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A Strong Legacy

Five years later, Richard Strong's protégés continue to thrive



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Fiserv Inc.

255 Fiserv Drive, Brookfield
www.fiserv.com

Industry: Financial services

Innovation: Fiserv Boardroom Series, Person-to-Person payments and improvements to online bill pay.

Brookfield-based Fiserv Inc. developed three key innovations for customers in 2009, including the Fiserv Boardroom Series, Person-to-Person payments and improvements to online bill pay.

The Person-to-Person payment enables customers to quickly and easily send or receive money person-to-person using their existing online banking relationship.

The Fiserv Boardroom Series was the biggest game-changer, allowing Fiserv to interact and engage customers through an online leadership community.

Through the Fiserv Boardroom Series, subject matter experts from Fiserv share business insights, market trends and research data providing financial institution leaders with the latest information to help them plan for their future.

"We wanted a leadership community to look for ways to manage business, especially in a different economy," said Mark Sievwright, vice president of strategic marketing for Fiserv.

Launched last July, the system allows 24/7 access for Fiserv to communicate with their clients through video, white papers and other multimedia.

"The leverage of so many subject matter



Jeff Yabuki

experts under one roof is latent ability," Sievwright said.

Siewwright credits the innovation to chief executive officer Jeff Yabuki's forward thinking. "The fundamental to innovating is a value to Jeff, and it is to 'create with purpose,'" Sievwright said.

Fiserv has 20,000 employees and posted \$4.08 billion sales for 2009.

According to Sievwright the Fiserv Boardroom Series innovation did not have a direct impact on the company's bottom line, but was an important enhancement for its customers.

"The price side of it was never considered as it is a value added to what clients needed," he said. "For us there was never a notion to charge for this service."

The company plans to add a mobile device application for the Boardroom Series in the first quarter of 2011 and is exploring multi-lingual content down the road.

"We thought we would get 500 clients by the end of 2009," Sievwright said. "We actually had 2,500 users by the end of 209 and today we have over 4,000 so we are well on our way."



GetMOR Enterprises LLC

8825 S. Howell Ave. Suite 305,
Oak Creek

www.thegetmorplan.com

Industry: Health Care Product/ Services (non-insurance)

Innovation: A hybrid tax-advantaged health care funding mechanism.

Nancy Melcher, who founded FlexMOR Corp. in 1998, came together with Matt Skiles, who headed Benefits Management Consulting LLC (BMC), to co-develop GetMOR, a hybrid tax-advantaged health care funding mechanism.

The two consolidated their companies in July 2009 to form Oak Creek-based GetMOR Enterprises LLC.

"We had two services and the product brought us together," said Melcher. "We became one entity for the groundswell of activity to bring to distribute the product."

GetMOR provides the savings and portability features of a health savings account (HSA), while allowing the flexibility in insurance design of a health reimbursement account (HRA). Tax-free money is placed by the employer on a MasterCard debit card for employees, and unlike flexible spending accounts, it allows spending dollars to roll into future years.

"Founded as an HRA model, it has to have design flexibility because HSA limits item integration of HSA with trust and investment of vehicle," said Skiles.



Nancy Melcher Matt Skiles

According to Melcher, who referred to GetMOR as a H3RA, the plan; rewards and puts resources in place for employees healthy behavior; reimburses health expenses and allows employees to reserve funds for medical expenses as they would in a similar HSA fashion without all of the restrictions.

"It engages the employee in a partnering behavior to get health care," said Melcher.

With buy-in requirements for HSAs, Melcher and Skiles provided a solution to HSA cost pitfalls.

"That is why we co-developed this," Melcher said. "We saw a need and met the needs of unions, employees and companies not able to control cost. This gives a fixed expenditure."

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Keynote speaker Mark Herndon will lead off the morning program. Mark serves as president of Dallas-based Parkwood Advisors LLC, a diversified professional services firm focused on M&A, investment banking and private equity financing.



HERNDON
Keynote Presenter

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Congratulations from the strategic partners behind GetMOR Enterprises.



Congratulations to Nancy Melcher and to the entire GetMOR Enterprises Team from Spectrum Investment Advisors.
7100 W. Donges Bay Road • Mequon, WI 53092
800-242-4735
www.spectruminvestor.com