

FAMILY BUSINESS ALLIANCE

250 Monroe Ave., Suite 150 | Grand Rapids, MI 49503



# LEADING FORWARD

THE INSTITUTE TO DEVELOP AND INSPIRE FAMILY BUSINESS LEADERS

[fbagr.org](http://fbagr.org)



# ABOUT

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## LEADING FOWARD

*The program will create individual development and relationship-building opportunities for now-generation leaders who have completed the succession transition and are committed to preserving the family business and developing the tools to increase their capacities to influence and lead within their families, organizations, and communities.*

*Participants will benefit from observing live case studies of successful family businesses, engaging in interactive facilitated sessions, and hearing from other local business leaders who will share their visions and personal beliefs about leadership.*

DESIGNED FOR  
NOW GEN  
LEADERS

SMALL GROUP  
SETTING

FAMILY  
BUSINESS  
GUEST  
SPEAKERS



EXPERIENTIAL  
LEARNING

INDIVIDUAL  
COACHING  
SESSIONS



# CURRICULUM

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## *SESSION ONE: HARNESS YOUR LEADERSHIP STYLE*

In this workshop participants will explore the five practices of Values Based Leadership – Build Awareness, Realize Potential, Develop Relationships, Take Action, and Practice Reflection – and identify the core values and beliefs that influence their behaviors, decisions, relationships, and ultimately effectiveness. This session includes the personality instrument Insights ® Discovery – a tool that helps participants to identify their personal style and that of others. Participants will explore personality style as a key leadership tool – learning communication preferences and how to connect and inspire others through their unique leadership vision to achieve desired outcomes.

## *SESSION TWO: BUILDING YOUR LEADERSHIP TEAM*

In this workshop, participants will learn how to approach team development in a holistic and inclusive manner. This workshop will help leaders identify how to assemble, structure, and ultimately manage teams to their highest levels of potential while exploring and analyzing family business continuity challenges and best practices for successfully leading family-owned businesses.

## *SESSION THREE: DEVELOPING AN EFFECTIVE BOARD*

In this workshop, participants will explore how to develop a Board that is prepared to effectively help facilitate transitions, clarify issues, assure proper management planning, foster sharing of information, and provide stability and continuity during times of change. Participants will identify short and long-term areas for improvement and how to provide support and structure to ensure the Board's expertise, experience, and compensation is aligned with their strategy and goals.

## *SESSION FOUR: IGNIGHTING INNOVATION*

In this workshop, participants will learn how to reignite the spirit of innovation upon which their family business was founded upon in the first place. They will explore the idea that adaptability is key to innovation and learn how to respond flexibly and creatively to constantly changing, and oftentimes unpredictable, environments by cultivating a family enterprise mindset. Participants will then assess their family enterprise's strengths, weaknesses, opportunities, and threats, as well as synthesize market trends and customer data to begin developing a plan that will deliver value for all stakeholders.

## *SESSION FIVE: IMPLEMENTING VALUES AND CULTURE*

In this final workshop, participants will explore their role in leading and enabling their family and family business's culture in alignment with strategy to achieve desired outcomes. They will build an engagement roadmap for the future using the Five Practices of Values-Based Families: Celebrate Legacy, Include Everyone, Build Unity, Envision the Future, and Sustain Connection. Participants will also present their personal leadership visions (that they will have been working on with their coaches throughout the program) and how they are putting their visions into action.

# COACHING & FACILITATORS

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## INDIVIDUAL COACHING

This is a five-month program that features five half-day in-person workshops and includes one-hour individual coaching sessions.

Before the program, each participant will be matched with a certified coach. Between each workshop, the certified coach will meet with the leader virtually to identify goals, practice new skills, gather feedback, and make choices that align with values to bring about individual and organizational success. The coach will work with the leader to develop an Individual Leadership Development Plan enabling each leader to continue their leadership journey well-beyond the end of the program.

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## FACILTIATORS

The program will be facilitated by InnerWill Leadership Institute and Family Business Consulting Group. Born out of Luck Companies, the largest family held, and family run aggregate family business in the country, InnerWill was founded to teach leaders how to build values-based organizations which ignite the potential in people. Dr. Thomas Epperson, InnerWill President, Facilitator and Coach has over 20 years of experience working with family leaders to transform their organizations. He is a certified business coach and has a Doctorate in Leadership from The George Washington University.

Family Business Consulting Group helps thousands of enterprising families create a foundation for better business performance and stronger families. Joe Schmieder, Senior Advisor, helps family-owned organizations increase their value through the careful guidance of family succession and the resolution of complex family business issues. In addition to his consulting practice, he has authored the book *Innovation in the Family Business: Succeeding through Generations* and numerous family business articles.



*InnerWill Institute*

**DR. THOMAS EPPERSON**



*Family Business Consulting Group*

**JOE SCHMIEDER**

# SCHEDULE

Applications Open	February 1, 2023
Application Deadline	March 15, 2023
Participant Notification	April 15, 2023
Welcoming Reception & Introductions	August 8, 2023   3:30 pm
Harnessing Your Leadership Style	August 9, 2023   8:00 am
Building Your Leadership Team	September 13, 2023   8:00 am
Developing an Effective Board	October 13, 2023   8:00 am
Igniting Innovation	November 9, 2023   8:00 am
Implementing Values and Culture	December 14, 2023   3:30 pm

Each session is four hours and individual coaching sessions will be scheduled between each session. Group sessions will occur at FBA Offices at The Grand Rapids Chamber.

## FEES

*Member Price*

**\$4200**

*Intro to Membership  
and Program*

**\$5000**

**APPLY  
TODAY**

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