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## Industry roundtable: Family Business

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How were you exposed to the family business? Does growing your business challenge family relationships? Do you work with advisers to help you identify opportunities? Law firm Hodgson Russ and the *Albany Business Review* hosted a discussion to answer these questions and more. Cindy Applebaum, market president and publisher of the *Albany Business Review*, moderated the discussion.

**Can you talk a bit about what your company does and your family's history in business, and how you were exposed to the family business?**

**Andy Heck, president, Alpin Haus:** We sell RVs, boats, skis and swimming pools, and we have a health club. We have five locations, four throughout the Capital District and one store downstate.

My father started our business with one of his high school buddies when he was 23 years old. I grew up working in the business as a kid and going to work with dad, and then all through high school and college. I went out into the real world for a while before coming back into the business.

**Adine Viscusi, president, Casa Visco:** We manufacture pasta and pizza sauce primarily for regional supermarket sales. We also do a lot of private labels. Our business is kind of bifurcated between private label and branded.

When I grew up in the business, my earliest memory was not being tall enough to reach the labeling table, so they would stack cases for me and I would label stuff by hand. Summers involved all cousins in the manufacturing facility, mostly goofing off, not really doing a lot of work.

But I knew that I wanted to run the business before I could articulate it. It was a seed that was always there and I loved being there. I drive fast to get to work every day. I love what I do. I was exposed very early and kind of always knew that I wanted to be involved in the business.

**Richard Cunningham, president, Passono Paints:** I married into the business. I was an engineer out in Notre Dame. I'd gone to Wharton School and was working in New York City when I met Monique and we got married. And I could see that the company was there and it was something. They kept saying,



DONNA ABBOTT-VLAHOS

From left: Daria Mallin, Richard Cunningham, Adine Viscusi and Andy Heck.

do you want to come? I grew up in North Creek, and I'm always glad to move north. The rest is history. Fortunately, God gave me a strong back to go with my weak mind and I've worked there a long time.

**Daria Mallin, president/principal, ENVISION Architects:** My father started Envision Architects in 1983 with two partners from college and I grew up surrounded by architects, going to meetings. I grew up on construction sites, grew up learning to draw at his drafting table in our house.

I went to Cornell for human development to become a therapist for children. About halfway through my college career, I decided it wasn't for me. There were great design courses in my school at Cornell. I started taking them and realized I could help people through design and help communities through design. I got out of college, went to grad school for architecture, and two years ago the first principal retired from Envision, Michael Poost. My partner Kelly Klopfer and I bought his shares. Last year Dad retired and I acquired his shares. We took on a third female partner and they're like my family. I have a very small family and the firm is like my family. There isn't family in the business with me, but it's there because of my family, basically.

**Of the others here, how many family members are involved in your business and at what levels are they within the company?**

**Viscusi:** Zero. But that was a long time coming. It was started by my grandparents, and my dad and my uncle ran the business. I knew that I wanted to be at the helm, but I had two hardheaded Italian men that really didn't think that as a woman I would be able to do it. It was pretty clear that it was going to be a long road pushing this big rock up the hill, and I actually had to leave the company for them to see the value and passion that I added.

The only way they would agree to sell me the business is if I brought on my cousin because they believed I needed to have a male working with me. I finally got them to retire in 2008 and I promptly retired my cousin in 2010. There's no family in it now, other than people that are there, and they are truly family. My head production manager is from Mount Pleasant High School. We graduated together and he's been there since high school. And my brother-in-law, Bill, is the warehouse manager, but he doesn't have any ownership capacity or interest. It's just me now and I'm really happy about that.

**Cunningham:** Unfortunately, we don't have any family actually working now. My younger daughter worked with me for a long time, but then their family grew too big and her husband died and she ended up moving to New York. I have a son who is an orthopedic surgeon, so he doesn't need to make paint.

But I have a wonderful business partner who's so bright, and we learned so much with all of our complex formulas. We do everything together. We share everything and she's a great person to work with.

**Heck:** A bunch of us. My father is still involved. He is our CEO. Obviously I am involved. My brother is one of our presidents and he is in our boat side of the business. My younger sister is one of the vice presidents and she heads up our marketing. My oldest daughter went out into the real world, got some experience, and is back in the business running our fitness center. My son is out working in the real world, but at some point I think he'll come into the business. We'll see. And my youngest daughter, who is in college, works for us through college. She's working like the rest of the kids did.

**Have you ever had a policy about family members in the business?**

**Heck:** I think my father, without realizing it, kind of orchestrated the policy. My brother and sister and I all worked externally before coming back in the business. So, as he talked to me about my kids, I said it was great to go out and develop skills elsewhere and decide if I wanted to get in the business. I've told my kids they have to go out and work elsewhere and decide — for two factors. One is to develop their own skills. The second one is so they are accepted by employees and our team when they come back in.

### **What changes have you brought to the business?**

**Mallin:** We've had some significant changes in the past two years. I became president in 2016, almost exactly two years ago. And my partners and I are younger than those who retired. The gentlemen who ran the firm did so much on instinct and so much by the seat of their pants, and they did great. When we became leaders, we needed to figure out our own systems and how we were going to attract things, project things, operate, steer the ship, direct the ship, tweak it a little bit to keep going towards success.

Kelly is a principal who is not an architect in an architecture firm of 19 people. She is business development and marketing. That is a great change. She is out there talking about us and seeing what our community needs and how we can serve them every day.

Our third partner, Jen Robillard, came in with this real affinity for streamlining programs and streamlining how we work and how to get more profitable and what fee structures work for which clients. She's developed it into a very robust system. I'm managing the finances with projection sheets and ways of tracking things that the firm didn't have before.

Culturally, it's just a completely different leadership, completely different place. And that can be scary for people seeing that kind of change happening in two years. But the staff is amazing. They are on board, they are cheerleading.

We've grown our client base by almost 70 percent in one year. We've grown our staff to 19 now. This May was our best net billings in I don't know how long. We're pumped. We had a rough couple of years during the transition, but now we have our path.

**Viscusi:** Our industry has changed so much. The supermarket industry, there's been so much consolidation at every level. The distributors keep getting bigger and bigger, the retailers keep consolidating. That's been a huge challenge.

Back in the day, my dad would be able to pick up the phone and call somebody and say, hey, Grand Union or Price Chopper is out of stock and there are gaps in the store. There are no humans that you can call anymore. Everything is a portal and it's automated and people are buying my products for Price Chopper from Chicago. So, the buying office is in Chicago, where the product literally takes a road trip to go up to Lehigh Valley in Pennsylvania, and then turns around and comes back to Price Chopper. It is insanity.

**Cunningham:** It's a lifetime of changes. We've changed so much with the market and a lot of it we don't like. But you have to accept the market like it is. We're doing that. The market has really changed. We used to have seven retail stores. We have four now.

### **Is that because of the big box stores primarily?**

**Cunningham:** Yes. There were maybe 1,700 paint stores in America when I first started. Now, we're the only family company making paint all the way from the Midwest to the Atlantic Ocean. There's nobody. There's a couple small, small companies in New York City, but they make paint for apartments. They don't make all the things that we make. We match the giants.

**Andy, what type of changes have you brought to the business?**

**Heck:** It's been an evolution of stuff. Obviously we were much smaller. Now we have five locations. Back then, there was a lot of tribal knowledge. We've evolved through systems and processes and a lot of training.

As we are looking to maybe grow again to another level and add more stores in the future and do different things, we are putting playbooks together and training manuals. Companywide, we are studying other companies that have grown, and what they are doing to take that to the next level, so that we're consistent.

One of the things that was apparent to me as we've grown all these years is that we actually did it internally. When we opened our store downstate, 150 miles from here, they didn't know what Alpin Haus was. They didn't know what our culture was. They didn't know how we sold, how we served, how we did all these things. That was a lesson to all of us, things that we could do to do better for Alpin Haus. We have done a good job with that the last few years.

**Does growing a family business create challenges for maintaining family relationships?**

**Viscusi:** Compartmentalization is key for me. We have a little camp up in the Adirondacks and there's no telephone, no WiFi, no cell service, no TV. So when I go — and we are only in production four days a week — there is nothing going on when we are up at camp. It's a way for me to decompress and not think about it at all, and I really need that. When I am working and in real life, it is all you do. It is all you think about. It's constant. You can never turn it off. So I learned for me, the big part is to compartmentalize.

**Heck:** I guess mine is a little bit different. When I look at our greater extended family, because we are all involved in leadership roles, we get together every major holiday, birthday, whatever, we are together all the time. My parents live on the Sacandaga. We are up there all summer together, and it's inevitable we are talking family stuff, having fun, we're talking business and, you know, they could go back and forth all day long in a positive way, because we are excited about it.

Also, the products that we are in are recreation based. So, if we are on the lake in the summer and a boat goes by; we're asking, hey, did we sell that boat? What is that? We are always thinking along those lines.

Part of the reason why I wanted to get into the business was my father loved our business. I saw that every day at home, and I just wanted to go to work with my dad. I try to have the same thing in our household. Luckily, my wife is the same way. She loves our business. Growing up, the kids always wanted to know, hey, dad, what is going on?

We don't turn it off ever. Sometimes that could be kind of scary to some people, but we kind of know how to maneuver in and around it, and it's fun.

**Mallin:** When we were in business together, my dad and I talked about business. That was our relationship. Now we talk about other things. I love hearing about his life and all the things that he is

doing. He loves hearing about mine. We can get together with all of our significant others and just talk.

**Can you think of a lesson learned while you and your dad were moving through the business relationship?**

**Mallin:** Bring it home less. Leave work at work, even if it's something we are excited about. I think it does have the ability to alienate other people that you are trying to engage with.

**Can you talk about your company's culture and how you came to build that culture?**

**Cunningham:** Our culture is taking care of our customers, but we also focus on where we're going, what's new, what is our new big project. We're working on that new project all the time.

**Mallin:** Something interesting that we did this year was reevaluate our vision and mission values of the firm, and the staff got really excited about. We got to hear about what they value and who they want to be as individuals, as designers and as a staff and as a company, and we really listened. We did a lot of listening, and where we landed is that our mission is "leading design and advancing communities." What came out of all of these discussions is, design is so important to us, community is so important to us, and the ability to advance both of those is what we want to do. The staff is really focused on those things. So it's a culture of design. It is a culture of helping, of volunteering, of going out in the community and doing things, of making relationships and it's just this wonderful synergy of interests right now.

**Heck:** Over the years, one of the things I drew on as the kids have grown, is we wanted to keep that tight family-feel culture. I have obsessed over it. How do we treat our employees? How do we keep that tight-knit feel as we grow? And we do so much. We try to be very flexible with our employees. We try to have fun. One of our core values is fun. We do a lot of spontaneous events through the year to bring employees together. Every month or two there is something going on inside of work to bring people together, and I think it's just every day valuing their opinion, getting their opinion.

I personally send out an email every week to every employee in the company about what happened that week, what is coming up next week. We have an online tool where every week we have a question, a couple questions of the week, where one is a survey question and one is a hypothetical question about something, so that I get input from any employee that wants to input every week. At the end of the day, we are very customer-service oriented and we need long-term employees, happy employees.

**How many hours a week do you work?**

**Cunningham:** I was five and a half days, but a little less now. Always five full days, but I always, if I am in town, I go to the factory on Saturday. I used to stay half a day, now I might stay two hours, or one hour.

**Viscusi:** It varies so much because our typical workweek is four days a week, but I am there every Friday and most Saturdays. I try not to be there for a long period of time. We're also seasonal. We are super busy in the fourth and first quarter. But spring and summer, nobody is really doing pasta and pizza, so it's a little bit easier time. I try to take that breath, breathing time and space to kind of pull away.

**Heck:** I have no idea. For me, my business is also my hobby, so it's not like work to me. I look at it like a work life, not a balance of work-life integration. It's seven days a week, and I know my calendar ahead of time. I am obsessed with everything I try to do.

**Mallin:** If you went on a timesheet basis, you'd probably see I work 40 to 45 hours a week in the business. But I think I also work many hours a week doing a lot of reading, a lot of research, talking with my mentors, meeting with them, networking, benchmarking, thinking up systems, thinking of design, going out and seeing buildings. It's definitely a huge part of my life and I have a very, very wonderful husband who gets it and supports it and just sees where we are going and is very excited about it.

**Do you go on regular vacations?**

**Cunningham:** If you asked my wife, she'd say no.

**Viscusi:** Not really.

**Heck:** Now that the kids are 20 and older, my wife and I plan out our vacations. We know where we are going this year, next year, the year after that. I am a work-hard, play-hard person.

**How is the Capital Region for operating a family business?**

**Viscusi:** Fantastic. Andy and I are actually part of an informal group of family businesses that Jason Packer from Hill & Markes started. First, we complain about our employees and then we get talking.

There's a very vibrant community in the Capital District that supports each other. For example, if you had to call up a half a dozen people in your industry, you could probably get them together at a moment's notice to solve a problem, to help you out, if you needed resources. The food community in Schenectady alone, we could have a parade in five minutes notice. We're a strong, really closely knit group and we rely on each other a lot for a lot of things.

**Heck:** The environment is awesome, the customer recognition is awesome. The Capital Region is big but small. It is always easy to make connections. Everybody knows everybody. Those are all just huge benefits. Everybody is supportive and willing to help and everybody wants to see everybody succeed. It's just unbelievable. It's so easy. It's so much fun.

**Cunningham:** One of the ways we survive, is that we belong to a buying group in which we are a shareholder and buy all of our chemicals, all our colored presentations. Albany is some marketplace. There is Chicago or Memphis or some of the bigger cities, but all of a sudden Albany is perking up.

**Mallin:** The connections are immeasurable. That could work for you and it could work against you, depending on who you talk to. But it's been tremendous. The ability to pick up the phone and call either a first generation that my dad worked with for an issue or a second generation who's now my peer, and know that we are a family and they are happy to help and want to see us succeed. It's good.

**Do you have a succession plan?**

**Cunningham:** No. We know where we are going.

**Mallin:** I am 38. I think I have a few years to figure it out. There will be one, though.

**Viscusi:** No, I don't.

**Heck:** Our plan is I hope to work for a very long time, but in the event something were to happen to me, we have a backup plan. The big part of the plan was getting the transition from my father down to our generation. I am already starting to work with attorneys and different things for what would happen to my shares with my kids and things like that. We have got that all buttoned up and set.

## **Do you work with advisory boards or consultants to help you identify opportunities and decisions?**

**Mallin:** I am a member of Women Presidents' Organization, chapter one Albany. It's like having friends who are a board of advisors. I work with Bonnie Boyce as a mentor, and I work with Ralph Steinglass from Teambuilders in Manhattan. He really helped us through our transition planning.

**Cunningham:** Because everything is so technical, it's hard to. But we certainly work with our attorney and our accountant, and networking within the community of your peers is just great.

**Viscusi:** Trade shows are a great place to find common ground. I also have a very tight relationship with my accountant. He's seen the whole arch of the business from us transitioning my dad and uncle out, to where I am trying to take it. We have meetings at least once a year where we sit down and plan things out and talk about strategy and long-term goals. I have a three- to five-year plan and a five- to 10-year plan in place. I am never going to be the smartest person in the room, but I know how to get really smart people behind me and helping me. Meeting with other people in the community is also huge for me.

**Heck:** We use a lot of consultants in our field. We belong to an RV peer group that is nationwide through Canada that we meet with four times a year to share best practices and get together for two days, financial data, everything. We have a sales trainer that's specific to the RV and boat industry that comes in several times a year, and that we work with monthly. We have a company that we hired a couple years, The DiJulius Group, to work on customer service, which we're working on all the time.

## **What keeps you up at night?**

**Viscusi:** Retaining employees. That's really tough. I don't know whether it's a generational thing, an age thing, an experience thing, but people don't want to work. We have some fantastic employees now, but I would say getting those employees and retaining them and getting everybody motivated is probably a big challenge. With all the consolidation that we see in our industry, it is harder and harder for small manufacturers to play in that big arena.

**Heck:** The challenge is hiring and training employees of the caliber we want. We've had explosive growth the last five to eight years and trying to onboard and get the right people, the right fit at the same pace that we are growing, so that we could take care of our customers, always worries me.

**Mallin:** I sleep very well. I am really focusing on being more mindful and more present at work with my staff, with my clients, with my family, with myself and with my friends. Really, it's a way of compartmentalizing. I am finding that each of those things is better when I'm present, and that makes everything else better. So that is something I work on. It doesn't keep me up at night. It actually helps me sleep better.