

THIRTEEN



personal trainer

Have you ever tried hiring a personal trainer? Whether or not you have, ask yourself why you might hire one. Let me guess a few of your answers.

- ◆ “I’ve tried New Year’s resolutions before. They last at most a month.”
- ◆ “I’ve tried working out with a buddy. That worked for a while. But then . . .”
- ◆ “The trainer provides accountability.”
- ◆ “Since I pay for a personal trainer, I want to get my money’s worth.”
- ◆ “Paying the fee is a bit of skin in the game. It makes it more likely that I’ll get my behind out of bed and show up at the gym and do my workout.”
- ◆ “The trainer has been through this before. I trust she knows what she’s doing.”

How’d I do?

When people ask me to describe what we do in Family Business Counsel, I often describe our work in terms of a personal trainer. For reasons similar to those listed above, I know it's far more likely you will balance the family business teeter totter with the help of a "personal trainer."

But It's Hard!

I know it's hard for leaders to ask for help. Most of the time, it takes a crisis, much like what it takes for many people to finally go to counseling.

"I don't need to see a shrink," they will say. "Shrinks are for people with real problems."

Is that how you view it? I certainly used to, until I really had no choice. When my dad died, I felt as though I was carrying the load for my whole family—not only for my nuclear family, but for my brother and sister as well. I needed help sorting through things. But I didn't reach out to get that help until I felt I had reached the end of my rope. And the counseling helped! I now see it as a courageous move when people who need help seek out a counselor.

But who counsels business owners? I don't mean a consultant, but a counselor, a confidant, someone who can act as a sounding board for the business owner. While a CPA or an attorney could play the role, most don't feel comfortable talking about the "touchy/feely stuff." And how do they get paid? By the hour, on the clock. But we'll never get to the issues we absolutely have to address if the client is worried about the meter running.

Well then, how about financial professionals? How might they serve as counselors? While I know that some practice "life planning," in my experience, most financial advisors tend to say, "I'm not trained in psychology, so I can't go there."

Conversely, most psychologists aren't trained in business matters. Neither are clergy.

So where does that leave the business owner who admits he or she needs help but has nowhere to turn? That's the gap we've tried to step into. And I'm an evangelist when it comes to this approach! Every business, family, team, and organization needs facilitation. We all need facilitators in one area or another. That's why I like what the poet Rumi said: "Close both eyes to see with the other eye." For family businesses, we're often that other eye.

Before the Crisis Hits

I recently attended a gathering of advisors who work with family enterprises. An interviewer asked the CEO of a local family business how advisors could render better assistance to family firms like his. He didn't hesitate. "Get to them through some sort of forum before crisis hits," he said.

We've tried to do this by facilitating forums where family members and key employees of family businesses come together. We typically divide them into the "older" group and the "younger" group and then pose questions to each group for discussion:

- ◆ What do you wish the "other guys" knew about you?
- ◆ What bothers you about the "other guys"?

Finally, we bring both groups together and watch what happens. It's always lively! The participants always gain several important takeaways:

- ◆ We aren't the only ones facing these issues.
- ◆ Maybe we can talk about this stuff.
- ◆ Maybe we need some help facilitating these challenging conversations.

While it's better to have the necessary conversations before a crisis hits, sometimes you have no choice but to have them after an explosion. A few key questions can help set the stage for changing the tone of the conversation, particularly if you have already moved into crisis mode.

Prior to an initial meeting with two business owners who had fallen into crisis mode, I asked both clients to think about a couple of things:

- ◆ How did we get here?
- ◆ What are the core issues?

I wanted to use these two questions to get our new clients to agree on a few ground rules for moving forward. For us to make progress, they had to find something they could agree on. They needed something solid to build on, a belief that they could, one day, create a new, healthy culture of communication. It really can happen, even after a crisis hits.

Sometimes, in order to go from crisis to a healthier culture, one specific ground rule must be imposed temporarily. The parties in conflict can communicate with each other only in the presence of the facilitator. In some cases, so much relational damage has been done that the crisis stage has a “nothing-good-comes-from-that” atmosphere. It may take a while, but with hard work and a rebuilding of trust, the parties can get to the point where at least they can say, “Good morning,” and not read anything disparaging into the greeting. Over time, they can see that not every interaction has to lead to an explosion. Bit by bit, they can move out of crisis mode and into “recovery,” which eventually can lead to a healthier culture.

But remember, most change like this happens slowly. Be patient.

Not long ago, I met with a father and two sons, all of them engaged with a family business in at least its third generation, if not its fourth. The family had weathered some storms and was in the midst of another when they asked to meet with me. Because of the conflict, one brother had already left, twice.

Since it was a fairly athletic family, I thought we could draw on a sports analogy. I asked if they remembered playing pickup basketball games, where a bunch of guys get together to play an informal game. When you play these pickup games, you don't have referees. As a result, you try to follow an honor system and call your own fouls.

I asked these guys how that usually worked out. Often, they said, not so well. I agreed. I remember a lot of arguments. Sometimes the one who brought the game ball took his ball and went home. Other times shouting matches erupted. Sometimes the game just ended. Sometimes it ended in a fight.

Not so unlike family businesses, is it? Games usually go better with referees.

"I'm the referee," I told them.

We all laughed. They got the message, loud and clear.

Change the Conversation, Change the Business

Not long ago I had a phone conversation with a friend who owns a small business. He asked me to clarify the difference between viewing his business as a tool for generating income (paycheck) and viewing it as an asset. I explained that a paycheck is something I collect on a regular basis; it's mine. An asset, on the other hand, is something I steward or take care of. It's bigger than just me.

As we spoke, I sensed the lightbulb go on. "I'd never looked at

that way,” he said. And thus began a process of discovery for my friend. He wanted to explore how he could pass on to someone else, potentially a next-gen owner, something that had value.

What else can happen when a business owner allows an “outsider” to facilitate?

One client said to me, “Mark, there are things that wouldn’t get said without you in the room.” I noted three implications of his statement:

1. It’s good to “get stuff on the table.” The power of dark secrets gets broken when light shines in a dark place.
2. We don’t always want to hear what needs to be spoken. And when we hear it, we need two things: time to process what we’ve heard, and a setting in which to process the relational part of the insight.
3. You can construct a “safe house” in which these helpful conversations can take place.

Why do I choose to do what I do? I believe that my best comes out when conversations get stuck. People call each other ugly names and threaten to walk out of meetings. Somehow, the conversation keeps going and the individuals keep coming to the meetings. I do this work because I believe that countless conversations should be happening that are not happening—and that needs to change. Whether it’s a family, an organization, a business, or some other team, if we are to envision a hopeful, thriving future and then see that future unfold, these conversations must take place. And for that to happen, the culture of communication within these teams needs to morph.

Rarely have I seen these conversations take place on their own. Someone outside must come inside. Space must be cracked open. When this occurs, people find the room that enables them to speak

and hear differently, and so the conversation changes. If we can change the conversation, we can change the ethos of the team and thereby help the team succeed.

When any family, organization or other team commits to this path, they often discover it includes at least three positive outcomes:

- ◆ A growing level of honesty
- ◆ A belief that moving forward can bring real hope
- ◆ An attempt to seek win/win outcomes

Have you heard of DKDK? *We don't know what we don't know.* This statement is true for all of us. None of us knows what we don't know. At Family Business Counsel, we sometimes think of ourselves as librarians. Every client story is a reference volume we can pull off the shelf to help every other client. What we learned in that situation over there, we can use to help you in your situation over here.

As we help facilitate these crucial conversations, we've noticed something taking place often. Invariably, if the current owners are in their midfifties or older, we hear them say, "We should have started these conversations five or ten years ago."

The truth is, once you crack open the door, many benefits of facilitation open up. And this can happen in families as well as in businesses.

One Christmas, everyone in our family got to pick a day when every person in our clan would do whatever the "person of the day" chose. I wanted to spend my day watching Eddie Murphy movies, so we took in flicks such as *Beverly Hills Cop*, *Coming to America*, *Trading Places*, and *The Nutty Professor*. By the end of the day, I'd had my fill of Eddie Murphy. I won't tell you how my family interpreted the day. Let's just say they were good sports and "let Dad have his day."

My wife, on the other hand, teed up a day that forever changed

our family. She wanted each of us to take the Myers-Briggs personality inventory, the venerable personal assessment tool. We engaged a facilitator, each of us did the assessment individually, and then we spent time as a family talking through our profiles with the help of this facilitator. What an incredible day!

We discovered, for example, that words as basic as *honesty* can mean different things to different people. To my son, honesty means truthfully answering Mom's questions. To my wife, honesty means full disclosure. So, hypothetically, when Lyn asks Drew what he did last night, and Drew says he hung out with friends—and later Lyn finds out he also snuck into a gym with his friends to play basketball, without permission, and left some lights on—she says, “He lied. He wasn't honest. Therefore, I can't trust him.”

I think you can begin to see the value of the time we spent as a family on Myers-Briggs! The space the facilitator opened up felt incredibly enlightening to all of us.

About a year later, we engaged a facilitator to do the same thing with our company. The facilitator made an interesting observation. She described our company as “introverted,” which has implications for how we tell our story and how we market ourselves. Because we are an introverted company, *we* know what we do . . . but no one else does. That's not a great marketing strategy!

As a result of this insight, we engaged a marketing firm for twelve months and, through its facilitation, found a better way to tell our story. We renamed the company. Designed a new logo. Launched a new website. Clarified our vision.

Why did all of this happen? It happened because we allowed “outsiders” to facilitate some crucial work in our company. These days, we actively encourage all our family business clients to consider this kind of facilitation.

How Does It Work?

A potential client once asked me, “So Mark, are you going to show us the blueprint for this?” I told him that if he was going to engage our services, he was going to have to strike *blueprint* from his vocabulary.

The work of facilitation is more like going on a walkabout than a day hike. For a day hike, you hire a guide who gives you a map, pointing out where you’ll take pictures, where you’ll eat lunch, and how far you’ll hike, along with what time you can expect to be back at your car. The aboriginal guide who takes you on your walkabout says, “I know we’ll eat, but I can’t tell you when or where. I know we’ll sleep under the stars, but I’m not sure where. We’ll be back, but I don’t know when. You’ll experience things you’ve never experienced. Trust me! I’ve been on this walk many times.”

It takes courage to go on a walkabout rather than a day hike—but the benefits of the former can far outweigh those of the latter. I think that’s why one consultant calls what we do “Braveheart Consulting.” He understands that it takes courage to change.

Using “The Orange”

I once heard professional mediator Raphael Lapin share a story called “The Orange” that has helped many groups to move forward. We often use it in our own work. Lapin describes how Johnny and Susie, brother and sister, are fighting over an orange. They both desperately want the orange.

Now, Dad could swoop in with the Solomon approach and offer to cut the orange in two. That way, at least, both Johnny and Susie would get something, although only 50 percent of what they want. Instead, Dad takes Johnny aside and asks why he’s so

interested in the orange. Johnny replies that he has been outside running around all day and that a big, juicy orange would go a long way toward quenching his thirst. Dad then goes to Susie and asks about her interest in the orange. Susie replies that Mom has shared a cake recipe with her and that the frosting calls for the zest of the orange peel.

Dad quickly realizes that both Johnny and Susie can get 100 percent of what *really* interests them, not just what they think they want. Johnny can get the juice; Susie can get the peel. This happens only because he digs below their wants to discover their true individual interests.¹ Peeling back the layers can get to core issues. And it can bring about some honest sharing.

I often ask another question to peel back another layer in the midst of conflict: “What do you think should happen here?” Initially, one party will often describe his side and his preferred outcome. A facilitator can clearly see that this isn’t “fair.” At that point, the facilitator can state, “So what you’re telling me is you want more than your fair share. Am I hearing you correctly?” This statement holds a mirror in front of the person so he can see himself clearly, but without the “enemy” trapping him. This allows for honest confession that usually prompts a change in posture and opens a new way forward.

One attorney describes our work as being “The Business Whisperer.” I like that.

I recently stumbled on another tool that can open the door to using “The Orange.” Two owners of a professional services firm had reached a seemingly insurmountable obstacle in their path to an amenable future, which included eventual exits for both of them. They each told me privately that the other’s proposal was unacceptable, and so I felt anxious about our upcoming meeting.

When we got together, with more than a little fear and

trepidation, I drew a circle on the back of our agenda. “Assume this represents all there is,” I said. “Now, what do you want, Mr. Jones? And what do you want, Mr. Smith? If we add up those two and the sum is more than the circle, something’s got to give.” I call this “the math of circles and addition.” In their case, the impasse I had assumed was there didn’t really exist. About two minutes after I drew the circle, they were able to reach a mutually agreeable solution.

The simple act of drawing a circle got us all to look at things a little differently. If it hadn’t, perhaps the math of circles and addition would have led us to “The Orange.”

Finding a Facilitator

When a facilitator functions at a high level, the team gets not only a listening ear, but also a seeing eye. Let me give a word of caution here, however. I’ve often watched “the old guy” speak for the younger generation—usually incorrectly. It’s easy for a facilitator to think, “They shouldn’t do that.” But thinking a thought differs from acting on that thought.

The fact is, as a facilitator I can assume way too much and end up speaking for someone else. It is of utmost importance to let people describe their own experience and their own feelings. Don’t do it for them! Even if my assumptions turned out to be right, allowing individuals to articulate their own position and their own feelings is important. As a facilitator, I dare not rob them of the growth and life that comes from being able to tell their own story in their own words.

I’ve had to hone my fishing skills as I’ve worked with family businesses. A good fisherman knows when to let a fish run and when to reel it in. A good facilitator knows how to do the same

with client conversations. Sometimes they need to run and sometimes they need to be reeled in.

Sometimes in those conversations we need to face the music. There is bad news “out there.” But the bad news isn’t the end of the story. Most of us will never face what Viktor Frankl had to face in a Nazi concentration camp. In his seminal work *Man’s Search for Meaning*, Frankl stated, “Everything can be taken from a man but one thing: the last of the human freedoms—to choose one’s attitude in any given set of circumstances, to choose one’s own way.”² I hope you will cling to that “one thing” that remains whenever you face bad news. May you choose to find hope and a way forward—perhaps with a facilitator—to persevere and press on.

What about the Cost?

I recently spoke on a panel with a retired family business owner who had worked through his transition plan for his family’s business. It intrigued me to hear him describe why and how they decided to hire a facilitator. He described his efforts on his own to convene and facilitate crucial conversations with the family business. “I got to the point where I realized I needed to be a participant in these conversations,” he said. “I couldn’t be a facilitator.”

He said his family had budgeted \$180,000 over two years to hire their family business “personal trainer.” Was it worth it? “It was the best money we ever spent,” he declared.

My wife attended that forum, and during the Q&A, she raised her hand and asked to speak (which frankly made me nervous). She said that when she first heard me describe my fees—not as high as what the retiree on our panel paid, by the way—she insisted she would never pay that kind of money. But when I talked about

farmers not blinking to spend a quarter million dollars or more on a piece of equipment or regularly hiring people for \$30,000 or more per year, it began to make sense to her.

You can think about the cost from the opposite direction too. That is, how much will it cost you in the long run to *not* get the help you need? For a moment, let me pick on dentists. Dentists know that many patients wait too long to get their toothaches taken care of, which results in more pain, excruciating root canals, and far more expense. What does it cost to put off getting the required treatment? A lot! Both dentists and their patients get that. But how often do dentists fail to follow their own recommendations when it comes to creating the office culture they want for themselves, their staff, and their patients? What does it cost them to put off getting the help they need to create their desired office culture? It might be huge!

Facilitation isn't cheap, and you get what you pay for. In choosing a facilitator, it's all about the fit. From my point of view, facilitation will only work if your whole team buys in to the facilitator and the process he or she lays out. Lack of buy-in will quickly derail everything.

How Long Does It Take?

Sometimes people ask me, "How do we know when we're done?" Facilitation is like using training wheels when you're learning to ride a bike. You generally know when you no longer need the training wheels. You stop using them when you know you can ride on your own.

As a facilitator, I serve as the training wheels for a family business. I shouldn't do for you what you can do for yourself. But I also know it takes time to build those muscles, to learn to get ahead of crucial conversations heading your way. A good facilitator is a

guide more than an expert who tells you everything to do. This is *your* work. I can give you helpful tools, but they'll do you no good if they stay in the tool shed. You must implement the implements.

So when people ask how long the facilitation process takes, I often reply, without trying to be a smart aleck, "Longer than you think." We always discover new issues during the process. People change. It's one of the reasons we won't do hourly billing. As I've said, if the client worries about the meter running, we'll never get to the issues we truly need to address.

Time to Walk the Path?

I know these aren't easy areas for family businesses to wade into.

"What will others think? That we're screwed up?"

"Does nobody else deal with this?"

"This isn't rocket science. Surely we can handle this on our own."

"They (the kids) will just have to deal with it."

"We don't talk about family with 'outsiders.'"

I have just one question for you: How's that working out for you?

Not long ago, I signed up to do something that made me cringe. I arranged to have a booth in the exhibition center at an industry association conference. While I saw a few smiling faces, mostly I just sat there for fear that people would see me as a beggar. I tended to think of it like this: "Here I am, with my cardboard sign, asking for handouts."

When one friendly face came by, we started talking about how much I detested having a booth. All of a sudden, he told me of an idea he had for our company slogan:

"Is your family as f*%#ed up as ours? Go see Mark!"

I have to find a way to put that on my business card!

Will it take a crisis to get you to ask for help? It's okay to ask for help. It really is. And, what's the alternative? If you don't ask for help, and your son or daughter feels afraid to tell you that he or she doesn't want to join the family business, what happens? Either they suck it up and do something they're not cut out to do, or, they "elope"—they run off and don't tell you. Pick which one you want.

I'm guessing it's neither.

Now let me paint a different picture for you.

Suppose you swallow your pride and face your fears. I've had to do both innumerable times in my relationship with my business partner, "the founder."

So you decide it's okay to ask for help.

You let an outsider in.

You start to talk about "what we can't talk about."

When difficult issues arise, you know you have a regular time and place to talk about them in a safe environment.

You create a culture of communication in your family business.

You find out you aren't alone, that other family businesses deal with similar issues.

You break the power of the secret.

Sure, you have a few setbacks along the way. You have to let go of preferred, predetermined outcomes.

You begin to have confidence that even if things don't always go according to plan, they can continue to move forward.

You become convinced that if conversation continues, you'll make progress.

You begin to believe that the business can not only survive without you, but thrive.

You begin to see a sort of emeritus role emerge for you. Once

you communicate that you don't want to be in the way, the younger generation begins to see you as a sage; they ask for your opinion and seek your counsel.

You see that you can be away for increasingly longer periods of time . . . and they survive without you.

You begin to believe that the company can go to new heights once you are gone.

So let me ask a question: What would a scenario like that be worth to you, to your family, and to your business?

Are you ready to commit to walk this path?