

## How Assessment Tools Can Help Build a Foundation for Family Communication

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Remember Family Feud? The iconic game show that asks families to quickly answer simple questions like: "Name a place that's filled with people who don't want to be there." Family members shout out the most common poll answers. The host then drawls: "Aaannnnddd the survey says..." With the most frequent answers revealed, you can see which family contestant had their finger on the pulse of the survey respondents, hopefully leading to a Family Feud victory!

What if we asked you, "Name the most common challenge individuals face within their family business?" Quick! What do families across the world regularly identify?

The answer provided time and again is this: communication. We hear it in one-on-one conversations as we get to know individuals within families and businesses. These folks talk about not being heard, closed-mindedness, conflict, confrontation, and hurt feelings. We also read in written surveys that the lack of transparency and clarity of expectations are noted as barriers to health and success within family business systems.

The fact that communication is the most common answer is not surprising — any self-respecting Family Feud contestant should nail that answer! Effective communication is a huge contributor to trust and strong relationships — both of which are core to healthy individuals and effective, successful family enterprises.

Many leadership and development experts tell us that we are not born with communication skills; they must be developed. So, each of us has the ability to answer one of the top challenges in family business by investing in ourselves and improving our own communication skills. And communication is a very broad topic. So, where to start?



### Foundational Skills

As humans, we often voice communication frustrations by starting with how others behave. For example, they may not be accessible, be closed-minded, refuse to share information, or be defensive.

And yet, the most impactful place to start improving communication is with ourselves. A simple and challenging place to begin! The more aware we are of our own communication preferences and tendencies, the better we can get at two oft-neglected communication skills: active listening and giving feedback. These skills are well-covered in the popular press, both their elements and ways to build them. For families who own, work, play, and live together, skill-building can be most impactful as a group. Using an assessment tool offers a valuable opportunity to skill-build individually and together.

### Why Consider an Assessment?

Taking a communication, personality, or behavioral assessment as a family group offers a shared experience and a common language, immediately allowing individuals

in the system to share perspectives and experiences more effectively together.

When facilitated by a trained professional, sharing individual assessment results within a group session allows individuals to see others through a different perspective, or new lens. You may have entered the room as an older sister, a favorite uncle, or the black sheep. But after sharing your own assessment findings and learning about others, you create a new, common memory that can take away historical hierarchy and sometimes dispel historical perspectives. A well-done session should be both educational and fun, creating a team-building opportunity.

Additionally, an effective assessment creates a common language. You may have grown up together, but it doesn't mean you assign the same meaning to words! Add spouses, kids, generational differences, and knowing what someone means when they say, for example, "You're not hearing me" gets even more challenging. Effective individual and group experiences allow teams to align on definitions and meanings and to create shared understanding.

Any assessment that supports effective individual learning AND builds the group's effectiveness starts with raising your own self-awareness first, and then understanding those around you.

### When Does an Assessment Fit? Or NOT Fit?

Assessments that offer individual and group learning are best for families with moderate-to-high trust. Ideally, each individual in the system is healthy enough to be open to learning. Sometimes, learning does mean a level of discomfort. Only you can determine if that discomfort represents healthy stretching or a detrimental experience.

To fully take advantage of an assessment, your family should be ready to make the time, engage in the learning, and be willing to be vulnerable. The purpose of using an assessment is also important. Common motivations include beginning a project, forming a new group, or bolstering communication skills in preparation for making decisions together.

Assessments don't fit when individuals within a family are under extreme stress. They also are not an appropriate starting place for situations that include long-term, deep conflict, emotional cut-offs, or substance abuse.

## Case Studies: How Using Assessments Developed Individual Skills and Built Family Relationships

### Helped a newly formed work group start off strong

The Woodruff family formed an owners' council to help their growing shareholders group get to know one another better and find their collective voice. The first council included a representative from each family branch, along with a family director who would serve as liaison to the board. Ensuring each branch was represented on this new council was critical because there was a history of conflict among branches with perceptions that particular branches held power by withholding business information.

Initially, council members worked to align on shared goals for the owner council itself and for building new connections across family branches. To build credibility as advocates for improved communication throughout their family enterprise, they agreed that working to enhance their communication skills — both as individuals and as a new group — would demonstrate true commitment to the new, collective owners council. The group each took a behavioral assessment tool and learned about their own and others' styles during a three-hour interactive communication workshop led by a facilitator.

During the session, the council members got to know one another better, bonded over their newly discovered similarities, and shared a few laughs in the process. When it came time to select the first council chairperson, the group put their learning into practice to establish decision-making expectations. Additionally, the council believes the workshop's learnings will help prioritize family education topics and provide useful feedback on the family's collective communication style.

### Assisted a geographically dispersed team to work together virtually

A group of seven cousins from the Runwal family agreed to serve on a next-gen task force for their family. Several grew up playing and hanging out together, but since they headed away to school, those visits were few and far between. The cousins were now in their 20s and lived on two continents (Asia and North America), with one at university, three working in the family business, and three in graduate school. As they prepared to become active in their family's governance, they believed they needed to reconnect with one another at this stage in their lives.

The group agreed to be very intentional about getting reacquainted as independent young adults with varied life experiences. They believed this would be key to forming an effective task force. They selected an assessment tool to lend structure to their formation work and learn their communication strengths and potential blind spots. The cousins had logistical challenges in meeting virtually and working together, including coordinating across time zones and reconciling the differing needs of students and working professionals.

Learning about their different communication styles allowed them to quickly establish a fair process for setting meeting times that aimed to share the inconvenience. They also agreed to share agendas ahead and meeting notes within a set time frame, addressing some members' needs for more deliberative decision-making. The cousins credit these structures with enabling them to plan a very highly rated full family meeting.

### **Reenergized family meetings**

The Sanchez family has been meeting twice a year for nine years. Family council members noticed a growing diversity in communication expectations among members and generations. Some believed it was very disrespectful to ignore requests for meeting availabilities or input through surveys. Others were much more flexible and didn't mind sending repeated reminders and tracking folks down to ensure they were included. The frustrations turned into assumptions about other's commitment and desire to build the family. As a result, there were increased tensions at the in-person meetings. A family council member took part in a communication assessment at work and thought it could help her family reset. The family planning committee agreed and sought a facilitator experienced in both the assessment and applications within family businesses.

A few months later, the 28-member family gathered for a workshop after completing individual assessments and

reviewing their own results in advance. Each attendee shared a takeaway that the assessment helped them learn about their own communication needs. Nancy, the family CEO, felt a bit vulnerable in sharing that she learned it was easier for her to respond when her own perspective had been acknowledged and valued. Others found this insight unexpected as she was always a calm, grounding presence throughout her decades at the helm and seemed very independent.

The workshop continued, with more learnings on improving group communications. At the end of the day, Nancy stood and, in her customary selfless manner, thanked everyone for traveling to the retreat, making time for the family, and being engaged. Following her remarks, the family rose to their feet, offering Nancy a standing ovation and expressing gratitude for her leadership in advancing the workshop. Nancy was visibly pleased, clearly appreciating that the group had listened to her. The outcome was a heightened empathy toward each member's behaviors. Nancy wasn't the only one whose behavior had been misinterpreted; the group's commitment to slowing down to understand and value each individual had paid dividends in creating a warmer, more open group dynamic. Ultimately, this allowed the family to function at a higher level together.

### **Conclusion**

It is hard to argue against improved communication skills — for an individual or a family group. Pursuing them when you're in a family enterprise together, though, has the added benefit of modeling the vulnerability, joint learning, and improved skills necessary to build a successful, long-lasting family enterprise. Or, maybe these improved skills will pave the way for YOUR family to be Family Feud champions! Either way, the survey says, the payoff is priceless!

## How to Choose an Assessment for Your Family

A multitude of assessment tools exist – an incomplete list is below. The process and tool should offer the following features:

1. Most importantly, a great facilitator who has:
  - A style that fits your family culture — consider sense of humor (or not!), pace, formality, and experiences;
  - Deep experience in the assessment tool itself; and
  - Experience using the assessment within family business groups — not just work settings. The complex dynamics of a family that works and owns together mean that applying assessment results has added complexity in a family group.
2. Ease of administration
3. High readability and details for application included in the report
4. Easy access to digital copies of the report
5. Supporting resources
6. Appropriate cost per participant given the strength of the above features and your family's budget

Consider having a small group of family members (not just a single family member) choose a facilitator and assessment tool from a few options recommended by trusted colleagues or your family business consultant.

Examples of assessments that families use to skill-build:

- DiSC Assessment: Behavioral assessment
- Enneagram: Personality type assessment
- Kolbe Index: Assesses how people prefer to take action
- Insights Discovery Styles: Personality type assessment
- Myers-Briggs Type Indicator (MBTI): Psychological preferences and tendencies assessment

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