

Do-It-Yourself Family Meetings

By: John L. Ward, The Family Business Consulting Group

Family business experts consistently tell business owners, You should hold family meetings. We think that's great advice. But those experts also seem to suggest: Don't try it on your own. That's where we disagree. We believe that families can have successful meetings on their own, especially if a family member has been trained to facilitate family meetings. The cost and sometimes unpredictable quality of outside facilitators may discourage business-owning families from having family meetings. They may find the do-it-yourself approach to be more comfortable.

Family meetings can improve the chances that the business can continue in the next generation. We are talking about regular family gatherings of multiple generations, children and spouses, who come to learn, discuss, dream and plan as a family one to four times each year. While the family's business is often an important topic at these meetings, any family-related subject is appropriate. Thus, the entire family, regardless of ownership or employment in the business, is urged to participate.

Agenda topics can include family mission statements, philanthropic or community activities, next generation leadership, individual recognition, family policies, education, estate planning, family history, family fun and many other matters. Family involvement and participation contribute to the real goal of family meetings greater cohesion, communication and planning. A two-day family meeting we attended included discussion not only of the family's business and the business leader's succession plan but also dealt

with improvements to the family's vacation retreat, a presentation on estate planning, selection of those responsible for planning and implementing the next meeting and a bass fishing contest!

Facilitating one's own family meeting can seem daunting because of the potential emotional intensity of family discussions. To be effective, a family-member facilitator must overcome emotional barriers, dispel long-time family stereotypes and contain long-standing conflicts among family members. All are tough to do. Sometimes it is hard to forget that your little brother Tommy broke your favorite toy truck when you were five years old, said a second generation executive of a \$20 million dollar textile company. We can count on Ben and Tommy disagreeing about something at every meeting, added another family member. That used to upset Mom, but we've learned to deal with that dynamic more constructively now.

We have heard several objections to using family members as meeting facilitators: inadequate training, lack of inherent qualities necessary to facilitate complex family meetings, and the difficulty of remaining objective. Sometimes family members perceive these meetings as a waste of time altogether or as a project initiated by family members with heavy personal agendas attached. Most of all, families want impartial facilitators.

We have found that a family is more likely to trust one of its own when it has a voice in choosing its facilitator and when safeguards prevent favoring personal agendas.

We urge you to try a family meeting and offer some tips to increase your probability of success.

Recommendations for

Facilitating Your Family Meetings

1. **Co-facilitate.** Elect at least two family members to facilitate the meeting. Co-facilitators provide checks and balances. If one wants to express strong opinions about a topic under discussion, the other facilitator leads that portion of the meeting.
 2. **Involve Others.** Having multiple family members involved in planning and running the meeting prevents the impression that any one person dominates the show and gives family members not employed in the business a chance for leadership. Delegating responsibilities keeping notes, tracking time, handling flip charts, typing minutes, chairing committees and preparing handouts will likely gain greater participation and support for the process. It also frees the facilitator to concentrate on the crucial job of maintaining focus and momentum.
 3. **Get Training.** Great facilitators are goal-oriented, charismatic, flexible, professional, diplomatic, sensitive, intuitive and patient. Many families have members who have demonstrated such skills in civic, church, school or other groups. While some family members personalities better qualify them as family meeting facilitators, they should enhance those skills through training in communication, conflict resolution, active listening, decision making and group management. Experience in facilitating other groups can be helpful.
 4. **Know Yourself.** Reflect on how you work and communicate. Recognize your strengths and weaknesses. Understanding your personality style and how it affects your responses will give you greater appreciation for family members different styles.
 5. **Know Your Limits.** Family member facilitators should understand where their competencies end and when professional intervention is necessary. Intensive conflict, sociopathic behaviors, communication breakdowns that threaten the ability to continue the meeting or domination by one person or a small group are symptoms that professional help may be needed.
 6. **Minimize Surprise.** Family members want to feel safe as they approach the family meeting. Memos, reading material, updates and meeting agendas sent out well in advance of the meeting are crucial to helping everyone feel more prepared. We also recommend that facilitators invite suggestions, contributions and feedback before finalizing the agenda.
 7. **Set the Rules First.** A priority item on the first meeting's agenda should be the establishment of ground rules that will provide the safety and reinforcement necessary for family members to interact. Examples of ground rules we've seen: Each person speaks for him or herself, no cell phones and pagers, one meeting (no side conversations), be mentally and emotionally present, late-comers pay admission (25 cents for each minute late), feedback must be solicited first, and so on.
 8. **Have Fun.** Family meetings work best when they incorporate opportunities for family fun. Fond memories and jokes evolve alongside serious discussions and help lighten the mood during the meeting. Several families build in presentations by the younger-generation members. Some create a commercial for the business or make T-shirts with original slogans. Skits or talent shows are popular. Group exercises, projects and activities can be highlights of the meeting.
 9. **Pay Attention to Details.** Logistical elements can make or break a meeting. People are naturally more willing to sit in a room and talk to one another if the chairs are comfortable, the coffee's hot and the breaks are ample. Are phone banks and restrooms nearby? Who's watching the children during the meeting? Will snacks be available between meals? Some families assign a meeting hospitality committee to ensure everyone's comfort.
 10. **Take Your Time.** Take it slowly both with family meeting length and content. Give the agenda substance but avoid overload one or two heavy topics are enough in the early going. Some families begin with a three-hour meeting to set ground rules and plan the agenda and arrangements for the next
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meeting. Later, families may choose to move to half - or full-day format or even a weekend retreat.

Family meetings are their own reward. In the early stages, the process of meeting communication, sharing, building trust and openness, resolving conflicts is much

more important than tangible outcomes. Well-facilitated meetings help families find the strength to deal with the challenges that come with owning and managing their businesses.

To learn more about our firm and how we serve families like yours, call us at (773) 604-5005 or email us at info@thefbcg.com. There is absolutely no obligation.

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