

The background of the top half of the image is a dark blue, textured surface. Scattered across this surface are several light-colored wooden puzzle pieces. One large piece is in the top left corner, another is in the center, and two others are in the bottom left and bottom right corners. The title 'SUCCEEDING AT SUCCESSION' is printed in white, bold, sans-serif capital letters in the upper right quadrant.

# SUCCEEDING AT SUCCESSION





ROB SLIGH  
(616) 834-3299  
SLIGH@THEFBCG.COM



Rob is a senior consultant for The Family Business Consulting Group, helping enterprising families with business ownership and leadership succession, creating and improving family business fiduciary and advisory boards, planning and facilitating family and family council meetings, and guiding strategic planning processes.

Prior to joining FBCG, Rob spent 33 years in multi-generational family business leadership. Initially in brand management at SC Johnson for several years, he went on to become Chairman and CEO of Sligh Furniture and Clocks, a 4th generation manufacturing and marketing company with a majority-outside board of directors.

He served on more than 20 family business fiduciary or advisory boards and non-profit boards. On many of those, he served as Chairman of the Board and / or Chairman of the Compensation, Finance or Nominating Committee.



TOM EMIGH  
(616) 481-9185  
EMIGH@THEFBCG.COM



Tom Emigh is a Principal Consultant with The Family Business Consulting Group motivated by Mission, Values, and Leadership.

Tom believes that excellent organizations, full of empowered leaders, can have a positive impact in our society to help all people grow and learn. Tom's ability to quickly establish rapport and trust with all members of the business-owning family makes him a thoughtful mentor, coach, and facilitator as he encourages others to understand and reach their full potential.

Tom has extensive experience in working with family businesses, growing and developing multiple generations, guiding succession implementation, developing curricula, and teaching in a variety of contexts. He brings real-world leadership experience, systems thinking, and operational expertise to coaching and consulting relationships in large and small organizations.

# SUCCEEDING AT SUCCESSION

## ADVANCE PREPARATION

1. Prior to session 1, read Family Business Succession: Your Roadmap to Continuity, Chapters 1 & 2.
2. Bring to session your existing Owners Vision, Values, and Expectations for Business Performance. Or, create a draft prior to the session.
3. Complete the Advanced Preparation Worksheet (page 3 -4)

## SESSION ONE - WHERE ARE WE

### Agenda

- Introduction and Workshop Overview
- Sharing your Family Business Story and Vision
- Vision, Values, and Expectations for the Business

### Homework:

1. Read chapters 3-6 of FBCG's Family Business Succession: Your Roadmap to Continuity and Complete Transition Options Worksheet (page 5 -6)

## SESSION TWO-TRANSITION OPTIONS

### Agenda

- Ownership Skills, Experience, and Attributes of Future Leaders Roles
- Requirements for Family Members
- Board of Directors Family Governance

### Homework:

1. Read chapters 7-8 of FBCG's Family Business Succession: Your Roadmap to Continuity

Build upon the answers developed before and during Workshops #1 and #2, taking into account the feedback and experiences shared to create a transition plan or draft plan for your business to be discussed with family enterprise stakeholders before Workshop #3. Include in the plan who will do what by when and an envisioned accountability forum to help the process stay on track. (page 7 - 8)

## SESSION THREE - PLANS & ACCOUNTABILITY

### Agenda

- Transition Plan Review
- Developing Accountability
- Program Conclusion

# ADVANCE PREPARATION WORKSHEET

**Based on reading Chapters 1 and 2, any existing owners, vision, values and expectations, family discussions, complete the questions below prior to Session One - Where Are We.**

What is the purpose of proactively engaging as an extended family? Of staying together as family enterprise owners? (It may be that extended family owners share beliefs about human nature, family enterprise culture and legacy, and directions for the fruitful investment of time and money. They may see themselves as stronger together, culturally, competitively, and financially than if they went their separate ways to pursue different dreams. Those are the kinds of things that can represent a strong purpose for proactively engaging extended family or staying together as family enterprise owners.)

What is the growth, risk, profit, and liquidity we expect from the operating business?

What is our anticipated or ideal timeline for the transition of leadership? Of ownership?

## ADVANCE PREPARATION WORKSHEET

What are some issues or concerns that we're bringing to this process? (You may answer something like, How do we start a governance structure? Or, How do we prepare the next generation for leadership? Or ownership? Etc.)

# TRANSITION OPTIONS WORKSHEET

**Based on reading Chapters 3 - 6 and discussions from Session One, complete the following questions prior to Session Two - Transition Options.**

Who will own the business in the future?

How and when will ownership be transferred?

What skills, experiences, and attributes define an optimal future leader for our organization?

To what extent, will family or non-family members currently inside or outside the organization likely fill top leadership needs in the future and likely when?

# TRANSITION OPTIONS WORKSHEET

## CONTINUED

What are or should be the requirements for family members aspiring to be board members or leaders in the organization?

What is or could be the roles of a Board with independent directors in our business?  
What is or could be the role of family governance in our family and family enterprise?

What is or could be the role of family governance in our family and family enterprise?

## TRANSITION PLAN AND ACCOUNTABILITY

Based on Reading Chapters 7 & 8, Build upon the answers developed before and during Session One and Two, taking into account the feedback and experiences shared to create a transition plan or draft plan for your business to be discussed with family enterprise stakeholders before Session Three. Include in the plan who will do what by when and an envisioned accountability forum to help the process stay on track.

