Family Business Governance and Succession Planning Training Course



30 Nov - 04 Dec 2026

Rome

5800 € (Per Person)

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Course Introduction / Overview:

Navigating the intricate dynamics of a family-owned enterprise requires a unique blend of business acumen, legal knowledge, and interpersonal skill. This course provides a comprehensive roadmap for establishing robust governance structures and executing seamless succession plans, ensuring the longevity and prosperity of your family's legacy. Unlike generic business management programs, this training delves into the specific legal frameworks and governance models essential for mitigating conflict, protecting assets, and facilitating smooth generational transitions. We will explore the foundational principles discussed by leading academic authorities like John L. Ward in his seminal work, "Keeping the Family Business Healthy," focusing on practical application. Participants will learn to draft a family constitution, structure shareholder agreements, and manage the complex interplay between family, ownership, and management. BIG BEN Training Center has designed this curriculum to empower leaders with the tools to build a sustainable enterprise that thrives for generations, transforming potential family disputes into structured, productive dialogue and strategic planning. This journey is about securing not just the financial future of the business, but also the harmony and unity of the family behind it.

Target Audience / This training course is suitable for:

- Founders and owners of family businesses.
- Next-generation family members preparing for leadership roles.
- Non-family executives and senior managers in family-owned companies.
- Members of the board of directors or advisory boards.
- Legal counsels and corporate lawyers advising family enterprises.
- Wealth managers, accountants, and financial advisors.
- Family office executives and staff.
- Consultants specializing in family business advisory.

Target Sectors and Industries:

- Manufacturing and Industrial Production.
- Retail and Consumer Goods.
- Real Estate and Construction.
- Agriculture and Agribusiness.
- Hospitality, Tourism, and Food Services.
- Professional Services (Law, Accounting, Consulting).
- Technology and Innovation Hubs.
- Governmental and quasi-governmental bodies involved in SME development and regulation.

Target Organizations Departments:

- Executive Management and Leadership.
- Legal and Compliance Departments.
- Finance and Accounting.
- Human Resources.
- Strategic Planning and Business Development.
- Board of Directors and Governance Committees.
- Shareholder Relations.

Course Offerings:

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

- Develop a comprehensive family constitution and charter.
- Design and implement effective corporate governance structures for a family business.
- Master the legal frameworks governing ownership transfer and shareholder agreements.
- Create a strategic and legally sound succession plan for key leadership roles.
- Implement fair and transparent compensation policies for family and non-family employees.
- Utilize proven conflict resolution techniques to manage family disputes effectively.
- Structure estate plans to minimize tax liabilities and ensure asset protection.
- Evaluate the role and integration of non-family executives into the business.
- Establish clear communication protocols between family, management, and the board.
- Protect the family's legacy while fostering innovation and business growth.

Course Methodology:

The training methodology at BIG BEN Training Center is designed to be highly interactive, practical, and engaging, moving beyond theoretical lectures to focus on real-world application. This course utilizes a blended learning approach that includes expert-led presentations on core legal and governance principles, followed by intensive, hands-on workshops. Participants will analyze detailed case studies of successful and failed family business transitions, dissecting the critical decisions and legal structures that determined their outcomes. A significant portion of the training is dedicated to collaborative group exercises, where attendees will work in teams to draft key documents like a family constitution outline or a succession plan checklist. Role-playing scenarios will simulate challenging conversations, such as negotiating buy-sell agreements or addressing family conflicts, providing a safe environment to practice essential communication skills. Ample time is allocated for peer-to-peer discussion and Q&A sessions, allowing participants to share experiences and gain diverse perspectives. Our facilitators provide continuous feedback and guide participants in creating actionable plans they can implement immediately within their own enterprises, ensuring a tangible return on their investment in this training.

Course Agenda (Course Units):

Unit One: Foundations of Family Business Governance

- The unique dynamics of family-owned enterprises.
- Differentiating between family, ownership, and management systems.
- Establishing a family council and its functions.
- The role and composition of an effective board of directors.
- Developing a family mission, vision, and values statement.
- Crafting a comprehensive family constitution and charter.
- Principles of corporate governance tailored for family firms.

Unit Two: The Legal Architecture of Family Enterprises

- Choosing the right legal structure for the business.
- Drafting and implementing legally binding shareholder agreements.
- Understanding buy-sell agreements and their triggers.
- Employment law considerations for family members.
- Legal responsibilities and liabilities of directors and officers.
- Protecting intellectual property and other key business assets.
- Compliance with corporate and regulatory requirements.

Unit Three: Strategic Succession Planning

- Identifying and developing next-generation leaders.
- Creating a clear and transparent succession timeline.
- The founder's role in letting go and facilitating transition.
- Communicating the succession plan to stakeholders.
- Financial and operational readiness for transition.
- Training and mentoring programs for successors.
- Contingency planning for unexpected leadership changes.

Unit Four: Financial and Estate Planning for Continuity

- Strategies for wealth management and preservation across generations.
- Navigating inheritance laws and estate taxes.
- The use of trusts, gifts, and other estate planning tools.
- Valuation of the family business for transition purposes.
- Life insurance and its role in funding buy-sell agreements.
- Ensuring liquidity for the business and the family during succession.
- Strategies for equitable, but not necessarily equal, inheritance.

Unit Five: Managing Transitions and Conflict Resolution

- Anticipating and managing common sources of family conflict.
- Implementing formal conflict resolution mechanisms.
- The role of mediation and facilitation in family disputes.
- Integrating non-family executives into the leadership team.
- Balancing family traditions with the need for business innovation.
- Managing the emotional and psychological aspects of succession.
- Building a lasting legacy and philanthropic strategy.

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 need for innovation and adaptation driven by non-family executives?

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

This course distinguishes itself by offering a deeply integrated and holistic approach to the complex challenges of family business continuity. While many programs focus on either the "hard" legal and financial aspects or the "soft" interpersonal skills, this training weaves them together into a single, cohesive framework. We recognize that a legally perfect succession plan will fail if family dynamics are ignored, and that family harmony is unsustainable without clear, enforceable governance structures. The curriculum is built upon practical, actionable strategies rather than abstract theories. Participants will not just learn about a family constitution; they will engage in exercises to draft its core components. They will not just hear about conflict resolution; they will role-play difficult conversations. Furthermore, the course content is grounded in both established academic research, such as the models proposed by John L. Ward, and contemporary case studies reflecting today's global business environment. This ensures that the legal and strategic frameworks discussed are both timeless in principle and relevant in practice, empowering participants to build a resilient enterprise and a united family legacy.