



THE FAMILY MEETING

TO GET THE FAMILY THINKING

Distribute “Conversation Starters” to all next generation family members.

Sample explanation: *“We’ll be scheduling a family meeting soon to talk about how each of us would like to be involved in the future of our operation. Before then, please give some thought to these questions and make notes, so that we can have a productive conversation and begin to identify the next steps.”*

Notes:

SCHEDULE THE MEETING

What are the specific and attainable objectives for a family meeting:

1)

2)

3)

INCLUDE DISCUSSION TOPICS SUGGESTED BY OTHERS

To add:

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ESTABLISH MEETING GROUND RULES

- Involve all active family members.
- Don't personalize issues. (No 'us versus them')
- Stick to the agenda. Don't re-hash old grievances.
- Listen without judging. Hear each other out.
- Seek common ground and mutual benefits.
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- End with an action plan detailing next steps, who's responsible, and time frames.

CONCLUDE WITH FOLLOW-UP

Follow up to ensure:

Participation –

Accountability –

Commitment –

Time/Date:

Location: