

TO THE HEART OF FAMILY BUSINESS

INTEGRATING FAMILY AND BUSINESSES TO CREATE LEGENDARY INSTITUTIONS

Family businesses are in excess of 85% of the developed countries economies. However, most of research and business knowledge does not effectively collect the specific rules and distinctions to create a sustainable, profitable and cohesive family business.

Business continuity is naturally challenged by succession processes in the family institution. The integrating of family and business is not an obvious task. Family responds to “socialist” principles and the enterprise to “capitalist” propositions. Combining both visions require a profound knowledge of both worlds and a fine art.

Managing throughout multiple generations requires synchronizing a quotient: the family growth and the business growth. Deciding with both mind and heart is more necessary in this type of businesses.

Understanding the interrelationships between ownership, intra family dynamics and executive work is not trivial at all. Mixing up these three core themes and its different needs may risk the sustainability, profitability, affection and integration among the family members.



 Strateology® Deep understanding of contextual, strategic, and competitive decision-making processes. Distill conceptual approaches into executable plans to win the battle of the marketplace.	 Innovation These days, markets change at the speed of light. Business models, technology, and new products and services make organizations seemingly obsolete overnight. Anticipate where your organization needs to inject incremental, semi-radical and disruptive innovation.	 Clienting® Improve your “customer capital.” Master the knowledge of your customers, your value proposition, and your market positioning to activate your sales teams and gear them for outstanding organic growth and client loyalty.	 Leadership The enhancement of management skills to create a positive impact on the leader—developing more effective relationships and cohesion to forge a healthy culture.
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MAIN BENEFITS

Understand the primary drivers of the family and the business. Family needs and business needs.

Recognize and question the myths around family business. Learn about size, longevity and profitability in relative terms to non-family corporations.

Three roles in the family business: ownership, family relationships and executive work and the factors that integrate and separate the three different roles.

Learn in what phase is your business and if your problems are normal, abnormal or risk your business to death. Tools available to resolve them.

Organizational governance and structure in the enterprise and in the family. Communalities between the two. Sources of remuneration: enterprise worth, dividends and compensation. The family protocol.

The four kisses of premature death of the family business and the unanswered questions by the family businesses that perish.

Family business continuity. Identify whether your business is designed as an institution or an "owner" business.

Organizational structures for a healthy governance of the family and the corporation. Non-family executives, collegial bodies (board of directors, executive committee), family board, etc. Conflict and communication.

WHO SHOULD ATTEND THIS PROGRAM?

Presidents, CEOs, general managers, vice-presidents and directors.

Board of directors and executive committee's members. Financial executives, marketing, human resources, trading partners, sales, business development, client management and strategy executives.

Consultants, University professors, Coaches.



CONTENT AND AGENDA

SESSION 1: DIFFERENT REALITIES OF SENSITIVE CONCILIATION

Family business fundamentals. Family grows exponentially overtime; businesses grow at a slower pace. Managing business versus family growth. Balance between family size and business size. Business responds to “capitalist” criteria and family to a “socialist” paradigm. Integration of both realities is not easy. Family needs and business needs are not the same. Clarity on the roles is fundamental. The family DAFO; does the family supports or is a burden to the business? The challenge of the long term profitability. Is it more a business or a family?

SESSION 2: AN EXPLORATORY LOOK TO THE FAMILY BUSINESS FUNDAMENTALS: A MARKET VIEW.

A look to size, longevity and profitability of family businesses. Clarity about competitive positioning of the family business. Market configuration and the best competitive space for your organization. The family DNA and the business DNA; decode your competitive genome and the sequence for your organization. The merchandise of kings to nurture, the differentiations of your organization and why you deserve to earn winning the market and clients battlefield. Integration of the four elements of the business model and put the profitability and sustainability levers to work synchronously.

SESSION 3: PHASES AND TRANSITIONS IN FAMILY BUSINESSES

Family business is better equipped to prevail over time. Understanding the different cycles of the business and the family helps to identify the natural problems you face and those that challenge your business survival. Like any other business, family business goes through different development cycles. The four “kisses of premature death” of the family business and how to anticipate and resolve them. Taking the organization to Prime and how to manage family transitions.

SESSION 4: GOVERNANCE, STRUCTURES AND PROCESSES

Managing relationships with intelligence and heart makes the family to be a competitive advantage or disadvantage. A well-structured governance bodies and decision processes and assign the best professionals to each is a well needed art to differentiate in the market place. External executives and the dynamics; relationships with the family. Family board and board of directors that contribute with value to the business. “Paper-made” board of directors. Does your company have the right shareholders? The role of the Chief Executive Officer in the shareholders meeting. The “glass ceiling” of the non-family CEO.

SESSION 5: FAMILY AND BUSINESS RELATIONSHIPS

Relationships are the “Achilles heel” or a competitive thrust. Understand the different nature of relationships, potential natural connections and risks of conflict. The subjacent rules underneath contract and affection based relationships. Financial and emotional ownership. The compass and the map: the family protocol. Family agreements and the four positions to conquer together: why are you a family business, what type of organization you want to become, what to expect from the family business, when to stop being a family business. Common purpose as the fertilizer to legacy.

SESIÓN 6: COMPENSATION, CONTINUITY AND SUCCESSION

Financial value creation: company worth, dividends and employment remuneration. Managing the three elements with balance and without confusion. Continuity requires a healthy management of the business and early succession plans. Ownership is inherited, talent may not. Succession is predictable and therefore need to be planned well in advance. The successor and predecessor profiles; transitions management and the four characters. Is co-leadership the right answer? Anticipate the five missiles to the continuity of the family business floating line. Managing with criteria different to market rules may take you out of the market.



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- Educate in business
- Inspire to action
- Connect with Greatness



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I Interest

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