

## OPEN LINE PRESENTATION

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Guest,

**Welcome to:**

### **Managing Your Hat Collection! The Key to becoming a Successful Multi-Generational Family Business**

Presented by  
Lighthouse Consulting Services, LLC



**Featured Guest:**

*Ken Ude, Director  
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**Host:**

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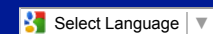
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### Discussion Outline

- Why Family Businesses are so important
- Mission of the USC Marshall Family Business Program
- The Key is Managing Your Hat Collection
- Understand the Six Critical Transition
  - Focus today on the Founder's and the Families' transitions
- Family Business Check-Up tool

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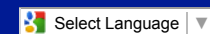
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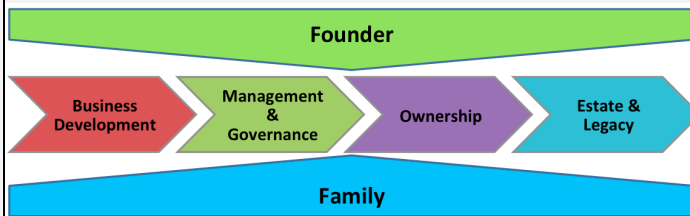


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### Framework for the Discussion

Six Major Transitions that a Successful Multi-Generational Family Business must Navigate



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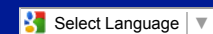
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### Family Business Dynamics

#### What Families Want

Business prosperity  
Family harmony  
Personal well-being

#### What Families Often Get

Under-performing businesses  
Family dysfunction  
Personal vendettas

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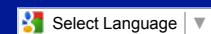
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### Two Principal Reasons

- Conflicting Values
  - Family vs Business
- Different definitions of 'Personal Well-Being'
  - Driven, to a great extent, by personality differences

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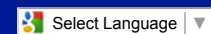
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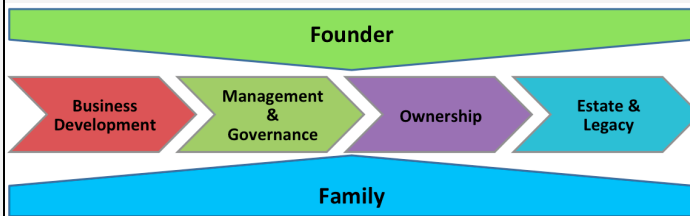


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### Six Critical Transitions

Six Major Transitions that a Successful Multi-Generational Family Business must Navigate



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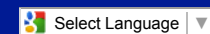
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### The Founder's Role Must Evolve

- 4 Different Stages in the Growth of a Business
- Start Up
  - The Founder is the 'Doer' and 'Initiator'
- Growth
  - Founder transitions to a 'Builder' and 'Student'
- Creating Wealth
  - Founder becomes the 'Manager' and 'Teacher'
- Managing Wealth
  - Founder as 'Mentor' and 'Door Opener'

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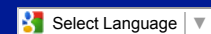
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### Keys to the Founder's Transition

- Realization that there is Life After Business
  - Preparing to transition to the next leader
  - Preparing to retire
- Effective Transfer of Power
  - What role will the Founder play?
- Financial Independence
  - Making sure that the Founder has enough \$\$\$

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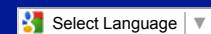
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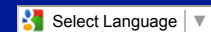
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### The Founder's Financial Independence

- Avoid the 'one stock portfolio' trap
  - Move wealth out of the business into other investment vehicles
- If the Founder's retirement income security depends on the business...
  - They may never let go!

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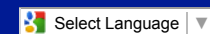
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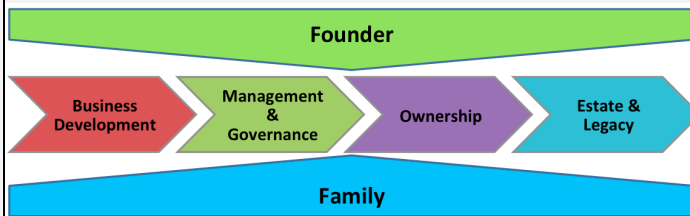


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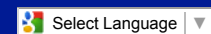
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### Family's Role

- Goal:
  - To make your family's movements in search of balance purposeful rather than random!
- Value the Differences in Your Family
- Beware of Family Myths
  - Avoid letting them 'splash' into the business
  - Especially as the in-laws show up

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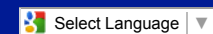
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### What Changes Family Dynamics

- Age
- Evolution of the Business
  - and its success ... or challenges
- In-laws
- Kids and Grandkid
- Substance Abuse
- Death & Divorce
- \$\$\$\$

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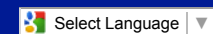
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### Keys to the Family's Transition

- Managing your Hat Collection
- Effective Communication
- Governance
- Competency

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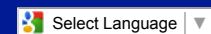
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### Managing Your Hat Collection

- There are ~ 12 'hats' in every family business
  - CEO, Parent, Child, Advisor, Owner, Employee, Relative ....
- Each 'hat' has a:
  - Role
  - Responsibility
  - Accountability
- If a situation comes up and you have a 'hat' you must put it on and act appropriately

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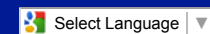
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### Keys to the Family's Transition

- Build a Collaborative model
  - When the business, and the kids, are young communication can be more authoritative
- Be aware of roadblocks to successful communication
  - Filters, Headset and Emotions
- Hearing and Agreeing are not the same
- Practice and build your skills!

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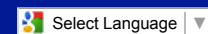
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### What Changes Family Dynamics

- Who will make which decisions?
- How will decisions be made?
- How will decisions be communicated?
- What are the requirements of the decision makers?
- Who are the decision makers accountable to?

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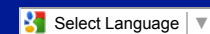
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### Competency

- Clearly defined responsibilities
- Develop a coaching and mentoring system
  - Develop tomorrow's leaders today
- Create specialized education and training
  - Especially as it relates to entering the family business or teaching non-executives about the business
- What are the rules before entering the business?

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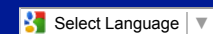
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### Key Tools for the Family

- Strategic Family Plan
  - Like a business plan, but for the family
- Family Constitution
  - To define the guiding principles under which the family will operate and to set goals
- Family Policy Manual
  - To define the rules for those planning on entering the family business
- Family Communications Plan
  - Through family meetings

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### Key Tools

## The Foundation for the Family

- Vision:
  - The family's collective view of 'success' through the generations
- Values:
  - The qualitative, ethical and moral guidelines of the family
- Mission:
  - What the extended family group intends to do in order to realize their vision

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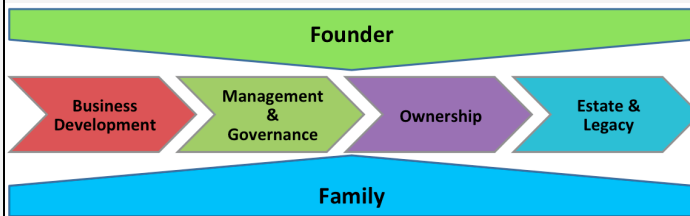
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### Six Critical Transitions

Six Major Transitions that a Successful Multi-Generational Family Business must Navigate



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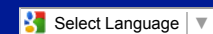
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### Management Transition

- Consider Your Options
  - The 'ideal' candidate may, or may not, be in the Family
- The New Management Model
  - The management model will change ... and it will be planned or not.
  - Decision making will be different
- Leadership and Team Building
  - The leadership model will change

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### Role Of Advisors

- For the Business and for the Family
- For Advisors to be valuable
  - Make them a member of the 'Brain Trust'
  - Make sure they possess the Technical Expertise
  - Are outsiders, and not a member of the club
  - Are great communicators ...no Techno Babble
  - Know how to Facilitate
  - Can be a great mentor

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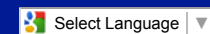
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### Family Business Check-Up

- Assessment tool that explores how the family feels it is navigating the 6 Transitions
  - Founder, Family, Business, Management & Governance, Ownership and Legacy
- Provides feedback on each transition
- Is a tool to start the conversation and to develop a Plan
- Involve many and take it often

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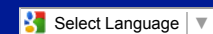
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### Summary

## 12 Rules for Success

1. Create a Vision .... Share the vision
2. Change .... Willingly
3. Know when and how to let go
4. Promote good family relationships
5. Keep your values in balance
6. Build the family business team

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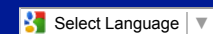
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### Summary

## 12 Rules for Success

7. Take care of your Culture!
8. Optimize your resources
9. Build long-term sustainable value in your business
10. Provide for tomorrow's leadership, today!
11. Plan to transfer ownership
12. Keep some financial eggs in other baskets

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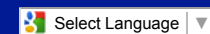
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