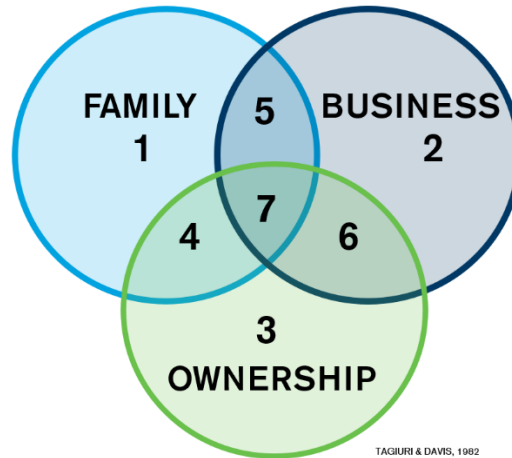


Family Business Success Seminar: Navigating the 3-Circle Model



This seminar can be modified to meet your audience needs. It is recommended for Family Business Ownership and Trusted Advisors of family businesses. It carries FP Canada CE Accreditation of 1.5.



ACCREDITATION
CANADA

Based on the Three-Circle Model of family business, the session objectives and outcomes for a family business seminar would include:

Objectives:

1. Understanding the model: Introduce participants to the Three-Circle Model, explaining how it delineates family, business, and ownership as interconnected but distinct aspects of a family enterprise.
2. Identifying challenges: Help attendees recognize the unique challenges that arise from the overlap of family, business, and ownership circles.
3. Improving communication: Teach strategies to enhance communication across different stakeholder groups within the family business system.
4. Governance structures: Explain the importance of establishing proper governance structures for each circle (family council, management team, board of directors).

Outcomes:

1. Enhanced awareness: Participants will gain a comprehensive understanding of the complex dynamics in their family business.
2. Conflict resolution skills: Attendees will learn techniques to address and mitigate conflicts arising from the intersection of family, business, and ownership interests.
3. Strategic planning: Family business members will be equipped to develop more effective strategic plans that consider all three circles.
4. Succession planning: Participants will understand how to approach succession planning holistically, considering family, business, and ownership perspectives.
5. Stakeholder management: Attendees will learn to recognize and address the legitimate interests of seven distinct stakeholder groups within the family business system.
6. Long-term vision: Participants will be prepared to create a sustainable vision for their family business that balances family harmony, business performance, and ownership goals.



By achieving these objectives and outcomes, family businesses can enhance their resilience, improve decision-making processes, and increase their potential for multi-generational success.

Delivery

The session on the 3-Circle Model will be delivered by **Tammy Buss**, founder of BlueRoots, with a focus on interactive and practical learning with use of a PowerPoint presentation, development focused take away worksheets and graphics.

The delivery will include:

Key Delivery Approaches

- Introduction to the Harvard Business School-developed 3-Circle Model
- Interactive sessions to apply concepts immediately
- Strategies for understanding family business dynamics
- Practical tools for navigating complex family business challenges

Session Highlights

- **Interactive Learning:** Participants will gain hands-on insights into managing family, business, and ownership circles
- **Expert-Led:** Delivered by Tammy Buss, a family business advisor with 30 years of experience
- **Comprehensive Coverage:** Addressing communication, hierarchy, and emotional challenges in family businesses.

Target Outcomes

Discover strategies for:

- Achieving business success
- Strengthening family ties
- Ensuring enterprise longevity
- Preparing for multi-generational business transitions

The session is designed to be engaging and practical, offering valuable insights for both current and potential family business owners.

Take Aways

Attendees will receive a BlueRoots package that includes worksheet pages to help attendees dive into the dynamics of their business, giving them the ability to immediately implement the knowledge they have learned.