

SKM Associates LLC

*Developing High Performance
Leaders and Organizations*

FAMILY BUSINESS CHECK-UP

1. Our family has a shared vision for our Family Legacy and the future.
Yes _____ No _____ Not Sure _____
2. Our family has clear and distinct values that guide our business policies.
Yes _____ No _____ Not Sure _____
3. When our family has disagreements, everyone is willing to work hard to develop a mutually agreeable outcome.
Yes _____ No _____ Not Sure _____
4. We have a written development and succession plan for the next generation.
Yes _____ No _____ Not Sure _____
5. We have a Non-Family Board of Directors who meet regularly and provide guidance and advice for our business.
Yes _____ No _____ Not Sure _____
6. We have a written Employment and Compensation Policy for family members entering the business.
Yes _____ No _____ Not Sure _____
7. We clearly and fairly evaluate the performance of family members working in the business.
Yes _____ No _____ Not Sure _____
8. Our family enjoys Holidays without focusing on the business.
Yes _____ No _____ Not Sure _____
9. Our family relationships are free from suspicion and questioning others' motives.
Yes _____ No _____ Not Sure _____
10. Our family has defined success and happiness.
Yes _____ No _____ Not Sure _____
11. We have successful family meetings.
Yes _____ No _____ Not Sure _____
12. There is family agreement on the appropriate use of profits and philanthropy.
Yes _____ No _____ Not Sure _____
13. Management decisions are not influenced by family dynamics.
Yes _____ No _____ Not Sure _____
14. As a family we are able to resolve differences and major conflicts.
Yes _____ No _____ Not Sure _____
15. Our family takes time to work "On" the business, not just "In" the business.
Yes _____ No _____ Not Sure _____

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