a primary driver, with high-speed internet, cloud-based collaboration tools and digital communication platforms empowering employees to work from virtually anywhere. The resultant flexibility and potential for an improved work-life balance align seamlessly with the evolving needs of the modern workforce.

The second key driver is the shifting global workforce. A study conducted by [Purdue Global^{\[1\]}](#) reveals a substantial quarter of the U.S. workforce comprises baby boomers. To provide perspective, a staggering 10,000 baby boomers retire daily. Simultaneously, the United States has witnessed a stark decline in birth rates^[2] over the past half-century. The mass exodus of baby boomers, coupled with a relatively modest influx of Gen Z into the workforce, has created an increasingly formidable challenge for U.S. employers in their pursuit of finding, enticing, retaining and effectively managing talent.

Conversely, the eastern part of the world (the East) has witnessed a growth in its proficient English-speaking workforce due to rising birth rates and enhanced education. In 2023, India overtook China as the most populous nation.^[3] The sizable and accessible pool of skilled, cost-effective, English-speaking talent in the East has become appealing to U.S. employers seeking resources.

The rise of remote talent solutions

As remote work gains prominence and local talent shortages emerge, businesses are adopting remote talent solutions to source and oversee their workforces. These solutions encompass a range of tools to facilitate remote recruitment, onboarding and collaboration, enabling access to a global talent pool. The Big 4 accounting firms were early pioneers in leveraging this global workforce trend across various functions, such as client services and back-office operations. In the realm of public accounting, firms increasingly utilize hybrid and remote workforces for tasks like accounting, bookkeeping, tax, audit and payroll. CFOs and controllers also harness remote and hybrid workforces for various accounting and finance functions.

Moreover, remote talent solutions provide essential tools for effective remote team management, including project management software, virtual team-building activities, and digital communication platforms. Work models have been adapted to accommodate remote workers in different geographic locations, including those overseas.

Article continues ↓

The hybrid workforce: Finding the right balance

Remote work offers benefits, but it has challenges, too – such as isolation, blurred work-life boundaries and reduced in-person collaboration. Many firms are adopting a hybrid workforce model, enabling both remote and in-office work. This model offers flexibility and retains the social and collaborative office aspects. Hybrid offshore talent pools provide the best of both worlds, addressing talent shortages and offering office-based and remote work options.

The impact on company culture

In the era of remote and hybrid work, a major concern for businesses is preserving company culture. How can a sense of unity be maintained with employees spread across different locations and time zones?

To tackle this challenge, companies are adopting innovative methods to foster belonging among remote and hybrid workers. This includes virtual team building, regular video meetings and digital platforms for sharing accomplishments, which cultivates a shared culture and values.

Effective communication is even more vital in this new setting. Companies must ensure all employees, regardless of their location, have equal access to information and collaborative opportunities. Transparent communication and equitable treatment of team members are essential for a healthy and inclusive company culture.

The future of work is flexible and inclusive

The future of work is undoubtedly moving toward a more flexible and inclusive model. Remote talent solutions – driven by technological advancements, a shifting global workforce and the lessons learned during the pandemic – are reshaping how businesses find and manage their workforces. The rise of remote work and the adoption of hybrid workforces are here to stay, offering employees greater flexibility and employers access to a wider and cost-effective talent pool.

To succeed in this new era, companies must adapt and embrace these changes. Emphasizing the right balance between remote and in-person work, leveraging remote talent solutions, and nurturing a strong company culture are all crucial steps toward ensuring a prosperous future for both businesses and their employees.

As we continue to navigate this evolving landscape, one thing is clear: The future of work will be characterized by flexibility, adaptability and a commitment to harnessing the full potential of a diverse and dispersed workforce.

" This article was first published in On Balance, the bimonthly magazine of the Wisconsin Institute of Certified Public Accountants (WICPA), and is used with WICPA permission."

Prashant Kothari is president of SkillBench Inc. He has more than 25 years of experience sourcing, screening, hiring, deploying and managing offshore talent. Contact him at prashant@globalskillbench.com or 414-364-8955.

^[1] <https://www.purdueglobal.edu/education-partnerships/generational-workforce-differences-infographic/>

^[2] <https://www.usnews.com/news/health-news/articles/2023-01-10/u-s-birth-rates-continue-to-fall>

^[3] <https://www.un.org/en/desa/india-overtake-china-world-most-populous-country-april-2023-united-nations-projects>

Why a Management Team Should Always Be Talking About M&A



Tammie Miller, Managing Partner, TKO Miller

As an M&A professional, I am often met with the stigma from others that I can only be useful to a business owner when they are looking to sell a business; that a relationship with me is come-and-go as needed, call me when the time is right.

I would like to make the case that engaging with, and regularly speaking with, people like myself on a regular basis can create more value than waiting until it comes time to transact.

I read once that one of the greatest public affirmations a company can make is when they engage in an M&A transaction. Why? Because it is a declaration to the world that a company is doubling down on something, that it is adding something that it cannot do itself, the urgency of the situation was worth the risk of price, integration, execution, or scope to go-it-alone or greenfield a new project. It can also mean that the company needs to pivot completely from their existing strategy. An example of the high profile transactions like this recently is Microsoft and ChatGPT: competitors were instantly on their back foot, and Microsoft had access to a completely new market.

Sometimes an acquisition is a natural fit because of industry; it can be a vertical integration or consolidation; expanding to an adjacent geography; combining similar product portfolios; creating synergies or value due to newfound scale and relationships with suppliers or vendors.

Whatever the reason for making this very public decision, the M&A market is an ever-changing landscape that provides insights for business owners, whether you are considering a near term transaction or not, into what your competitors are doing to create value for their business.

Including strategic discussions about the relevant M&A markets as a regular part of business strategy allows management teams to address long-term prospects or problems. M&A provides real-time insight into the strategic decisions and the direction companies in your industry or geographic region are facing. It can provide discussion topics about customer or vendor needs; product and service categories; competitive barriers and cost saving metrics. It can also provide the important

“devils advocate” as you compare your own strategic initiatives.

So what does this have to do with a business owner’s relationship with an M&A professional?

As a trusted advisor, it is our responsibility to know the current state of the M&A landscape, so at the very basic level we are aware of trends and valuations, but there is so much more to it.

As we work with businesses either looking to acquire or be acquired, we talk not only with our own clients, but with many different buyers, investors, or companies looking to assess how an acquisition would fit that very strategic vision I mentioned earlier.

Our hands-on experience gives up to the minute insight into the broader strategic considerations of anybody looking into the industry or company. Beyond just answering, “why did Microsoft buy such a large stake in ChatGPT?” we can address the very nuanced operational and strategic considerations that go behind such a big decision.

Our work with middle-market companies almost always gets into the weeds on expansion capabilities, operational structures, supply chain optimization, sales team strategies, and so much more. And that is before we even approach a potential investor or buyer in the marketplace, each with their own strategic vision and concerns. Of course, we can never speak specifically about something shared with us in confidence, but the industry portrait that an M&A advisor has access to on a daily basis far exceeds the generic and high-level industry trend information a consultant or research report can offer.

I would encourage everybody to have a conversation with an M&A professional on a regular basis, especially if they see a deal announced in their industry. You can ask questions that even on the surface give insight into the broader landscape required to make sound business decisions and address the needs of all stakeholders of your business. Any M&A advisor would be happy to hear from you and none of the good ones will charge you anything until you actually engage them.

How to Promote Your Brand as a Top Contender in Your Industry

Scott Seroka, CEO, Seroka Industrial Branding



In 17 seconds: You need to ensure your brand immediately comes to mind when a potential customer needs what your company manufactures. You can significantly improve your chances of being top-of-mind by:

1. Making sure your brand is properly differentiated
2. Asking for testimonials
3. Highlighting your competitive advantages
4. Leveraging video marketing
5. Approaching the media to seek opportunities for interviews
6. Create a blog replete with relevant content

Does your brand immediately come to mind when potential customers need what your industrial company sells?

Let's assume for a moment that you need to buy a new CRM system for your company. You'll likely think of the dominant brands in the CRM space like HubSpot, Salesforce, and Pipedrive.

And for good reasons – they've all worked hard to earn a top-of-mind position with CEOs, business owners, IT professionals, marketers, salespeople and others involved in researching and purchasing CRM software. You could almost say they all fall into "the obvious choice" categories and "you can't go wrong with any of them." You know where I'm going with this.

Question: If someone needed to buy what you sell, are you confident your brand would immediately come up as a top contender in the minds of your prospective customers? In other words, do you have good brand awareness?

If so, you're doing many things right, and you also know how difficult it is to maintain that top-of-mind brand awareness position.

If not, it will be a bit of a steep hill to climb, but the steps in this article will help your brand get there faster. In nearly every industry, there are usually one or two brands people perceive as being the best – the brands people knowingly pay a premium for because being associated with the best not only makes a statement, it also makes existing customers loyal customers.

In close proximity to the "best" brands are runner-up brands that are often 95% as good but typically cost substantially less. And then, of course, there is "everyone else" – those mediocre-to-low-quality brands for buyers most interested in finding a bargain – a crappy place to be.

Article continues ↓

In highly competitive and oversaturated industries, achieving runner-up status is no small feat and one to be very proud of. For example, in the camera industry, Leica and Hasselblad may be the brands many photographers and enthusiasts aspire to purchase, despite their intimidating price tags.

However, most professional photographers are very pleased with the performance Canon, Nikon, Fujifilm, and SONY cameras provide, all of which could be categorized as runner-up brands in the industry.<https://serokaindustrialbranding.com/the-latest-7-best-practices-for-video-marketing-plus-a-bonus/>

In the tool industry, Snap-On may be perceived by many mechanics as the premier brand, but many find that Mac Tools and Matco Tools are just about as good and cost less.

If you're confident that your brand is MUCH better than it is currently perceived to be, there are several things you can and should do to elevate your rank in the hearts and minds of the customers you know would benefit from what you manufacture.

- [Make sure your brand is properly differentiated](#) so that your target audience clearly understands precisely why they need to buy from you instead of from your competition. Click [here](#) if you need help with this.
- Ask your customers if they would be willing to provide you with a written or video testimonial to post on your website and social media channels, such as YouTube and LinkedIn. To increase your chances of getting a "yes," offer to write or script the testimonial for them. With this approach, you'll be amazed at how willing your customers will be to help you. Testimonials from customers build brand credibility and brand consideration almost instantly.
- Ensure that you provide a clear and unbiased comparison of your products to those of your competitors, and highlight those areas where your product offers a better value to end-users under different applications.
- Provide a short and engaging [product demo video](#) so potential customers can view how your products perform and operate under various situations.
- Approach the media to seek opportunities for interviews, and offer to write a feature story about how your brand, business, or product is unique and superior to others in your industry.
- Create a written or video blog (vlog) and speak to your customers' interests. When people understand how you think and witness your body language through a video, it helps to build trust and respect. A written blog is strong, but a vlog is even stronger.

Next ...

Plug these components and assets into a well-rounded, comprehensive [marketing strategy](#) to build brand awareness with the theme, Why (insert your company or product name here)?

This will really be the only path to positioning your brand as a top contender in your industry, but it can only be accomplished if you have a [well-defined and compelling brand](#)

You'll need to leverage various marketing channels and tactics to reach your current and prospective customers while keeping your current customers engaged. Some key components of a successful marketing strategy include:

- Market research to understand your audience's needs, preferences, and pain points. This will help you tailor your efforts to address each and establish a strong connection with the people you need to reach.
- Competitive assessments to assess your competitors' brand positioning, brand messages, blog activity, and what they're up to on social media. You need to know who you are up against in the field and how your brand is unique and superior.
- SMART Goal Setting (Specific, Measurable, Achievable, Relevant, Time-Bound) for your marketing efforts to track progress, make data-driven decisions, and optimize your strategy for better results.
- Choosing the right marketing channels based on your buyer personas, budget, and marketing objectives. Channels may include your social media accounts, email marketing, content marketing, search engine optimization (SEO), PPC, paid advertising and other marketing tools to help elevate your brand awareness.

Article continues ↓

Build your content marketing strategy

When you master the art and science of creating a strong [content marketing strategy](#), you'll have a powerful marketing tool to facilitate the process of positioning your brand as an authority and top contender in your industry. Content marketing will drive organic traffic to your website in the spirit of engaging your target audiences.

Some effective content marketing tactics to consider include:

1. Email: No, it's not dying. In fact, quite the opposite. It still holds its position as a top content marketing tool.
2. Blogging: Regularly publish high-quality, high-value blog posts that address your customers' needs and challenges. A solid, optimized blog post drives traffic and leads to sales.
3. Webinars and Workshops: Host educational webinars or workshops to share your knowledge and skills with your audience. This can help you build a loyal following and generate leads for your business.
4. Social Media Posts: Share your content on social media platforms where your target audience is most active. Engage with your followers, respond to comments, and participate in relevant discussions to foster a sense of community around your brand.
5. [Video](#): Ideal for demonstrating products, delivering tutorials, providing answers to FAQs, and making sales, video marketing should be your best friend.
6. eBooks: Looking for an excellent way to improve lead generation and boost brand credibility and loyalty? Authoring and publishing eBooks will further position you as a thought leader in your industry.
7. Infographics: These provide an easy way to convey important information to your target audience. It's a known fact that the human brain recognizes, perceives, and remembers visual content much faster and more effectively than text. This explains why images in social media posts substantially outperform pure text posts.
8. Case studies and success stories: Sharing your successes is one of the most effective ways to prove that you and your company can solve customer problems.

Monitor and Continuously Adjust Your Strategy

Keep your eye on those key performance indicators (KPIs), like website traffic, social media engagement, email open rates, conversion rates, etc., to identify what's working and what needs improvement.

Run A/B testing with alternative tactics to see which outperforms the other. This will give you infinite opportunities to continuously improve your marketing campaigns. How's that for marketing ROI?

Does all of this seem like a lot? It is, but even if you do half of what is suggested in this article, you'll be doing much more than many industrial companies. The time is now to take the lead and elevate your brand in the minds of people who need your products.

Scott Seroka is CEO of Seroka Industrial Branding. He can be reached via email by [clicking here](#).

UPDATE

Celebrating School Choice Week: *Apples to Apples* & Legal Updates

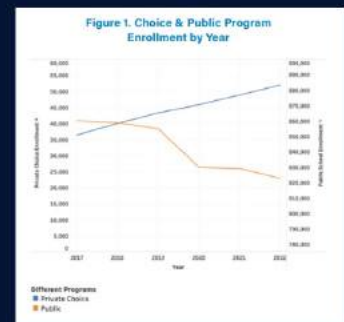
**IBAW Member & Legal Advocate,
Wisconsin Institute for Law & Liberty,
recently hosted an ONLINE Webinar
update on Wisconsin's School Choice
Program.**



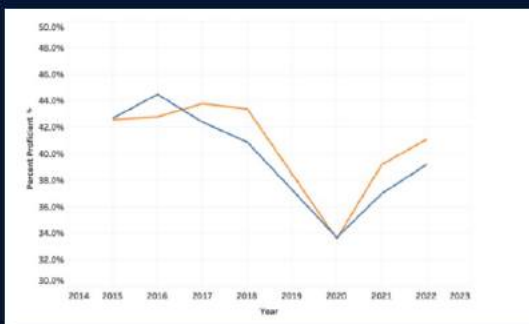
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[To watch the video, click here.](#)

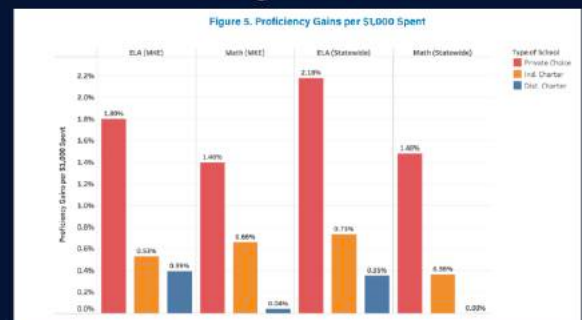
School Choice Enrollment Over Time



State of Student Proficiency



Other Findings: School Finance



Delegation Process for Growth

Steve Bobowski, Dale Carnegie Training



Dear Carnegie Coach Bobowski:

I recently had my yearly review. During the review my supervisor told me that I need to delegate so I can focus on larger tasks and projects. I was not given specifics so I'm unsure where to start. What tasks should I delegate and whom I should delegate them to? How should I approach this whole process?

Thank you for your guidance,
Janet

Dear Janet,

Congratulations on your yearly review! Exploring delegation as a means to focus on more significant tasks and projects is an excellent step towards both personal and team growth. To guide you through this process using the Dale Carnegie Training Delegation Process, here are some steps with practical examples:

Selecting the right person: Identify someone eager to learn and grow within the team. For instance, if you've noticed Sarah's enthusiasm for taking on new challenges during team meetings or her interest in up skilling, she could be an ideal candidate.

Identification of tasks: Consider tasks that have been challenging for you recently and align with the growth trajectory of the selected person. For example, suppose you've been finding it time-consuming to manage social media updates. In that case, this task could be an excellent opportunity for Sarah to learn about social media management and contribute to the team's digital presence.

Delegation, not dumping: Before handing over the social media management responsibility, explain to Sarah how it's a chance for her to develop new skills in content creation and scheduling, which could be beneficial for her career growth. Highlight how her contributions will also ease your workload.

Setting goals together: Sit down with Sarah to craft an action plan. Define clear goals for her, such as creating three engaging social media posts per week, tracking their performance, and proposing new content ideas. Establishing these short-term objectives will help both of you monitor progress effectively.

Coaching and guidance: Offer Sarah guidance by walking her through the process initially. Share tips on creating compelling content, using scheduling tools, and analyzing engagement metrics. This hands-on approach ensures she feels supported and confident in her new role.

Follow-up and celebration: Schedule regular check-ins to review Sarah's progress and offer feedback. Celebrate her achievements, whether it's reaching engagement targets, implementing new creative ideas, or improving social media performance.

Action Steps: Follow the 6 delegation steps we used in delegating Social Media to Sarah.

The Benefit to You, the Delegated to, and the Company:

- You will free up your time to focus on larger items for Personal and Company growth.
- And the benefit to the Delegated to will be to empower them to develop new skills and contribute meaningfully to the team's objectives.

Make It A Great Day!

Steve

The Importance of Finding Your Squad

Lisa Rasmussen, Client Relationship Connector, KnotMagic



Searching for Your Squad

A squad can help you re-ignite your passion, fuel your ambitions, and refine your career and life.

They can help you define your goals, be your support system, and help you navigate the complexities of work and life. However, it's not always easy to find the right group, and it requires both investment and intention.

When I began my own assessment of where I was spending my time, I realized I was looking for more than just surface-level networking and business card exchanges. Networking groups, like IBAW, are a great way to start building purposeful relationships with individuals with similar challenges, opportunities, and drive. Connecting beyond traditional events also helps nurture meaningful conversation and deepen relationships. The small group I joined helped me build my own powerful board of directors who helped me navigate the pandemic and other challenges with strength and gratitude. The relationships I fostered over the last five years didn't happen overnight, and I attribute the success to the following factors.

Honor Your Commitment

A big part of networking is showing up. Early on, we planned a time and location for the group to meet monthly. Scheduling conflicts will always happen when trying to align calendars, but planning ahead provides the best chance for busy people to coordinate with partners and workplaces or arrange childcare. It can be tempting to move the meeting when someone can't attend, but that can often lead to additional conflicts and make it harder to ensure commitment over time. Be understanding of seasons that may impact attendance and check in with those who are navigating chaotic work and life circumstances.

Getting there is half the battle, but being present will help you reap the rewards of multi-faceted relationships. Setting a framework has helped provide a structure for our time together.

A facilitator schedules our meetings and shares the agenda, but we all take responsibility to ensure the meetings happen and the group stays engaged.

Go Deeper

We also committed to fostering an environment of vulnerability. Starting meetings with a meditation or inspiring article gets us in a reflective mindset and sets the intention for our discussion. We assign a moderator to ensure we stay on task and everyone can contribute their personal reflections and thoughts on the selected topic. Each person communicates whether they are looking for feedback or just want the space to share what is on their mind. This has helped us practice listening without trying to solve, and asking for feedback in this safe place has led to growth for us all. Knowing the time you carve out will be time well spent has been an impactful part of this group's success.

It's pretty amazing that these individuals find the time between family obligations, demanding jobs, and philanthropic commitments. The vulnerability we have fostered has led us to a place where we can ask for help or be honest when we don't know what step to take next. We all experience seasons where it is hard to get ahead, and having a tribe in your corner is an essential part of pushing through.

Article continues ↓

Additional Tools / Best Practices

Committing to the meeting, being present and transparent are critical for meaningful interactions, but there are a myriad of other tools that can make finding and maintaining your squad easier.

- Start a group text for quick communication outside meetings.
- Embrace inevitable changes (jobs, commitment level, personal obligations, new members, etc.)
- Use tools like Doodle to simplify scheduling.
- Leverage happy hours and book discussion guides to foster openness.
- Deviate from the plan when circumstances warrant it.
- Have fun. Humor is a great way to build relationships.
- If the group isn't jiving, be honest with yourself and try again.

Personal Impacts

Diverse perspectives from a network in varying industries and organizations have provided valuable insights, encouragement, thoughtful feedback, empathy, and laughter. Maintaining an intentional group of committed individuals can help triage challenges in a way that might be challenging for others in your life. Consider if having a sounding board to help break things down or build you up could be the solution to catapult you forward or lead to additional fulfillment where you are now!

If you want to know more about building a squad or want to connect, feel free to LinkedIn with Lisa Rasmussen.

U.S. Economic and Policy Outlook for 2024

Ray Keating, Chief Economist, SBE Council



The resiliency of America's private sector has been on full display over the past four years, with entrepreneurs, businesses, investors and workers leading our country and economy through a pandemic and its related government shutdowns, a brutal recession, and the battle back.

Perhaps the most amazing aspect of this has been evidence that the fires of entrepreneurship still burn bright in the U.S. despite many challenges and obstacles.

This is clear in the recent trend in new business application. So, let's update and expand upon an SBE Council look at entrepreneurship numbers from a few months ago.

Business Creation and Starts are Higher

Average monthly business applications never hit 250,000 in a year from 2005 (start of the U.S. Census Bureau's dataset) to 2016. In 2017 and 2018, the monthly average moved up to just over 290,000. And then in 2020, with the onset of the pandemic, the monthly average actually jumped to 365,230, and then subsequently have topped 400,000, coming in at approximately 449,000 in 2021, 421,000 in 2022, and 454,000 in 2023 (latest report [here](#)). Of course, the question is how many of these applications actually turn into businesses.

The Census Bureau's employer and nonemployer [data](#) suffer considerable lags. In terms of employer firms, there were 6,102,412 in 2019, and that moved to 6,140,612 in 2020, and to 6,294,604 in 2021. So, we did see growth in the number of employer firms during the pandemic, which is amazing.

As for nonemployer businesses (i.e., one-person businesses), in 2019, they registered 27,104,006, and then came in at 27,151,987 in 2020. The 2021 data are not yet available, but, again, we saw growth from 2019 to 2020.

In addition, the Bureau of Labor Statistics publishes a "Business Employment Dynamics" report, with the [latest](#) covering the first quarter of 2023. That report includes quarterly births of new establishments. It should be noted that establishments include different locations for the same business. At the same time, though, new establishments will capture new firms as well, including one-person businesses. Unfortunately, there's no real way to pull this apart, that is, until the Census's new firms data catches up. Even with limitations, there obviously is value in this BLS data.

In the first quarter 2023 (latest data), establishment births (seasonally adjusted) registered 331,000. That followed on 344,000 in the fourth quarter 2022, 349,000 in the third quarter, 365,000 in the second quarter, and 349,000 in the first quarter. In 2021, the numbers again were above 300,000 in each quarter (308,000 in the first quarter, 351,000 in the second quarter, 359,000 in the third quarter, and 378,000 in the fourth quarter).

The latest two years with complete data - that is, 2021 and 2022 - are the only years in which the quarterly levels ever topped 300,000. And this dataset goes back to 1993.

Interestingly, the latter half of the pandemic year of 2020 saw high levels of establishment births as well. The first quarter 2020 came in at 278,000, which at that point was a quarterly high for the data. The second quarter, which captured the fuller impact of the pandemic, saw births drop to 228,000 (deaths jumped to all-time high of 327,000 as well - more on deaths shortly). But third quarter births jumped back to 277,000 and then to 287,000 in the fourth quarter.

As a comparison, looking at pre-2020 quarterly numbers from 2015 to 2019, for example, establishment births ranged between 233,000 to 269,000. So, we definitely see a link between the jump up in new business applications and an increase in establishment births.

By the way, establishment deaths also have risen, particularly from the second quarter of 2021 (22,000) through the second quarter of 2022 (322,000), which is the latest period with deaths data. The pickup in deaths is expected with the rise in births, as entrepreneurship is an endeavor rich with risk and uncertainty, and failure is not unusual. The key is to see robust births, with deaths lagging well behind births, as has been the case post-pandemic.

Again, the spirit of enterprise lives on among Americans. Indeed, entrepreneurship stands out as one of America's clear competitive advantages.

So, what should current and emerging entrepreneurs, businesses in general, investors and workers be looking at in 2024 in terms of economic and related trends that will impact their businesses to varying degrees?

Unfortunately, entrepreneurs will, once more, lean heavily on their persistence, resiliency and courage as 2024 seems destined to be jam-packed with questions and uncertainties. For example, there either are no easy answers to the following issues and questions, or the answers might not exactly be productive.

The Inflation Factor

Will inflation prove sticky or will it be brought further under control? And tied to that question is:

Does the Fed have a clue as to what it's doing in terms of manipulating interest rates, and will it get serious in removing a key source of uncertainty, which has been the unprecedented explosion in the monetary base (currency in circulation plus bank reserves) since 2008?

It seems to me that inflation has come down thanks to the private sector healing, innovating and expanding supply chains, rather than much that the Fed has done. Looking ahead, let's hope that the Fed limits its missteps, while the private sector continues to work its magic.

Economic Growth

At best, the U.S. economy could return to its post-2007 track record of under-performing economic growth, or at worst, we could see a recession in 2024. Either way, does anyone in Washington, D.C., offer or show serious interest in a clear growth agenda, which would necessitate substantive and permanent tax and regulatory relief; advancing free trade; and reining in

federal spending (which is projected to persist at record peacetime levels for the foreseeable futures, thereby draining resources from productive private sector undertakings)?

Population and Immigration

The U.S. faces slowing population growth and an aging population, which creates serious economic woes in terms of unmet labor needs up and down the skills ladder, and in terms of lost entrepreneurship. Technology, of course, can help, but these population/labor market challenges are undercutting growth now, with more severe costs down the road given diminished entrepreneurship and innovation. Again, is anyone on the public policy landscape taking this seriously, and offering reforms, in particular in terms of immigration, that will help – or is this merely an issue to be used as a political weapon to fuel one's base?

U.S. Global Leadership on Trade

International trade is an essential source of growth, including in terms of expanding opportunities for entrepreneurs, businesses and workers. Will America's policy leaders recapture economic clarity on this issue, and get back to the U.S. leading the way in reducing governmental barriers to trade, or will recent protectionist inclinations persist? Judging by the points being made by leading presidential candidates, my hopes don't run high.

International Conflict

The world is an increasingly dangerous place, especially with the U.S. stepping back in various parts of the globe, and that's not good news for business and the economy. Russia's war against Ukraine, China's economic challenges and threats against Taiwan, and Israel's response to terrorist attacks and the Middle East in general make for a concerning list that could create additional humanitarian tragedies and economic problems in the coming year and beyond. Freedom and peace are good for people and for commerce, and the U.S. needs to clarify and strengthen its voice and role in the world to advance freedom and peace.

These are serious issues and questions. Unfortunately, and perhaps ironically, sober assessment and productive responses are likely to be in short supply given that 2024 is both a presidential and congressional election year.

Private Sector Innovation Continues to Respond

However, among the positives that will help in some of these areas is private sector investment and innovation on the technology front, including advancements in telecommunications, computer speed and power, AI, the metaverse, and more.

In turn, that will expand opportunities for entrepreneurs to gain access to capital and new markets and consumers, to improve operations and customer service, to create new goods and services, to start up and expand businesses, to create new job opportunities for workers, and to improve our quality of life. But even innovation is threatened by misguided government policies, such as antitrust policy that ignores market realities and focuses on attacking U.S. global technology leaders.

Indeed, the free enterprise system should make us all optimistic about the coming year and far beyond. We just need for policymakers to stop erecting obstacles and increasing the costs of working, entrepreneurship and investing, and instead provide a sound foundation for growth.



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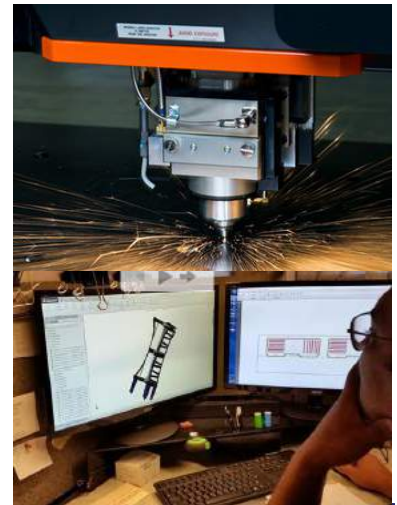
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Articles submitted by our members & sponsors.

2022 Policy: A Pro-Entrepreneurship, Pro-Small Business Agenda

Ray Keating, Chief Economist, SBE Council

Americans and our economy, along with the rest of the world, were hit by what proved to be a deadly pandemic in early 2020. That was nearly two years ago, and more than 821,000 lives have been lost due to COVID-19 in the U.S. alone (according to the Johns Hopkins [Coronavirus Resource Center](#) as of December 29, 2021). Perhaps now might be a good time to start advancing constructive policies that will actually support economic, income and employment recovery and growth.

Private Investment and Business Growth are Critical to Recovery


As we continue to work to regain some true normalcy, entrepreneurship, business and private investment have played, and will continue to play, central roles in this effort. But you might miss that if you just paid attention to our politics. Indeed, even during a pandemic, it's kind of been politics as usual, and sometimes in the worst, most divisive and pandering sense.

Among the strange undertakings by politicians have been efforts to impose higher taxes and to increase regulatory burdens, including price controls on pharmaceuticals and radical antitrust actions against leading technology firms.

These tax and regulatory actions are billed as being focused on big business - by the way, that doesn't make them any less harmful to the economy - but entrepreneurship and small businesses most assuredly would be damaged, including due to the fact that investors would see reduced opportunity for returns on investments that rank high in terms of risk and uncertainty.

Other counter-productive measures include protectionist trade policies, which only serve to raise costs for U.S. businesses (after all, nearly all imports are inputs to U.S. businesses) and consumers, while also reducing global opportunities for U.S. entrepreneurs, businesses and workers.

And then, of course, there's been a major push to jack up government spending. While many problems exist with such spending escapades, ultimately shifting resources away from the private sector to government is a recipe for more waste and inefficiency, and slower growth.



Finally, the Federal Reserve has been running loose money without precedent since the summer of 2008, that is, for more than 13 years. But now as we face red hot inflation, the Fed still seems to hold little interest in doing its primary job of maintaining price stability.

This is a policy mix seemingly designed to restrain or undermine our recovery.

Policies Must Work to Support the Private Sector

In recent [congressional testimony](#), I offered a framework for a very different direction on economic policy. Here is that agenda as outlined:

Avoid tax increases and provide tax relief.

Talk of tax increases seems to everywhere of late. So, why not raise taxes? Well, let's consider the fundamental problems with tax increases for the economy.

First, taxes drain resources from the private sector so they can be used in government. The problem here is that when resources are taken and used by government, it means they are being spent according to political incentives - such as being subject to special interest lobbying, being doled out according to the preferences of politicians, often being spent in ways that undermine work and risk taking in the economy, and being utilized to enhance power, staff and budgets in government. This, of course, means resources are being used far less efficiently than in the private sector - which in contrast is disciplined by prices, profits, losses, competition and consumer sovereignty.

Second, taxes affect incentives. Most troubling are taxes that affect incentives for the undertakings that drive economic growth, as has been emphasized here, entrepreneurship and investment, as well as working and saving. So, taxes that raise the costs and reduce the returns on such activities tend to be the most economically destructive taxes, and these include income taxes and capital gains taxes.

So, higher taxes always come with economic negatives. But raising taxes as entrepreneurs, businesses, investors and workers struggle to leave the pandemic economy behind, and get us back on a track of robust growth, is particularly misguided.

The policy focus needs to move away from counter-productive efforts to raise taxes, and instead look to

Article continues ↓

Articles by national speakers

Legislative Fix Moving Ahead for Wisconsin's New Manufacturing & Agricultural Credit

Jim Brandenburg, CPA, MST - Sikich LLP



In IBAW meetings and publications in recent years we have introduced you to Wisconsin's new tax incentive - the Wisconsin Manufacturing and Agriculture Credit (referred to as the "MAC"). The MAC came about in 2011 to provide an incentive for Wisconsin manufacturers and agricultural companies to remain and grow here, and also perhaps to have out-of-state companies move here. It was scheduled to begin in 2013, and when fully phased-in by 2016 it would essentially exempt any Wisconsin manufacturing and agricultural income from Wisconsin income tax. The MAC was championed by Representative Dale Kooyenga and Senator Glenn Grothman in the legislature.

The MAC, however, had some problems for individual taxpayers when it was drafted and this glitch was recently identified. Here is the issue in a nutshell: the MAC would reduce a taxpayer's Wisconsin individual income tax, but then would trigger a Wisconsin minimum tax for nearly the same amount. Thus, there may be little, if any, net savings for the MAC in 2013 (a "MAC Attack?"). The legislature is trying to remedy this situation now so that taxpayers can realize the proper tax savings with the MAC on their 2013 Wisconsin individual tax returns.

Legislative Update: It seems that all key legislative leaders are now on board to correct this issue. It was approved by the legislature's Joint Finance Committee last week. The Senate and Assembly will be in session in March and voting on final passage for several bills, one of which is this tax bill with the MAC correction. It looks like the legislative timetable will have the bill passed near the middle of the March, before going to the Governor. Thus, a best guess now is that the bill would be enacted into law somewhere in the latter half of March, 2014.

MAC Attack Options: For any of our individual taxpayers taking advantage of the MAC, this may present some filings logistics. Here are the possibilities:

1. Best case scenario - in some cases the taxpayer's share of the MAC for 2013 will be used and not result in a Wisconsin Minimum Tax. A taxpayer in this situation could go ahead and claim the MAC and file their 2013 Wisconsin individual return. There would be no need to wait for the legislation to pass.
2. Next, a taxpayer has generated a MAC for 2013, but it will trigger a Wisconsin Minimum Tax. The taxpayer in this case could wait until the law is changed (and then wait a little for the WDR to update its computer processing systems) and then file their Wisconsin tax return and claim the MAC, and not incur the Wisconsin Minimum Tax. This could present a tight timeline for the April 15 deadline, and you may need to file for an extension.
3. Similar case as #2, but this taxpayer could file their Wisconsin individual return with the MAC, but also incur and pay a Wisconsin Minimum Tax for 2013. Then, once the corrective law is enacted go back and file an amended 2013 Wisconsin tax return to obtain the proper tax benefit of the MAC. You would not need extend, but you would need to amend.

We'll keep you posted as this legislation moves forward.

If you have any questions, please contact Jim Brandenburg or Brian Kelley at Sikich, LLP in Brookfield (262)754-9400.

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