

# Before They Come to the Table: Why Individual Coaching Changes What Families Can Do Together

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The room is set. The facilitator has prepared carefully. The advisors have aligned. And then the family sits down to talk. Within 20 minutes, a dynamic has taken hold that no agenda can redirect. A parent's familiar tone of certainty closes down the room. A sibling's silence signals the withdrawal others have learned to read as a veto. A next-generation voice that has something important to say finds no opening and stops trying.

No amount of skilled facilitation can fully compensate for the preparation that didn't happen before anyone walked through the door.



## The Invisible Work

When families engage advisors to navigate the transitions that define an enterprise — leadership succession, ownership transfer, wealth stewardship — attention lands on the collective: the family meeting, the shared document, the governance structure. But something important often goes unaddressed: each individual who enters that room is carrying their own history, their own patterns under stress, and their own unvoiced version of what they hope for.

Those patterns don't disappear when the meeting starts. They operate. A family member who has never found a way to express a difficult view without becoming defensive will bring that into the room. A sibling who has always played peacekeeper and is beginning to resent it will default to that role under pressure, and the resentment will surface in ways no one will name.

Unresolved history is especially insidious. A family member who never felt their contribution to the business was fairly recognized might carry that wound into every subsequent conversation about what they are owed. It rarely shows up as a direct statement about the past. Instead, it may surface as an inexplicable rigidity when the family is trying to agree on something practical — like how to structure distributions from a shared trust.

Individual coaching addresses precisely this. A coach working privately with a family member helps them prepare not by scripting their position, but by helping them understand their own patterns well enough to choose a different response. Such preparation benefits not just the individual, it is a gift to everyone at the table.

## What Coaching Does and Doesn't Do

Coaching here is not remediation. It is a focused, confidential conversation between a coach and a family member preparing to participate in something consequential. The coach is not there to assess, fix, or report back. They are there to help one person become a more effective participant in their own life, and by extension, in the conversations their family is about to have.

In practice: a founding parent preparing to speak honestly about why they structured a trust the way they did, in language their adult children can actually receive. A next-generation member who has never named what they want from the family enterprise, learning to say it clearly without being combative. A sibling who tends to escalate under pressure, learning to recognize the moment it starts and practicing a response that keeps them in the conversation rather than ending it. Most of this happens in a handful of sessions. The effects in the room are often immediate.

*The family members who benefit most from coaching are rarely the ones with the most visible difficulties. They are the ones with the most insight and the most genuine desire to contribute.*

## One Person Changes the Room

When one person develops even a small measure of skill at expressing a difficult view without defensiveness, the entire conversation shifts. A founding parent who learns to speak about trust and control as separate decisions can unlock a discussion that has been stuck for years. [A next-generation member who learns to name](#) what they actually want changes the information everyone else is working with. A sibling who steps out of the peacekeeper role changes the dynamic that has always pressed others into corners.

This is the real case for individual coaching in family systems work. The goal isn't to identify who needs fixing. It is to raise the quality of a shared conversation, one participant at a time.

## On the Reluctance to Engage

Some families hesitate at the idea of individual coaching. There is a worry that it signals something is wrong with the person receiving it. There is a concern that a coach will build a separate agenda, or that coaching one family member will create an imbalance with others. These concerns deserve a direct response.

Coaching does not signal deficiency. The family members who most benefit are those with the most insight and the most genuine desire to contribute. Coaching is preparation — the same kind any skilled professional undertakes before a high-stakes conversation. Coached family members tend to arrive less positional and more curious, having already done the work of naming their own fears and wants. When more than one family member has access to this support, imbalances are addressed rather than created.

In families where coaching is framed as preparation rather than remediation, the family develops a culture in which growth, not performance, is the expected posture when hard conversations emerge. Coaching is most valuable before a significant family meeting; before a next-generation member steps into a new leadership role; before a long-avoided conversation can no longer be deferred; or when a facilitator observes that a family member is consistently unable to access what they need in the room.

## The Family That Learns Together

When coaching is integrated into the planning process rather than offered as a separate intervention, something significant happens over time. As more family members experience this kind of preparation, the family develops a [shared language for honest communication](#). They name patterns more easily, recover from difficult moments more quickly, and build a tolerance for productive disagreement, making every subsequent conversation less fraught.

What the family builds in those conversations is not separate from the plan: it is the relational foundation that holds the plan in place. The documents record agreements. The coaching helps a family become capable of keeping them.

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