Navigating Family Business Succession and Governance Training Course



02 - 06 Nov 2026

Lisbon

4500 € (Per Person)

Ref: #CS9394_184891

Course Introduction / Overview:

Family-owned enterprises are the backbone of the global economy, yet their unique blend of personal relationships and professional responsibilities presents significant challenges, particularly during generational transitions. This course provides a comprehensive roadmap for navigating the complexities of succession and governance to ensure long-term sustainability and harmony. Drawing on foundational principles from leading experts like John L. Ward, whose work in "Perpetuating the Family Business" has guided countless enterprises, this program delves into the critical pillars of successful family business management. Participants will explore proven strategies for establishing robust governance structures, developing effective succession plans, and managing the intricate dynamics of family relationships within a business context. At BIG BEN Training Center, we have designed this training to move beyond theoretical concepts, offering practical tools and actionable frameworks. This course is essential for any family business leader committed to preserving their legacy, fostering next-generation leadership, and building a resilient enterprise that can thrive for generations to come.

Target Audience / This training course is suitable for:

- Family Business Owners and Founders.
- Next-Generation Family Members and Potential Successors.
- Non-Family Executives and Senior Managers in Family Businesses.
- Members of the Board of Directors or Advisory Boards.
- Family Office Executives and Wealth Managers.
- Legal and Financial Advisors serving family enterprises.
- Human Resources Managers in family-owned companies.

Target Sectors and Industries:

- Manufacturing and Industrial Production.
- Retail and Consumer Goods.
- Real Estate and Construction.
- Agriculture and Agribusiness.
- Hospitality and Tourism.
- Professional Services (Legal, Accounting, Consulting).
- Technology and Innovation Hubs.
- Governmental bodies and agencies supporting small and medium-sized enterprises (SMEs).

Target Organizations Departments:

- Executive Management and Leadership.
- Strategic Planning and Business Development.
- Finance and Accounting.
- Human Resources and Talent Management.
- Legal and Compliance.
- Operations Management.
- Shareholder Relations.

Course Offerings:

By the end of this course, the participants will have able to:

- Develop a comprehensive and actionable succession plan for key leadership roles.
- Design and implement effective family governance structures like family councils and constitutions.
- Master communication strategies to prevent and resolve conflicts within the family and business.
- Integrate non-family executives effectively into the company's leadership and culture.
- Align family values with long-term business strategy and corporate vision.
- Establish clear policies for ownership transfer, compensation, and shareholder agreements.
- Prepare the next generation for leadership responsibilities through structured development programs.
- Implement best practices for board composition and director responsibilities in a family firm.
- Create a strategic framework for managing family wealth and legacy planning.

Course Methodology:

The training methodology at BIG BEN Training Center is designed to be highly interactive, practical, and engaging, ensuring that participants can immediately apply their learning to their unique business situations. We move beyond traditional lectures to create a dynamic learning environment built on a foundation of real-world application. The course heavily utilizes case studies of successful and challenged family businesses from various global industries, allowing participants to analyze complex scenarios and debate strategic solutions. Facilitated group discussions and peer-to-peer learning are central to the experience, providing a confidential space for attendees to share challenges and insights. Interactive workshops will guide participants through the process of drafting key governance documents, such as a family constitution outline or a succession roadmap. Role-playing exercises will be used to practice difficult conversations and conflict resolution techniques. Our expert facilitators provide continuous feedback and guide participants in creating personalized action plans, ensuring that the knowledge gained translates into tangible progress for their family enterprise.

Course Agenda (Course Units):

Unit One: Foundations of the Family Enterprise

- The unique dynamics and challenges of family businesses.
- Understanding the three-circle model of family, business, and ownership.
- The lifecycle of a family business from startup to generational transition.
- Identifying and articulating core family values and vision.
- The role of tradition versus the need for innovation.
- Common pitfalls in family business management and how to avoid them.
- Assessing the current state of your family business.

Unit Two: Building Robust Governance Structures

- The importance of a formal governance framework.
- Designing and implementing a family constitution or charter.
- Establishing a family council and defining its roles and responsibilities.
- Structuring an effective Board of Directors with independent members.
- Developing clear shareholder agreements and ownership policies.
- Creating policies for family member employment and compensation.
- Ensuring transparency and accountability across the business.

Unit Three: The Strategic Succession Planning Process

- Differentiating between management succession and ownership succession.
- Identifying and assessing potential next-generation leaders.
- Creating a comprehensive leadership development plan for successors.
- Defining a clear timeline and roadmap for the transition process.
- Managing the emotional and psychological aspects of letting go.
- Financial planning for retirement and estate transfer.
- Communicating the succession plan to all stakeholders.

Unit Four: Managing Communication, Conflict, and Relationships

- Effective communication strategies for family members.
- Techniques for constructive conflict resolution and mediation.
- Building trust and fostering collaboration across generations.
- Managing the integration of in-laws and extended family.
- Developing emotional intelligence for effective family leadership.
- Balancing the needs of the family with the needs of the business.
- Creating forums for open and honest dialogue.

Unit Five: Ensuring a Lasting Legacy and Long-Term Value

- Strategic planning for sustainable growth and diversification.
- Principles of intergenerational wealth management and preservation.
- The role of family philanthropy and social responsibility.
- Adapting the business to changing market conditions.
- Fostering a culture of entrepreneurship in the next generation.
- Planning for business continuity and crisis management.
- Final project: Developing a preliminary action plan for your family enterprise.

FAQ:

Qualifications required for registering to this course?

There are no requirements.

How long is each daily session, and what is the total number of training hours for the course?

This training course spans five days, with daily sessions ranging between 4 to 5 hours, including breaks and interactive activities, bringing the total duration to 20 - 25 training hours.

Something to think about:

How can a family business balance the preservation of its founding values with the critical need for innovation and adaptation to survive across multiple generations?

What unique qualities does this course offer compared to other courses?

This course distinguishes itself by adopting a holistic and deeply practical approach that addresses both the technical and the deeply human elements of family business continuity. While many programs focus narrowly on the legal and financial mechanics of succession, this training dedicates significant attention to the complex interplay of family dynamics, communication, and emotional intelligence, which are often the true determinants of success or failure. We move beyond generic models to help participants build bespoke governance and succession frameworks tailored to their unique family culture and business context. The curriculum is enriched with carefully selected case studies that illustrate real-world challenges and innovative solutions, providing actionable insights rather than just theoretical knowledge. Furthermore, the interactive methodology, emphasizing peer-to-peer discussion and conflict resolution role-playing, creates a unique environment of shared learning and problem-solving. Participants leave not just with a plan, but with the enhanced communication skills and strategic foresight needed to lead their family enterprise toward a prosperous and harmonious future.