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Reflections on the NextGen Program from Its Newest Members

Carol Wittmeyer

St. John Fisher University, cwittmeyer@sjf.edu

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Abstract

This article will focus on sharing NextGen stories from two new members – who have many similarities and differences – to learn about their takeaways from the program and how it is helping them to prepare for their future:

Joseph Unger III, Store Manager of Unger’s Shoe Store Inc., in Ironton, Ohio. Joseph is third generation, age 30. The firm was started by his grandfather 84 years ago.

Gavin Martin, ELM Shoes, Inc., located in Greencastle, Pa. While Gavin is the youngest NextGen member at age 22, his firm is one of the oldest at 91 years, and he is a fifth-generation family employee.

While both NextGens are from businesses that span at least eight decades, the NextGens have very different stories. Joseph did not go right into the family business from high school; Gavin did.

Disciplines

Business

Comments

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CAROL WITTMAYER, ED.D.

This article will focus on sharing NextGen stories from two new members – who have many similarities and differences – to learn about their takeaways from the program and how it is helping them to prepare for their future:

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Joseph Unger

Joseph did not start out his career in the family business, Unger's Shoe Store, started by his grandfather, Joseph "Gene" Unger, in 1937. His father, Joseph II, "Joe", went into the business very

young in 1982. According to the store's website, "From a young age, Joe knew exactly what he wanted to do when he grew up. He followed in his father's footsteps learning the footwear trade at age 14. He worked in the family business after school and on the weekends throughout high school with his father, Joseph "Gene" Unger, until Gene's death in 1995." At that time Joe became the sole owner.

Joseph has two sisters, Rian who is older and Laiken who is younger, and a younger brother, Izsak. They all spent



Dr. Carol Wittmeyer

time at the store growing. All four siblings started out in the business when they were in junior high, helping with



Joe, left, and Joseph Unger setting up Unger's Shoe Store booth at a 5K race.

Joseph Unger

In sum, Joseph Unger said that “the NextGen program accelerated our planning processes. It sparked conversations we needed to have. As soon as we came back, we made great progress. If we can make progress week by week, we’ll be in good shape. It’s been over a month. It’s been phenomenal.”

stock in the back room. Their aunts also put their fair share of time in at the store. During high school, the siblings spent more time there on the weekends and summers, assuming more roles along the way. After high school, Joseph decided to attend college in Marietta, Ohio, and from there he landed a job with Chevron working in Texas. At the time, he was not interested in working for the family business, although Joseph told his father that in five to ten years, he would revisit the family business decision.

In 2019, after several years in the oil industry, Joseph decided to return to the family business. This turned out to be an easy decision for him. He had a passion for the business. He married his high school sweetheart, Sunni, who is from the area. She understands family businesses as her dad owned one as well. She attended the last NSRA NextGen Conference with Joseph and enjoyed it, given her background and interest in the future of Unger’s Shoe Store. That said, she has her own career as a physical therapist. The couple has two children, Bonnie and Bettie.

Joseph reflected on the first NextGen program that he and Sunni attended in November 2021. One of the things that was on his mind was to begin the planning process for his biggest known transition on the horizon – succession planning issues related to the business, ownership and the family. Specifically, he is studying up on buy-sell agreements and life insurance strategies and



Joseph, Bonnie, Sunni, and Joe Unger. Joe had just finished fitting Bonnie, his first grandchild, in a pair of Stride Rite early walking shoes.

is also considering how to treat the business and real estate in succession longer than the other. Like his peers, he wants to figure out how to do all of that

He thinks about his parents’ retirement needs and the likely situation that one of them will need support longer than the other. Like his peers, he wants to figure out how to do all of that effectively and efficiently while keeping peace in the family. Before Joseph arrived at the family business, there was very little in the way of succession planning, although Joe fully understood it needed to happen.

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At the NextGen meeting, Joseph soaked up succession planning lessons, and so did Sunni. They were also impressed with meeting peers who had similar issues. The peer group helped them realize they are not the only ones with transition planning challenges. Some peers have done it. Some are in the process. The dialogue and sharing from peers with different experiences and who are at different places in the process, gave them ideas and shed light on possibilities.

Gavin Martin

Unlike any other NSRA member, “ELM Shoes initially began as a result of one man’s innovative attempt to survive a crisis. After losing a contract to bus school children in 1930, J. Ira Eshleman and his sons-in-law, David Lehman and Norman Martin, turned the buses into “stores on wheels,” according to the store’s website.

In February of 1941, they acquired the building known at that time as the iconic D. F. Ryder building in Greencastle, PA, and opened a retail establishment. The business included groceries, hardware, dry goods, clothing and a tailor. In 1957 the dream of having a separate “shoe department” was formed by Norman’s oldest son, Lester Martin.

Gavin is proud of his family’s business history and enthusiastically shared an important lesson learned, “by splitting the clothing and the shoes, peace was kept in the family”.

Gavin’s grandpa, Lester, stayed in the business until he was 72, and retired in 2007. Then, Gavin’s dad, Loren, and uncle ran it. In 2013, Loren bought out his brother and now is the sole owner. Gavin noted that transition was important to the ultimate success of the business and to everyone’s happiness. At that time, Gavin started increasing his work to a few days a week. He grew up in the business, working in the back room. At the age of ten he was earning money from working in the stockroom. Gavin had a unique situation; he was home schooled, so he had more flexibility to work. By the time he was 16, he was working three to four days a week, getting his schoolwork done between customers.

By the time Gavin got to his senior year, he had completed most of his degree requirements and had a light academic load. A good employee quit and that triggered his father asking him, “do you want to work full-time?” He did. He was 17 and has never left.

Gavin said, “for the longest time, I didn’t know if working in the family business was something I wanted to do. The full-time work helped me learn and I was having fun – enjoying the

customers, back room work and seeing the possibilities of owning a business. It was intriguing to me. In the long run it’s more work than working for another business. There is so much opportunity to do what you want”.

After the NSRA NextGen meeting this past November, Gavin said that he enjoyed seeing what his peers have done and what he can learn from them. He experienced his Dad’s buyout process of his uncle, and said that he learned firsthand how important it is to make sure owners are on the same page and how complex things can come when there is a business, real estate and family harmony to negotiate. As he got to know his NextGen peers, he realized that he is in a different situation, in that his Dad is in his 50s, and some of his peers have parents who are much older and their succession goals and inevitable horizons are closer and more urgent. His biggest takeaway was hearing everyone’s transition stories and noting the variety of tension points around them. The program has been helpful for him to hear those and realize that he has time to plan with his father. The program has helped him consider how to start a conversation with a par-



**Gavin Martin of ELM Shoes
in Greencastle, Pa.**



ELM Shoes started out in 1930 as Lehman & Martin Store on Wheels.

ent about how to work together on a plan to make the smoothest transition possible. It should not be contentious and should be flushed out when the time comes.

Gavin enjoyed meeting several peers who have been in the same position as him – going right into the store from school. He is learning from them how they overcame obstacles from being

Building Relationships Within the Program

In terms of NextGen program content, both Joseph and Gavin enjoyed learning about generational differences and transitions, and how to get started and succeed with difficult conversations related to transitions. They realized every family struggles with bringing up topics that can cause emotions and issues, so

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the owner’s children/salespeople to the manager of non-family employees who knew them when they were young. He was able to bounce off ideas on peers and hear their stories, and noted they are very open to share. In turn, Gavin gives his peers perspective on what someone ten years younger thinks about. The program has created a “huge wealth” of resources for him.

learning more about them and how others handle them is extremely valuable. Hearing stories of how other peers, many of whom are siblings, have approached difficult conversations with parents and others helps participants think about the best strategies for successfully navigating their sensitive topics.

Joseph and Gavin gave high prais-

es for the instructors, who provided good examples on how to approach things and when/how to involve third parties who can assist families in moving forward with difficult processes. Participants understand that getting help can be a good strategy to find the best answers to problems.

The program schedule enhances group interaction with an evening kick-off reception prior to the day-long sessions. The instructors encourage open and participative discussions. Anyone can “chime in” and feel heard. For a bigger NextGen return on investment, the group stays together between sessions.

The NextGen group has formed a Facebook group. They ask questions to each other, respond, and post other information. Everyone has been responsive and sharing. For example, during the pandemic’s early months, quite a few members were asking others how they were handling things.

Another NSRA Asset – the *Shoe Retailing Today Magazine*

Joseph shared that he loves the magazine. He regularly reviews it to learn more about what other retailers are doing, especially related to social media, websites, inventory management, customer experience, and leading employees. Some articles challenge him to take the next steps forward into technology in particular, so much so, that he has suggested an article topic.

The NSRA NextGen Program has provided dozens of shoe retailing family-run firms with strategies and networks to assure their business continuity and to navigate business, ownership and family transitions. For more information on NSRA’s NextGen Program, visit www.nsra.org/page/nextgen, or call 520-209-1710. ■

Dr. Carol Wittmeyer is interim dean of the School of Business at St. John Fisher College. She teaches at the Family Business Center at Loyola University of Chicago and is also a founding faculty member of NSRA’s NextGen initiative.