

FAMILY BUSINESS ALLIANCE

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



LEADING FORWARD

A TAILORED PROGRAM TO DEVELOP AND
INSPIRE FAMILY BUSINESS LEADERS

fbagr.org

ABOUT

LEADING FOWARD

The program will create individual development and relationship-building opportunities for current family business leaders who 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.

"Leading Forward was fantastic! I have strongly recommended it to my friends and peers."

*Todd Van Haren,
SecurAlarm*

"It was great content and discussion. I also really enjoyed making new connections with other family business leaders."

*Ross Haan,
Impact Fab*

**BIG CHANGE
STARTS WITH
BIG IDEAS**



"This program provides a high-level overview of all the important aspects to leadership in the family business."

*Brandon Bissell,
5thGEN*



CURRICULUM

SESSION ONE: HARNESS YOUR LEADERSHIP STYLE

Explore the five practices of Values Based Leadership, and identify the core values and beliefs that influence behaviors, decisions, relationships, and ultimately effectiveness. 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.

- *An assessment of my existing leadership profile and the recognition of how it will best serve my organization.*
- *How is my leadership style different than the previous generation.*
- *How to communicate more effectively – translating my vision for the organization and implementing a culture shift based on leadership styles.*

SESSION TWO: LEVERAGING THE FAMILY SYSTEM

Learn to view the business through the lens of Family Systems Theory to understand and successfully manage family business issues. Participants will explore the emotional interdependency of family members and the multigenerational family system's significance – uncovering how to function more effectively in their family and social/work groups.

- *How to define the goals of the family and the goals of the business while sustaining family harmony*
- *How to address family dynamics that might stifle growth and succession*
- *How to navigate family business conflict*

SESSION THREE: CREATING STRATEGIC ALIGNMENT

Successful, multi-generational family-owned enterprises have a strategy that is focused at the enterprise level, rather than at just the business level. During this session, participants will explore the interconnectedness of the three circles (Ownership, Family, Business) and why their missions, visions, goals, values, and plans should be aligned, consistent and mutually supportive.

- *How to identify the family's mission, values, and goals*
- *How to articulate the family enterprise strategy and create engagement from all the family members including the next generation both in and out of the business*
- *How to implement the structures and processes to support, measure, and evaluate alignment*

SESSION FOUR: DEVELOPING AN EFFECTIVE BOARD

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.

- *How to architect the right board(s) for your family enterprise*
- *How the board reconnects with, and advances, the vision for the future.*
- *How to effectively run a board meeting to create the most impact.*
- *How to maximize agendas and evaluations to accomplish objectives.*

CURRICULUM

SESSION FIVE: UTILIZING GOVERNANCE & OWNERSHIP STRUCTURES

Learn the specific ownership, stewardship, tax, transition and wealth management issues that affect family enterprises. Participants will explore and analyze family business continuity challenges and common practices for successfully leading family-owned businesses.

- *How to provide a consistent voice from the family for the business's adherence to the mission, vision, and strategy of the firm and the family*
- *How to communicate key issues, both within the business and family*
- *How to create a forum for family and family business matters and foster the development of new ideas (philanthropy, family retreats, policies, etc).*

SESSION SIX: CAPSTONE PRESENTATIONS

During this session, each participant will present to the other program participants their unique program capstone. At the beginning of the course, each participant will be identified with a family business coach that will work with them to identify a specific goal and outcome they would like to develop throughout the work in this program.

COACHING & FACILITATORS

INDIVIDUAL COACHING

This five-month program features six 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.

FACILTIATORS

The program will be facilitated by InnerWill Leadership Institute. 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.



InnerWill Institute

DR. THOMAS EPPERSON

SCHEDULE

Applications Open	March 1, 2024
Application Deadline	May 15, 2024
Harnessing Your Leadership Style <i>Cohort Dinner to Follow</i>	August 20, 2024 12:00 pm
Leveraging Family Systems	September 18, 2024 8:00 am
Creating Strategic Alignment	October 9, 2024 8:00 am
Developing an Effective Board	October 30, 2024 8:00 am
Governance and Ownership Structures	November 20, 2024 8:00 am
Capstone Presentations <i>Program Reception to Follow</i>	December 12, 2024 1:00 pm

Unless otherwise noted, each session is four hours. Individual coaching sessions will be scheduled between each session.

FEES

Member Price

\$4500

Non-Member with
Intro to Membership
Price

\$5200

APPLY
TODAY

