



MONEY TALKS:

YOUR TICKET TO A STRONG
EMPLOYEE OWNERSHIP
CULTURE

Zebulon LLC

May 2024

Small Business Development Conference

RESULTS YOU'LL SEE

AFTER TODAY'S SESSION:

Creating an

**EMPLOYEE
OWNERSHIP
CULTURE**

in your outfit



MORE ENGAGEMENT
... in your business's future



MORE MOTIVATION
... to do a job well done



MORE EMPATHY
... for your struggles as a leader



MORE MONEY

Dividends, raises, bonuses, benefits

YOU CAN CALL ME

ZEB.

- Certified Public Accountant, Bachelor's in Business Admin
- Speaker Nationwide
- “Most Innovative Practitioner”
2023 AICPA International finalist



YOU CAN CALL ME

ZEB.

- Fractional CFO
- Executive for Hire



WORK SMART. HAVE FUN. MAKE MONEY.

ZEBULON'S CLIENT BASE:

Downstream
adventures

Sierra  South

MOMENTUM  TREE EXPERTS

 **ROYAL GORGE
RAFTING**

 **ROYAL GORGE
VACATION RENTALS**

 **ROYAL GORGE
ZIPLINE TOURS**

WILDMAN
Adventure Resort

Imperial
RIVER CO.



ESTD 2005  CANON CITY, COLORADO 2005
WHITEWATER
BAR & GRILL
RAFT HARD. PARTY HARDER.



TODAY'S TALKING POINTS:

MONEY TALKS:

YOUR TICKET TO A STRONG
EMPLOYEE OWNERSHIP CULTURE



INTRODUCTION

WORKFORCE TRENDS

LEADERSHIP CULTURE

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CONCLUSION



THE STATE OF THE WORKFORCE

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Employees today crave

**MEANINGFUL WORK,
LONG-TERM STABILITY**

and roles that emphasize

WORKER WELL-BEING.





THE STATE OF THE WORKFORCE

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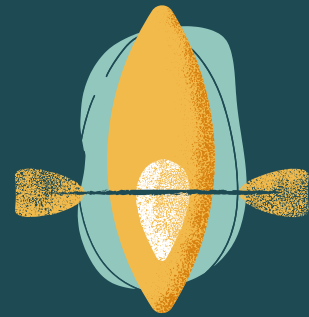
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EMPLOYEES

- Better pay
- Year-round stability
- More growth opportunities



EMPLOYERS

- Better-quality hires
- Accountability
- Reliability & retention
- **Concerns:**
Inflation & profitability



THE TONE AT THE TOP

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Those at the top of the organization should be **honest, show integrity**, and uphold an **ethically-correct** corporate culture.

The **tone at the top**, as the name implies, starts at the top and **TRICKLES DOWN** into middle management and eventually to the bottom line.

A company with a poor tone results in a company that is more likely to: Display **UNETHICAL BEHAVIOR**, engage in **FRAUDULENT ACTIVITY**, and **NOT SUPPORT INTERNAL CONTROLS.**





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Source: Corporate Finance Institute

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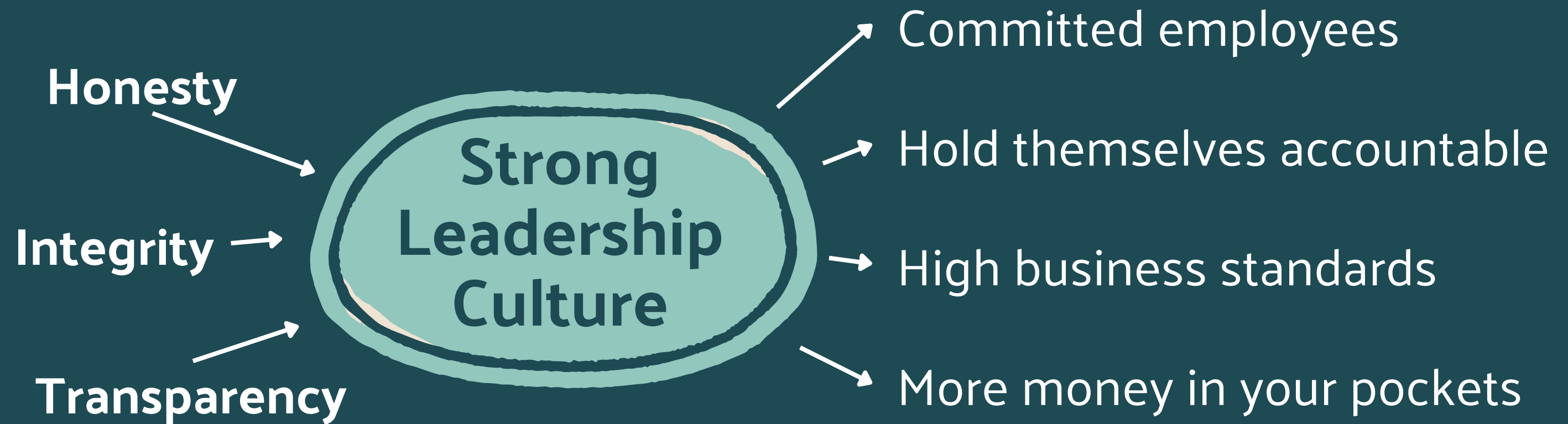
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THE TONE AT THE TOP



EMPLOYEE OWNERSHIP CULTURE

- What **employees** want
- What **employers** want



PASSIVE OR PROACTIVE

(Taking no action IS an action)

- Passive = Majority of cultures
- Proactive = You define the culture you want for your business

**Leaders:
IT STARTS
WITH YOU**



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In a world of uncertainty, financial stressors, and organizational upheaval, creating a

CULTURE OF OWNERSHIP

among your employees can go a long way to ...

- **IMPROVE FINANCIAL WELL-BEING,**
- **BUILD LOYALTY, and**
- **BECOME MORE PRODUCTIVE, ENGAGED WORKERS.**



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EDUCATE



COMMUNICATE



DELEGATE



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COMMUNICATE



DELEGATE



EDUCATE

- Be transparent & open
- Debunk “guide math”
- Share the business reality



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EDUCATE



DELEGATE



COMMUNICATE

- Be clear & consistent
- Actions directly impact pay
- Psychological safety
- This is a two-way street



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EDUCATE



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DELEGATE

- Let them show you what they're made of
- Let them prove they can elevate your business



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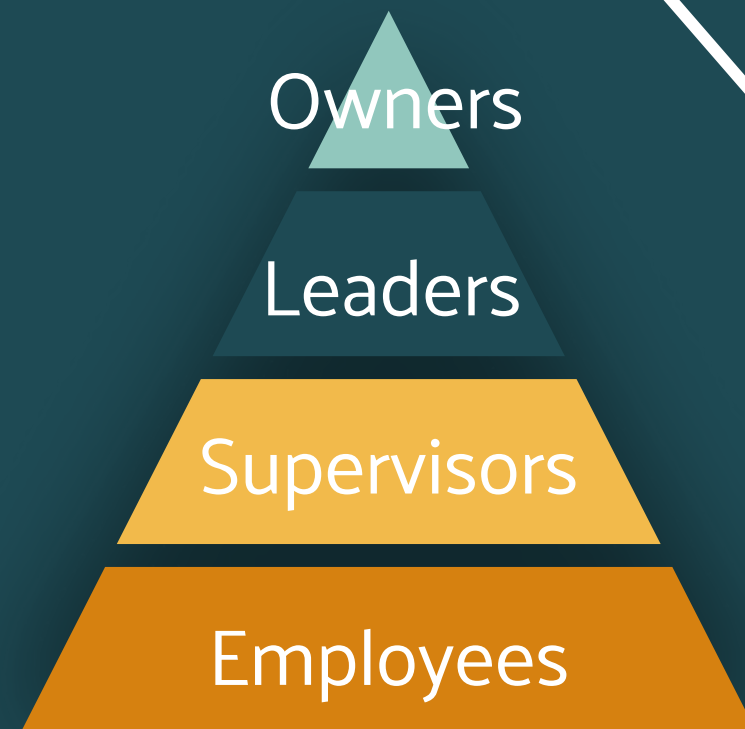
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OWNERSHIP PYRAMID



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COMMUNICATE



DELEGATE





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100% SUCCESS RATE

“This is exactly what we did this year and it had a noticeable impact. Not only to our **bottom line**, but to my **peace of mind**.

Just knowing that when my managers made decisions they took into account the **financial impact** along with risk management, guest satisfaction, and other core principals, was a **huge weight off my shoulders.**”



**ARKANSAS RIVER,
COLORADO**



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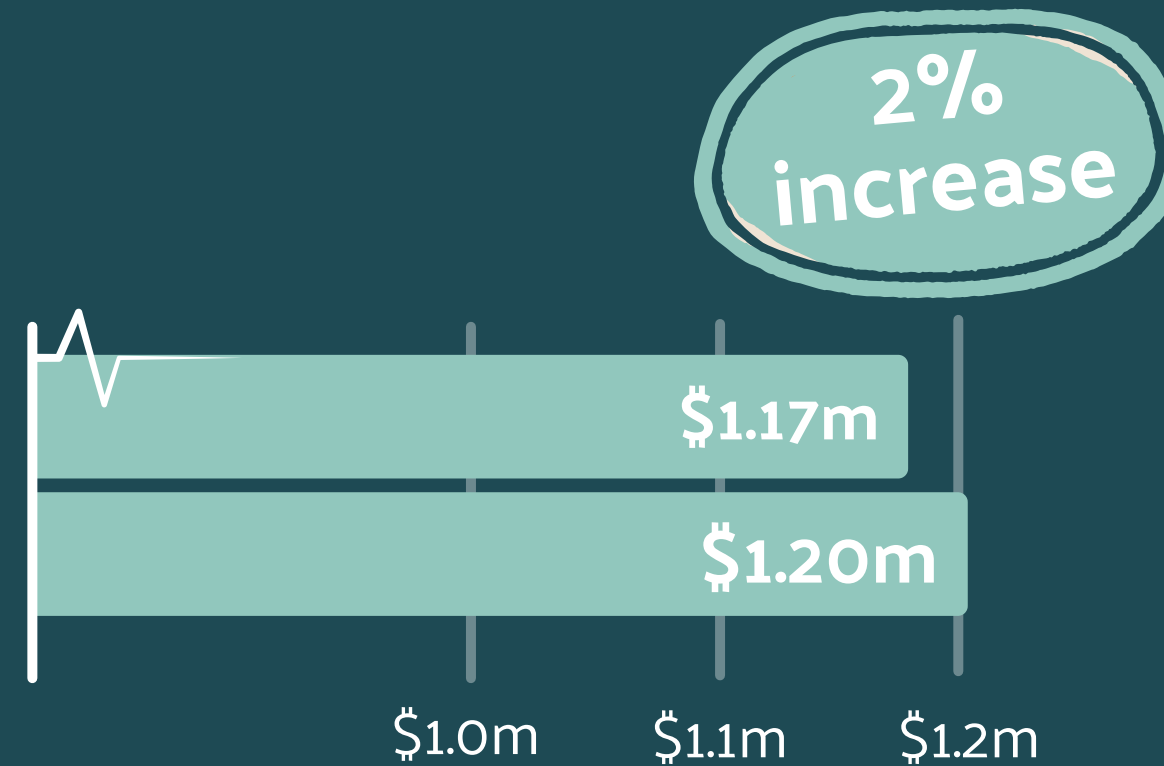
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100% SUCCESS RATE

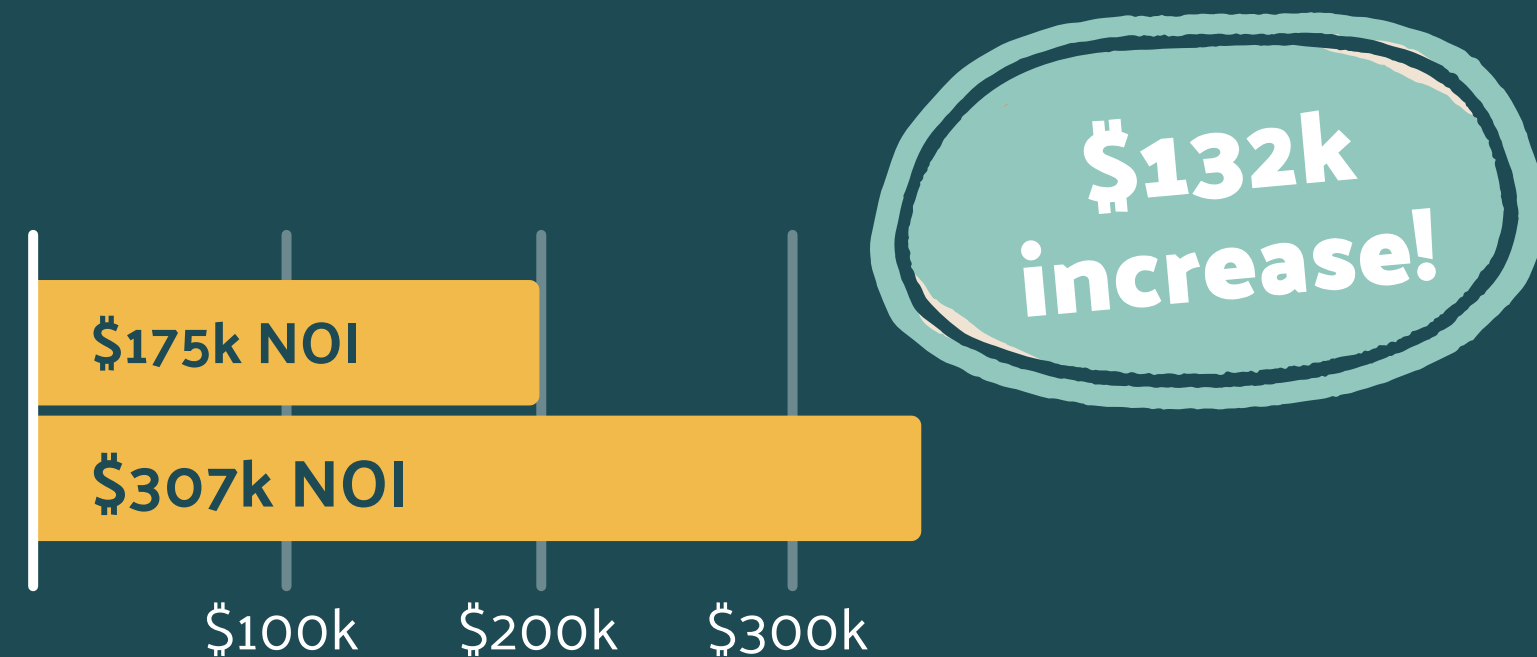
REVENUE:

Pre-adoption
Post-adoption



NOI:

Pre-adoption
Post-adoption





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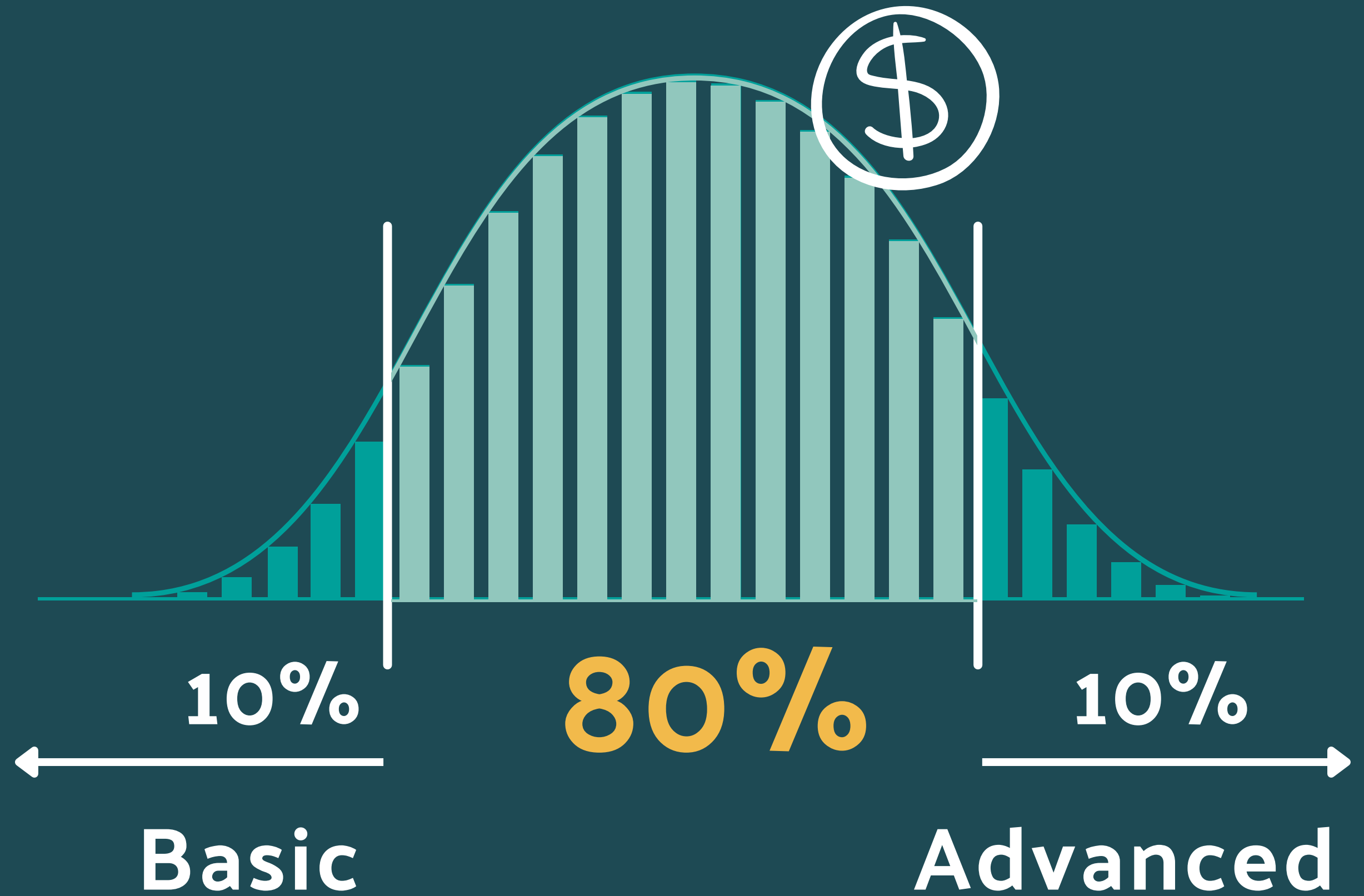
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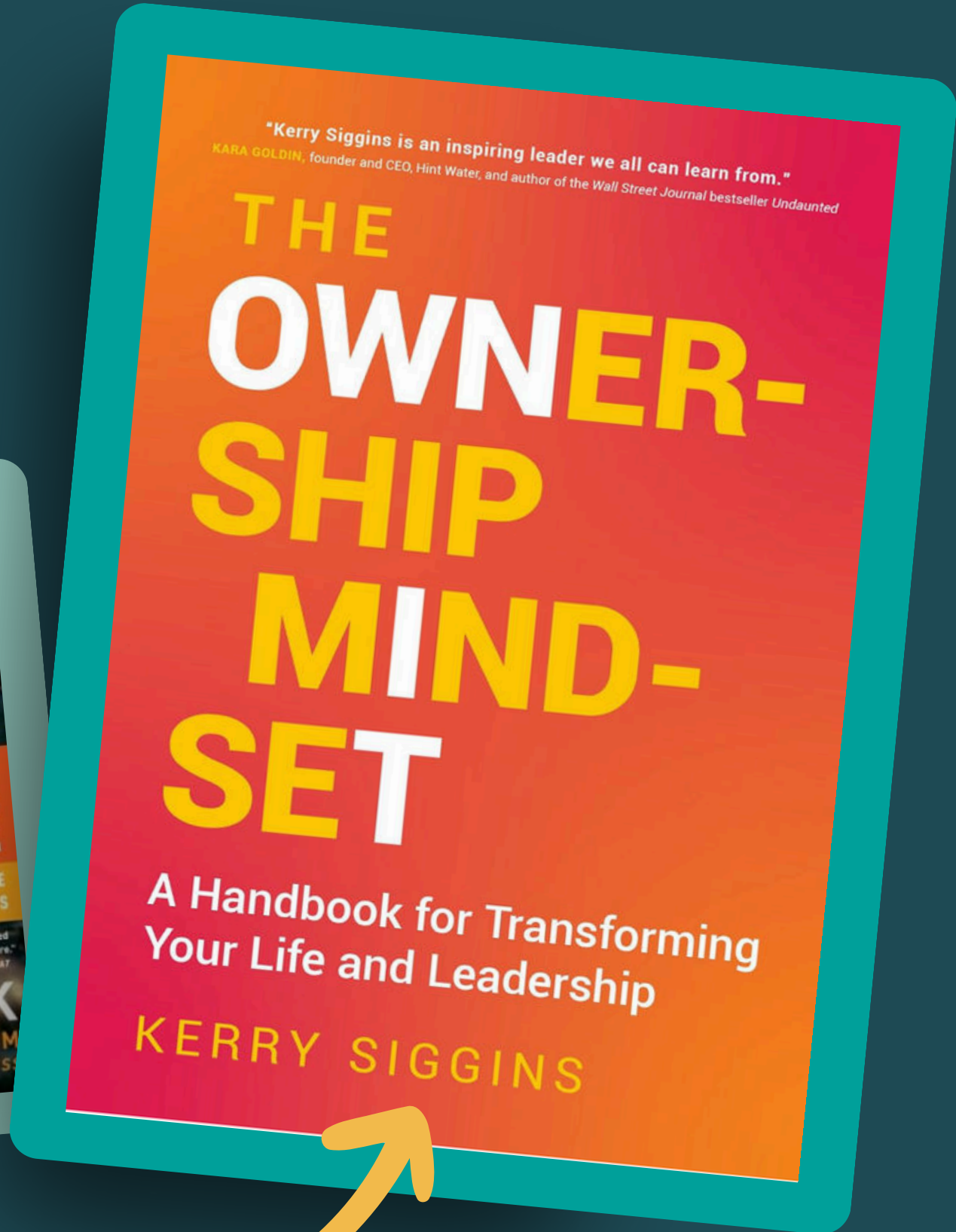
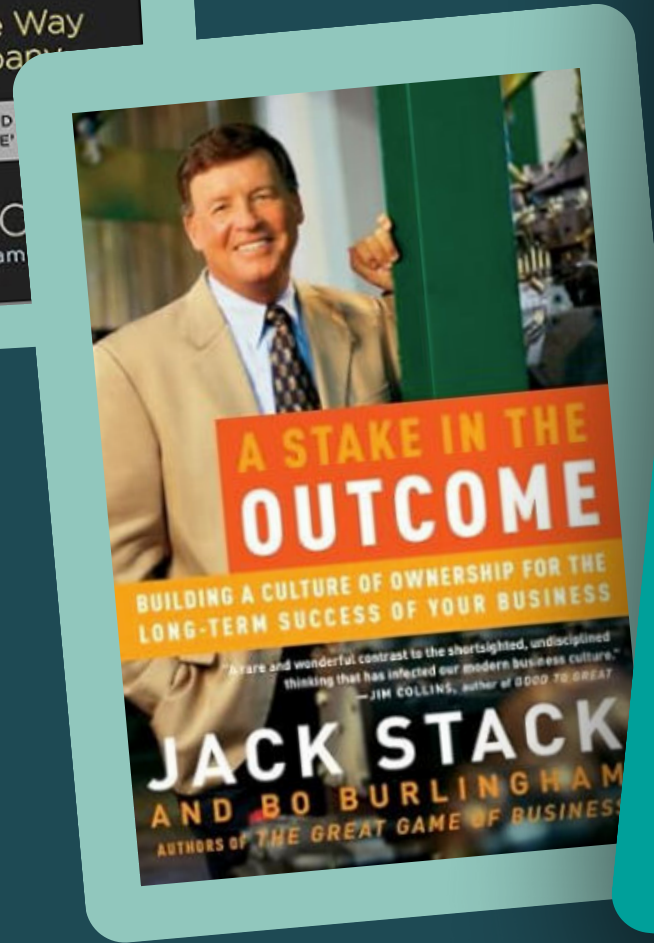
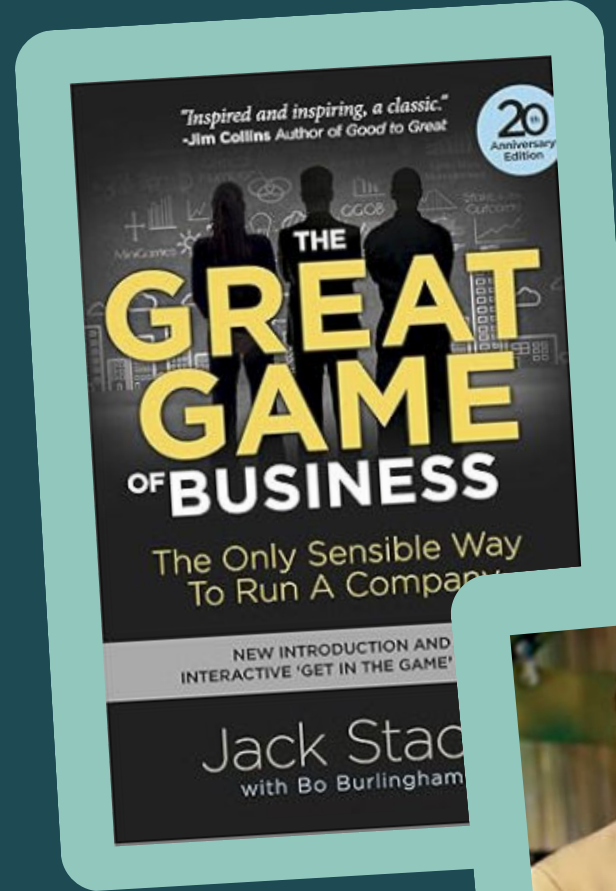
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Hometown
hero!



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**TRADITIONAL
WORK HIERARCHY**



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- Formal communication & education
- Plain ol' financial statements
- Long-term financial planning
- Market analysis
- Pricing strategies
- Industry comparables
- Wage & salary discussions
- Bonus & incentive plans

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**Top managers,
semi-formal approach:**

1. Learn personal & professional motivators
2. Introduce financials
3. Embrace collaboration & accountability



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**BOOST YOUR EMPLOYEE
OWNERSHIP CULTURE**

(Article link at end)





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EDUCATE

- Define goals
- “Guide Math”
- “Available for Employees” analysis

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OWNERSHIP PYRAMID



EDUCATE

- Define goals
- “Guide Math”
- “Available for Employees” analysis



“Calculate Your Way to a Potential Raise”

Slide deck at end



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COMMUNICATE

- In-person or virtual
- Mini Retreats
- Cost-Benefit Reasoning

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DELEGATE

- Key operating metrics
- Ownership in business outcomes





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TIMING:

- Start sharing info NOW
- Gradually share more as time goes on
- Encourage questions
- Share away!
- Give them the keys. Really.
- Let them prove they're worth it





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- Less formal
- Bite-size pieces
- Gamify the system
- Consistency is key



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EDUCATE:

- Training Skits
- Supervisors educate Employees

COMMUNICATE:

- Consistent sessions
- Share spending knowledge

DELEGATE:

- Give clear instructions
- Accountability opportunity

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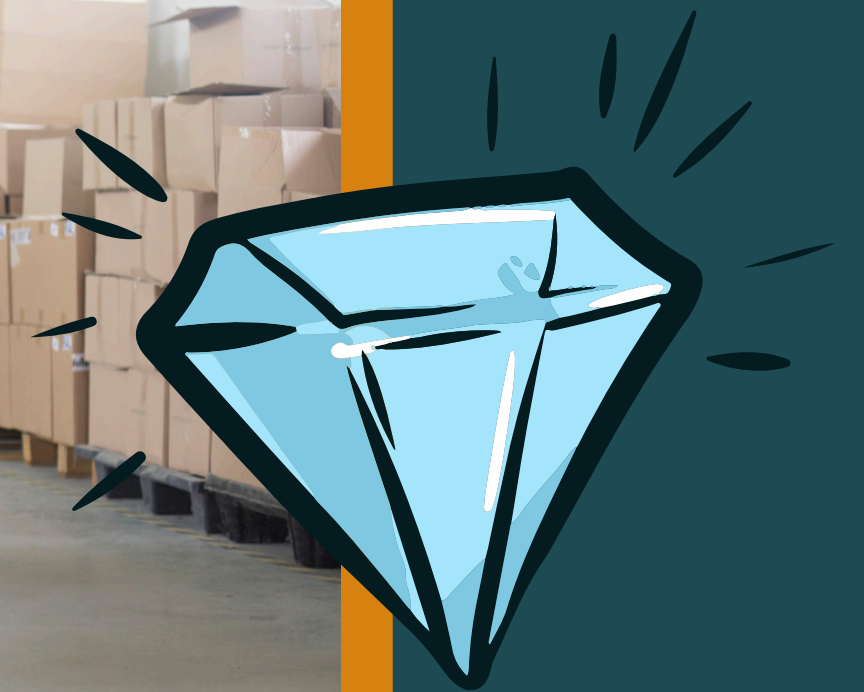
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**THE SKY'S
THE LIMIT!**

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FINANCIAL PLANNING

FORMAL EDUCATION

SEMI-FORMAL

BITE-SIZE PIECES



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ACTIVITY:

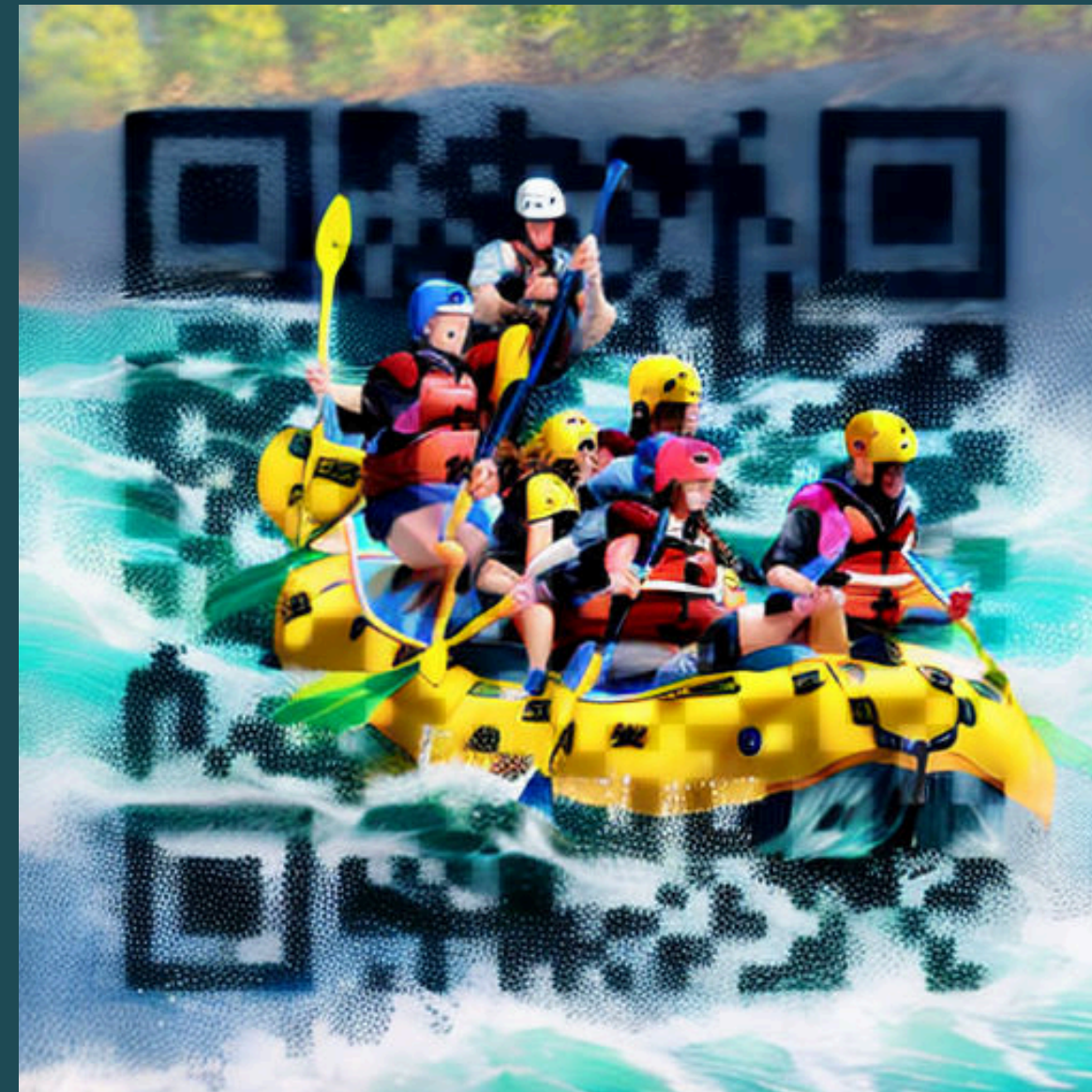


- 3-5 Minutes
- Open “Notes” app on your phone
- Write down **five things**

1. One culture aspect you’re proud of
2. One culture aspect you’d like to improve
3. One concrete action to improve it
4. Exactly which financial details you will share...
5. ... and with whom you’ll share them.



THANK YOU



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BUSINESS IGNITED
The Power of Everyday Innovation



COLORADO
Office of Economic Development
& International Trade
Minority Business Office