Consultation to Family-Owned and Closely-Held Businesses
Frequently Asked Questions and Concerns

"I'm an independent person and I should fix my own problems."
The need to assess family relationships affecting a business is no different than the need to assess all other areas critical to achieving one's goals. One relies on attorneys for legal issues, accountants for financial issues. A family business consultant with a family systems background can help sort out how family dynamics and management roles and responsibilities overlap.

"Yes, but if we need a consultant for our family relationships, that means we're 'dysfunctional', that our family is not working right."
A family business consultant is brought into a business as a facilitator, not as a doctor. Each person has the opportunity to tell his/her point of view. While it is important to put all issues that affect the family business on the table, family members are assured that each individual has control over what he or she reveals and that individual privacy is respected. The goal is to help a family maximize its strengths, to help it work better as a team and to become more effective problem-solvers.

"I'm worried. Tension is high enough among us. If we bring in a psychologist, she'll stir up issues that are better left alone. People will get angry and leave with hurt feelings."
All the more reason to have a dispassionate party involved in the process. Of course when issues such as values, fairness, accountability, and past injuries are part of the picture, they give rise to strong emotions. The question becomes not whether feelings get stirred up, but what happens next? Is the information used in a way in which people can better understand and respect one another, or does the discussion escalate unproductively?

It is important to begin with an assessment. Meetings are carefully planned so that the intensity of emotion does not get out of hand. Family members may be assigned homework to be done prior to larger group meetings. Information may be exchanged ahead of time so that there aren't painful surprises.

"How does this work?" "Do we bring everybody together once, air the issues, and then get back to business?"
Unfortunately, single-session, cathartic meetings have only limited value. The focus of family meetings is on building a structure and code of conduct that will last over the long run after the consultation. The typical sequence includes:

1. An initial meeting with 1-3 family representatives who meet the consultant and give an overview of the situation.
2. If they give the go-ahead, the consultant begins an assessment by meeting separately with key persons.
3. The consultant's assessment is fed back to the group as a whole in a family meeting.
4. The meeting ends with agreement as to what kinds of meetings (with owners, with family members and/or with those working in the business) will be most helpful to move ahead.

"How long does this process last?"
Some families find that the assessment process by itself clarifies their issues and points a way for them to proceed on their own. Others recognize that they need the outside perspective and facilitation until they are more confident of new ways of working together. This may include monthly meetings, quarterly Family Council meetings, individual coaching, or meetings among a

few individuals to clear the air and improve team functioning. Each family business makes its own contract with the consultant.