Edelman & ASSOCIATES

FAMILY MEETING PROGRAM

75–90 minutes | Case-based | Multi-generational

Practicing Better Decisions Together

Facilitated Case Study Discussions for Enterprising Families

Why this program

Annual family meetings often include updates, presentations, and discussions of current family or enterprise issues. A facilitated case study offers a different kind of engagement: an opportunity for family members to practice making consequential decisions together without beginning with one of their own unresolved issues.

A carefully selected case creates enough distance to examine succession, ownership, family roles, leadership readiness, governance, or stewardship openly. The learning experience is self-contained and can be adapted to the family's interests.

An example of a case discussion

A successful family-owned business is preparing for its next stage of growth. Several members of the next generation want to become more involved in decisions about the company's future. Some work in the business while others have pursued careers elsewhere.

The family is considering inviting next-generation members to attend board meetings as nonvoting observers. Some senior family members see this as an opportunity to develop responsible owners and future leaders. Others question whether the younger generation is ready. The management team is concerned about maintaining clear lines of authority.

Should the family introduce board observer roles now, establish a preparatory education program, or pursue another approach?

Participants explore what the family hopes to accomplish, whose interests and responsibilities need to be considered, and the implications of different choices for ownership, governance, and leadership development.

What family members experience

What participants practice

- Identify the underlying decision and the people affected
- Notice how family members frame the same situation differently
- Clarify what a good decision must accomplish or preserve
- Compare alternatives and consider their implications
- Practice listening, inquiry, and collaboration across generations

How the session works

Family members read or hear a short case and work through it in stages. The facilitator helps participants clarify the context, surface different perspectives, and consider credible choices before moving toward action.

Cases may be developed specifically for the family or selected from Harvard Business Publishing, Babson College, and other academic sources, with published materials licensed as needed.

A practical framework to take away

COImpAct: Context → Desired Outcomes → Options → Implications → Decision / Action

The framework gives participants shared language for thinking through future family and enterprise decisions.

Paul Edelman, PhD, PCC | Executive Coach & Family Enterprise Advisor paul@edelmancoaching.com | 508-947-5300 | edelmancoaching.com

Why case studies work for families

A case offers a rehearsal space. Because the circumstances are not the family's own, participants can disagree, test ideas, and notice patterns without feeling personally exposed.

Rising-generation members hear how senior family members think about risk, responsibility, and authority. Senior family members hear how the next generation understands fairness, readiness, purpose, and voice.

Advisors can observe how family members reason together without requiring discussion of a current family disagreement.

What the family takes away

Family members leave with a shared experience they can draw on when facing decisions of their own. Having practiced identifying the interests involved, clarifying desired outcomes, and considering the implications of different choices, they have a common reference point for future conversations.

Topics and formats

Possible themes

- Rising-generation leadership and ownership responsibility
- Succession, governance, and board readiness
- Philanthropy across differing values and priorities
- Balancing family voice and business authority
- Decision-making under pressure

Typical formats

- 75–90 minutes: a focused case for an annual family meeting or retreat
- Half day: deeper small-group discussion and application
- Series: linked discussions for owner groups, family councils, or rising-generation programs

A useful option for advisors and family offices

The program is a bounded, self-contained engagement that complements the work of the family's existing advisors. The advisor remains the ongoing relationship holder, while I facilitate a focused case discussion that gives family members a substantive, engaging learning experience. The session can be incorporated into annual family meetings, retreats, family office education programs, or advisor-led client programs.

Experience and additional case formats

I have facilitated case discussions for the Private Directors Association (PDA) Certificate Program in Private Company Governance since 2021 and work with families, boards, family offices, and advisory teams on governance, leadership, succession, and consequential decisions.

Cases can also draw on plays, films, and television dramas. I have explored family enterprise dynamics through *Succession* and *Slow Horses* in interviews with *Family Wealth Report* and served as the board and family enterprise discussant for a PDA program on Arthur Miller's *All My Sons*.

Discuss this program

Case discussions can be selected or adapted to the audience, meeting context, and learning objectives. To explore a session for an upcoming family meeting or retreat, please get in touch.

Paul Edelman, PhD, PCC | paul@edelmancoaching.com | 508-947-5300