



CENTER FOR
GLOBAL BEST PRACTICES

“Enhancing Global Competitiveness Through Best Practices”

PROFESSIONALIZING THE FAMILY BUSINESS THE RIGHT WAY

TUESDAY, MAY 11, 2027 * 1:30PM TO 4:45PM via ZOOM

COURSE OUTLINE

A. Professionalizing the family members

- a. Assessing the maturity level of the family business
- b. Providing the right training and developing capabilities
- c. Identifying family leaders, complying with the founders wishes and negotiating family concessions
- d. Defining roles and responsibilities
- e. Making sure that everyone is on board to professionalizing the business
- f. Crafting the family constitution
- g. Aligning compensation structures and benefits (dividends, advances and benefits of family members).
- h. Crafting succession plans

B. Professionalizing the business operations

- a. Establishing governance structures (clarifying reporting lines and developing written policies and procedures)
- b. Conducting strategic planning
- c. Implementing risk management processes
- d. Putting in internal controls and internal audit activities
- e. Protecting the business from fraud and abuse.
- f. Improving business operations and processes
- g. Addressing regulatory and compliance issues (i.e. tax, financial records, etc..)
- h. Developing a professional brand strategy (and aligning the company's environment)
- i. Hiring the right professional advisers

For query, consulting requirements or request for in-house training programs, please contact:

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