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Walking that family and business tightrope; the relationship between Family Business Adviser and the Family Business

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Abstract: The initial paper in this series (Swaffin-Smith and O'Leary, 2019) focused on one company and examined the difficulties encountered in the transition from an owner-managed operation to that of a sibling partnership. Following a decade of support for that family business by the family business adviser author, this study uses various frameworks to explore several key learning points about the role of a family business adviser in interactions with family members in the organisation. These experiences have enhanced understandings of the complex nature of the interaction between the adviser and client, particularly how the relationship evolves and how frameworks can be adapted to achieve mutually agreed business and family outcomes. It also further reinforces the observed transitional and evolutionary nature of family firms as reflected in the Organic Model (O'Leary and Swaffin-Smith, 2016) of family businesses.

Keywords: Family; Business; Owner; Manager; Sibling; Partnership; Adviser; Frameworks.

Profiles:

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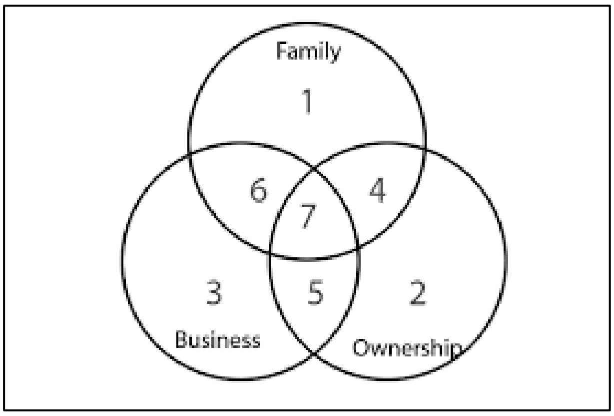
1. Introduction to family business advising as a relatively new profession

The profession of Family Business Adviser (FBA) emerged in the 1980s, with earlier research focused on Small & Medium-sized Enterprises (SME) and the owner-manager. Several American Universities formed Family Business Departments in the 1980s to povide business advisory services for owner-managers and SMEs, with limited attention paid to the impact that family dynamics could have on the development and sustainability of the business. In the UK, the Universities of Strathclyde and Lancaster, the London Business School and Imperial College London, were at the forefront of offering services to family businesses and their next generation of leaders.

In research on family business advisory services, several authors (for example Aronoff, 1998) suggest that understanding advising is key to working with family businesses and enhances the adviser's ability to balance family dynamics, decision making and firm performance. Strike's (2012) review of the literature on family business advising and consultancy indicated that much of the study is focused on its practical application rather than theoretical considerations, and that there is very little work on the efficacy of family business consultations or interventions.

2. The role of Family Business Advisers

Since the emergence of the profession, it has become clear that there are many categories of adviser and, as illustrated in Figure 1, these can be broadly broken down into three main category types: Formal Advisers, Informal Advisers and, in larger businesses, Family Business Boards.



1. Family.
2. Ownership.
3. Business.
4. Advisers: Private Banker; Estate Planner; Pensions; Financial; Tax Lawyer.
5. Advisers: Business Angel; Corporate Financier; Investment Company.
6. Advisers: Therapist; Business/Management Consultant; Psychologist; Individual Coach; Psychiatrist.
7. Family Business Adviser.

Figure 1: Advisory roles applied to the Three Circle Model of Family Business.
Based on Tagiuri and Davis (1996).

Formal advisers are employed by the family or the business, are often recruited internally or externally, come from a wide range of backgrounds and offer a wide range of services that can be related to all three areas identified within the Three Circle Model. The formal services provided are often transactional in nature (Grubman and Jaffe, 2010) and can take place over long perods of time, possibly generations. The provider of such expertise has also changed over time; the local Bank Manager in the UK in the 1960s was often a key source of advice to the small family business and would offer a mixture of formal and less-formal advice. Formal advice would often relate to the financial issues of the business and less-formal advice would be on family matters that impact the business. This was possible at the time as the Banks were more community-based than they are now and working relationships could be formed between known associates.

Informal advisers are drawn a range of people and are typically not formally hired by the family or the business, tending to build their relationships upon mutual trust (LaChapelle and Barnes, 1998). These advisers include spouses, other family members, family friends, business associates and suppliers. As noted by the FBA author: *"I once visited a small family business in Thailand where the daughter was managing the business on behalf of her family until her younger brother graduated and joined the business. The daughter had little support from her parents as they lived over 200 miles away and emphasised how much she relied on the advice given to her by two of the sales representatives from two of the business' key suppliers."*

One of the challenges in being a formal FBA is that, during the course of an intervention, the client and other members of the family may be receiving various forms of advice from other trusted sources, informal advisers who may not share the same goals, conceptual frameworks or experiences as the formal Adviser. The client who has hired the formal Adviser may find difficulty in balancing potentially conflicting advice and it may take a long time for the family to develop the same level of trust with such an external adviser.

Over time, as the family business grows, it is common for a Family Business Board to be formed. This often consists of a group of Board members that could be described as a combination of family members, senior employees, formal and informal advisers, each of whom is in a position to contribute to discussions about family business issues at both the Board meetings themselves and in the periods between meetings.

Theoretical models used by Advisers to underpin their approach to a family business client

There are several conceptual advisory models that categorise information, coordinate thoughts and propose means to resolve issues. There are three main disciplinary categories of models, each with a similar objective but achieving that through different approaches (Kadis and McClendon, 2006). For family business advisers, the underlying thread is that the unique overlap of family and businesses generates a need for a unique approach to problem-solving (Hilburt-Davis and Dyer, 2002). The three main categories may be described as those based on family system theory, those on organisational development systems theory and those on family therapy theory. Combinations of these also exist.

Those models in the first category are broadly based on Bowen's long-established psychological theory of human behaviour (Gilbert, 2018). It views the family as an emotional unit with complex interactions of thoughts, feelings and actions, where family member are emotionally independent but often solicit each other's attention, approval and support, and react to each others' needs, expectations and troubles (Kerr and Bowen, 1989). An adviser can apply this theory to help the family recognise and understand behaviour patterns that affect the business, to suggest necessary changes and to progressively professionalise the business, as noted by Bork (1993) and Baker and Wiseman (1998). A key premise of this model is that the key client is ultimately the family rather than the family business and, therefore, the Adviser's primary goal may not be to help create a wholly sustainable business but to hep ensure that family members are relatively satisfied with how they relate to one another and to the business.

The second group of advisers may be categorised as Organisational Development specialists who focus on seeing the family as being in control of the business and being involved in the process of change. Particular attention is paid to how family members communicate with each other and with other stakeholders, how they make decisions and how they measure performance. Organisational development approaches use process models to highlight the difference between content and process, while stressing the importance of both. There is generally an emphasis on a top-down approach which seeks to encourage the development of values that facilitate empowerment, more open communication, a blame-free culture and a relatively high level of trust between everyone in the business. Advisers can use process models to help managers appreciate the emotional implications of change and to understand the connections between personal family and business interests.

The third category of advisers base their approach on systems theory, analysing the conflicts that arise as a result of the interactions between the various systems. This theory emphasises the need to focus on the issue in the relevant part of the Three Circle model (family, business and ownership) while, at the same time, taking into account the dynamics of the overlapping areas and even the system as a whole (Gersick, Davis, Hampton and Lansberg, 1997). An adviser using this framework, to help a client develop a succession plan for example, could facilitate a discussion on the impact on, and potential consequences of, particular options upon each element of the system.

FBAs tend to use combinations of these three different conceptual models and their approach is typically influenced by the context in which they are advising. The complexity of the relationships between family and business, the perceived and actual needs of the client, where the family and business are in terms of development, and the approach which is initially most acceptable to the client, are all issues that need to be considered and these judgements are often based on the adviser's experiences in prior consultancy interventions. The FBA author of this work has had specific training in the family business field and has worked with over twenty five different family businesses, both nationally and internationally, noting that: *"My overall approach is to act as a facilitator, one based on helping the client work towards a solution to the issues and problems that they have identified. In this way, the client is steered towards specific expert advice in certain areas but I encourage the family and the business to engage in processes that transcend all three of those conceptual models; approaches based on psychology, organisational development and systems theory."*

3. The case

3.1 Background

The FBA worked for this company on three separate assignments over a decade, after originally being contacted by telephone for help by the founding parents' younger son, the FBA having been recommended by another adviser. The son had recently been appointed by his father to be the Managing Director (MD) of this relatively small, but highly successful, Language School. The son was relatively open in this initial conversation, indicating that he was finding it extremely difficult to cope with the other family members who were also working in the business. The new MD had worked in the business for eight years, having joined after University graduation. However, he was feeling totally undermined as he could not make a decision without his father challenging it or even changing it. The son was keen to develop the business as he felt that this was essential for it to have a sustainable future. He had also recently attended a 'Developing the next generation family business' programme organised by one of the Private Banks and wanted to introduce some of the ideas that he had gleaned from it. He felt his situation within the business had become more difficult because his parents had also appointed both of his older brothers as Directors of the business, each of whom had run Language Schools overseas with varying degrees of success. Both brothers felt that they had relevant experience but the younger brother felt that they were using this to undermine him. In the younger son's view, they were failing to respect his role as MD. The Father and Mother were also still very much involved in the business, as both Directors and on a daily basis, with all of them sharing the same large office.

3.2 Three phase approach

Phase I: Family Development

After further discussion with the son, and after he had had time to hold initial discussions with his father, the following principles were agreed:

1. The family as a unit must be the client, the focus being on helping the family identify what they, as a family and as individuals, wanted out of the business both now and in the future. Where conflicts arose, they would work together on them, particularly if the issue could impact their relationships. The new MD accepted that, at this stage, he as an individual was not the client.
2. The next stage would be a visit by the FBA to the business to meet the principal shareholders, the siblings' parents, to establish their commitment and support for the interventions of the FBA and to explore their perceptions of the situation. Following this meeting, the FBA also met with the two older brothers for similar discussions. Each of these

initial meetings proved to be difficult as the conflicts appeared to be very deep-seated. Nevertheless, at the end of this visit, the FBA agreed to produce a proposal for supporting the family to help them clarify what they wanted from the business even though, at this point, the FBA felt that it unlikely that the family as a whole would fully commit to working with an external FBA for several reasons: The father was very autocratic and appeared unready to relinquish authority to his son, the MD; the two older brothers were very jealous and diresepectful of their younger briother, the MD; while the parents seemed unwilling to differentiate between family and business roles and wanted to treat all three brothers equally. It was also evident that the father has sought help from several other advisers, both internally and externally, on business improvements generally but had not heeded their advice.

3. The FBA's proposal suggested holding a family meeting to review what everybody wanted from the business, how they felt about working together and what they could each do to improve relationships with each other. The proposal clearly defined what each member of the family had to commit to before, and during, the intervention for it to be a success. As the FBA is not a psychiatrist or family therapist, the proposal focused on family behaviour within the context of the business.
4. Following receipt of the FBA's proposal, the father held private discussions with the rest of the family as he felt that the benefits of such a family meeting would be limited. It was clear to the FBA that the family, as a whole, was not commited to the proposal. The new MD was committed to it as it was consistent with what had been learnt from his recent Developing the Next Generation programme. However, the final outcome was that the FBA and the new MD decided not to proceed further with the intervention at this time.

The FBAs' reflections on this are that there were several reasons for this outcome at this stage. First, the father considered himself to be effectively a monarch who would not stand down willingly. He also believed that he had never made a mistake in running the business for so many years. In addition, other family members tried to draw the FBA into their disputes trying to form various coalitions against each other, and thereby placing the FBA at risk of a lack of objectivity and a reluctance to provide candid opinions (Barach, 1984; Haynes and Usdin, 1997).

Phase II: Organisation Development

The FBA kept in touch, informally and intermittently, with the MD for a further four years, not as a formal adviser but more as a listener and sounding board for him as an individual. However, this contact gradually tailed off until, almost ten years after the first intervention, the FBA was contacted by the younger son, who enquired if he was still a FBA. He indicated to the FBA that he was feeling very stressed with the situation in the family business for a number of reasons. His father had by this time retired due to ill health while his mother, still a major shareholder, was also not that well. He was still trying to run the business with his two brothers but major disagreements that they continued to have were having a detrimental impact on the business and the morale of staff. He felt he still did not have the full support of his mother in his role as MD. He wanted the FBA's help to professionalise the business in some way.

The FBA agreed to help, particularly as this could be the last chance to stabilise the situation, but also set some conditions for such support:

a. The primary client would be the business and the primary focus would be on identifying and developing structures and processes that improved the performance of the business. This included developing a realistic business strategy, defining values to clarify the roles and responsibilities of the Board and all members of the management team, as well as promoting empowerment and developing trust between Directors and staff.
b. The FBA would interview all Directors and key members of staff to produce a preliminary report based on a SWOT (Strengths; Weaknesses; Opprtunities; and Threats) analysis.
c. The active Directors (the three sons and their mother) would agree to attend a Directors' meeting where this report would be discussed and a series of actions would be agreed and, prior to this meeting, the same group would develop and agree a code of conduct which was to influence the way in which they related to one another during that meeting.

d. The MD would then ensure that all Directors were fully in agreement with the approach.

As a facilitator, the FBA's focus shifted towards the issue of organisational development. The business itself was now considered to be the client and the main goal was to improve its performance. This approach also proved difficult as the two older brothers appeared to play only lip-service to it and their mother still found it difficult to recognise that she could not relate to all of her sons equally when it came to business matters. The report was completed by the FBA but the two older sons refused to take part in a Board Meeting to discuss it. However, there were two positive outcomes from this intervention; one of the brothers deciding to retire and the mother agreed that she could no longer cope with trying to resolve conflicts between the siblings. This ultimately led to third phase in this longitudinal consultancy intervention.

Phase III: Individual Mentoring

The MD now asked the FBA to act as his mentor as he planned to achieve the proposed business restructure that would help create a sustainable business. The family dynamics in the business had changed and the MD was feeling more confident generally, in part because he had now developed a good personal working relationship with the company's external stakeholders, especially the Bank. The FBA agreed to work with the MD on the following conditions:

i. The FBA would regard the MD as the client and the objective of the intervention was to help him develop and implement a plan for restructuring the business, using an approach that would ensure that he was able to satisfy both his personal and business needs.
ii. That others in the business did not know that the FBA was acting as the MD's mentor.
iii. The project would be relatively short-term and be concluded when the FBA and client agreed that the outcome had been achieved.

In this final phase, the facilitator used a systems-based framework to help the client plan and implement the restructuring of the business, in part by encouraging the MD to consider the links between the aspirations and needs of the actors in each segment of the system and to identify the actions that could ensure achieving the best balance of progress. This the MD achieved this by building upon the coalitions that he had formed with the external stakeholders, in being more assertive by utilising the enhanced powers that he gained as a result as a result of the changes in family dynamics and, finally, by gaining the respect of the staff in doing so.

The business is now making a recovery and is business-focused rather than family-focused.

4. The Analysis

This analysis focuses on what has happened within the family and the business during this whole process, one in which the relationships within the family deteriorated to the point where the very sustainability of the family business was threatened but, ultimately, overcome.

4.1 The initial owner-manager period

The FBA author had previously met the father when he was actively managing the business. Then, the mother and younger son were the only members of the family working in the business. However, the son was feeling very frustrated as he felt he had very little influence on the business as his father appeared to be very dogmatic and autocratic, with no particular long-term plans for either the business or retirement. At the same time, the parents were expecting to be financially supported by the business, through dividends, until they died. However, the only management successor considered was the youngest son so, when the father became ill, the decision was made to transfer management responsibility to this son and to give him a 25% stake in the business, without reference to the other siblings. At about the same time, both the other two sons were not working and returned to the UK, asking to join the business as they both had some experience in the language school business. The parents, without reference to the youngest son, made them Directors of the business and also made their daughter a Non-Executive Director. It seems that the younger son had little or no mentoring support from his father and the older children appear to have resented their younger brother being given this role, especially as they had each run their own language school, though not necessarily successfully. This created a potentially difficult situation and it had clearly become even worse.

4.2 The current status of the family business

The business is still family-owned and run and the family does not own any other businesses. In terms of the four family business types identified by O'Leary and Swaffin Smith (2016), it is still primarily a Livelihoods Family Business. The business was started by the original owners to provide an income for the family and, over the first three decades or so, the owners tended to plough profits back into the business rather than build-up their own personal wealth. One of their main concerns had been to ensure that all members of the family could work in the business if they wished to do so, regardless of the potential impact on costs or efficiency. Consequently, the two older sons came back to the business after relatively unsuccessful careers elsewhere. On balance, the parents appear to have placed relatively more emphasis on family issues rather than business goals and values. Even so, the sons would like the business to be passed down to future generations and, therefore, appear to be expressing aspirations for it to become a Heritage Family Business in the long-term. To achieve this though, they would need to make significant changes to the way the business is managed and to regularise the relations between the family members and the business. However, despite such desires, they could not agree upon a clear family-agreed vision or strategy for the business.

Other family business models, such as Landsberg (1999) on owner-manager, family and sibling-partnerships, confirm these findings as the children and the mother in this case are the active Directors and the business is therefore a family-partnership, having ceased to be an owner-manager business when the father retired. However, the business is struggling to become a sibling-partnership because of the distrust among the siblings. This model identifies a number of issues and challenges that the owner-manager has to deal with to ensure a relatively smooth transition from owner-manager to family-partnership. These include sharing the vision for the business with the family; staying connected with the family; developing a plan for the business; and exploring financial options. Once the business is establishing itself as a family-partnership, other challenges and issues emerge, including sharing control with the children, mentoring the new MD, creating liquidity for the founder, holding family meetings, setting up a Board Structure, agreeing the family vision, transferring ownership and choosing a successor.

In family businesses, the family need to be clear on the distinctions between transfer-of-ownership and transfer-of-management; a complex set of of decisions and actions need to be initiated by the older generation and discussed and agreed with other members of the family. In this case, the parents had not properly assessed whether their children were able to collaborate as a team.

4.3 Current challenges

These initial transitional phases have had a major impact on the businesses' ability to develop. The disruption has continued because the youngest son has not had the full support from his mother even though, as principal owners of the business, they could exercise some control over the behaviour of other Directors. However, the mother finds it hard to make such decisions because it makes her feel that she is not treating her children equally. Her main concern is to be part of a happy and integrated family and she intends to leave her 75% of the shares to her other three children so that each sibling has 25% of the business. She also feels guilty that her and her husband have not built up a substantial amount of private wealth and suffers stress in allowing all of her children to discuss the business individually with her. Alongside this, the youngest son does not feel that his contribution within the business is valued and he feels that he lacks the support from the previous generation in helping him and the family move the business forwards. He would still like to develop an effective sibling-partnership that leads towards Heritage status through professionalising the business.

5. Summary and Discussion

Many of the lessons to be learnt from analysing this case are relevant to relationships between any business adviser and client. However, the FBA role is potentially more complex because of the existence of these three overlapping systems; the family, the business and its ownership. The overlap between each of the systems can lead to conflicts between those players who occupy different segments of the system, while there are also potential sources of conflict within each of the elements of the system, such as the family or the business.

Some specific lessons that can be learnt from this intervention are that:

A. It is very difficult to change family dynamics within a family business unless the senior members of the family see the need to change, particularly if the business is perceived to be successful and has never had any serious issues to overcome.
B. A FBA approach that focuses on helping the family unit clarify what each person wants from the business, and focuses primarily on the relationship between family members within the business, will have limited impact if the conflicts within the family are deeply embedded. Family meetings, for example, may simply make the situation more difficult. Therefore, choosing the right type of adviser is crucial and that requires a good understanding of the needs of the family (Matieu, Strassler and Pearl, 2010).
C. Advisers need to identify who their client is as this will influence the goals of any intervention and the conceptual approach that is most likely to bring about relevant change. In this case, the FBA author and the company used three different approaches. The FBA also changed his perception of who the primary client was from the family to the business to the MD, while also suggesting that the client seek independent expert advice where appropriate.
D. The FBA author's experience suggests that many family businesses do not know how to manage advisers or the consultancy process. Therefore, the adviser has the responsibility to help the client understand that process before the consultancy assignment begins. This includes clarifying how the success of the intervention will be judged, identifying the different options for support, the potential advantages and disadvantages of each option and the factors that are likely to have a notable impact. Working through these issues helps to build trust, a key element when privacy is essential, as it often is in family firms (Lester and Cannella, 2006).
E. It is essential to clarify the responsibilities of the adviser and the circumstances under which they can withdraw from the project In this case, the FBA author was clear that, if he felt that the family were not fully committed to what had been agreed within the contract, he could withdraw.

Assessing the success of family business interventions generally has been little researched according to Strike (2012) and considered very differently by researchers in the field. According to Kaye (1996), the quality of family relationships is the main measure of adviser success. However, Poza, Hanlon and Kishida (2004) are more interested in family businesses that enhance the overall lives of family members. Jaffe and Lane (2004) focus on outcomes that indicate conflict resolution as this enhances relationships and increases trust among family members. Astrachan and McMillan (2006) note that there are no commonly held views on gauging the success of a consultation.

Certainly, few studies have explored the long-term efficacy of family firm consultations. From the FBA author's experience of working with this company, the criteria that can be used to measure the success of the intervention depend upon what the client is trying to achieve. During the three phases of this intervention, the client focus changed from the family to the business to an individual, each with different priorities. When it became apparent that family relationships were not improving, the focus shifted to one of ensuring that the business would survive, still with the objective of trying to protect the family in terms of employment and income. Finally, with a change in the family situation, the younger son, as MD, focused on ensuring that the business became sustainable. This ultimately led to one older brother leaving the business, which enhanced the MD's ability to introduce change effectively.

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