

# Family Enterprises Suite of Executive Education Programs

John L. Ward Center for Family Enterprises

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*Information Session*

*November 18, 2020*

# Live Poll #1

- **What is your role/affiliation to family enterprises?**
  - Member of the family of a family enterprise
  - Non-family executive in a family enterprise
  - Independent board director
  - Consultant or advisor to a family enterprise
  - Other

## Live Poll #2

- **Have you or anyone in your family previously participated in a Family Enterprise Suite program?**
  - Yes
  - No

# Program Suite Overview and Live Virtual Learning Experience

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# Kellogg Family Enterprise Suite

- Designed to support multi-generational continuity of family enterprises, including succession planning, ownership preparation and next generation leadership development
- Offers a multi-disciplinary approach and cutting-edge guidance to address complex family business challenges
- Convenes a global network of successful business families who can learn from each other and make lasting connections
- Powered by the Ward Center's pioneering 20-year legacy of serving families

# 2021 Live Virtual Family Enterprise Programs

Bringing the interactive learning experience of the Kellogg Executive Education Family Enterprise Suite to you



# 2021 Live Virtual Family Enterprise Programs

- **Designed to Maximize Your Learning**  
Innovative and engaging learning methods to help you develop new skills
- **Proven Content and Value**  
Leveraging 20 years of excellence in program design and delivery to add value to your family
- **Engagement with Top Kellogg Faculty**  
Access to Kellogg's renowned thought leaders to discuss issues unique to your family and business
- **Enduring Peer-to-Peer Connections**  
Abundant opportunities to interact and network with your peers from family enterprises
- **Convenience for Your Busy Schedule**  
Offering half-day sessions spread across a multi week experience to meet your needs

# Sample Live Virtual Schedule for Family Enterprise Boards

## Week 1

TIME (US CENTRAL)	WEEK 1 -MONDAY FEBRUARY 1	WEEK 1 -WEDNESDAY FEBRUARY 3	WEEK 1 -FRIDAY FEBRUARY 5
7:30-8:00	<b>Coffee &amp; Connect</b>	<b>Coffee &amp; Connect</b>	<b>Coffee &amp; Connect</b>
<b>SESSION 1</b>	<b>8:00-10:00</b> <b>Course Overview</b> <b>Purpose of the Board</b>  Pendergast	<b>8:00-10:30</b> <b>Good Directors and Good</b> <b>Boards</b>  Zajac	<b>8:00-10:00</b> <b>Strategic Financial Issues for</b> <b>Boards</b>  Petersen
	10:00-10:30 Break	10:30-11 Break	10:00-10:30 Break
<b>SESSION 2</b>	<b>10:30-12:00</b> <b>What do Boards need</b> <b>from owners?</b>  Pendergast & Steve Tourek	<b>11:00-12:30</b> <b>Board Design: Skills and Roles</b>  Pendergast	<b>10:30-12:30</b> <b>Live Family Case: Herschend</b> <b>Family Enterprises</b>   Pendergast
	<b>12:00-12:30</b> <b>Homework Project Intro</b> Pendergast	12:45-1:15 Virtual Lunch (optional)	

# Sample Live Virtual Schedule for Family Enterprise Boards

## Week 2

TIME (US CENTRAL)	WEEK 2 -TUESDAY FEBRUARY 9	WEEK 2 - THURSDAY FEBRUARY 11	
7:30-8:00	<b>Coffee &amp; Connect</b>		
<b>SESSION 1</b>	<b>8:00-10:00</b> <b>Kohler Case</b>  Liberti and Pendergast	<b>3:30-5:00</b> <b>Panel-Boards Role in</b> <b>Succession Planning</b>  Pendergast Meghan Juday, John Thacher Drew Everett	<b>Week 2 Assignment</b>  <b>Schedule 90 minutes at your</b> <b>convenience to meet with your</b> <b>group to receive input on your</b> <b>project</b>
	10:00-10:30 Break		
<b>SESSION 2</b>	<b>10:30-12:30</b> <b>Managing Risk</b>  DeCiantis	<b>5:00-6:30</b>  <b>Happy Hour (BYOB)</b> <b>And</b> <b>Special Event</b>	<b>2:00-5:00 – Office Hours</b> <b>Optional</b>  <b>John L. Ward Center for Family</b> <b>Enterprises, Executive Director,</b> <b>Jennifer Pendergast offering</b> <b>office hours</b>
	12:45-1:15 Virtual Lunch (optional)		

# Sample Live Virtual Schedule for Family Enterprise Boards

## Week 3

TIME (US CENTRAL)	WEEK 3 -MONDAY FEBRUARY 15	WEEK 3 -WEDNESDAY FEBRUARY 17	WEEK 3 -FRIDAY FEBRUARY 19
7:30-8:00	<b>Coffee &amp; Connect</b>	<b>Coffee &amp; Connect</b>	<b>Coffee &amp; Connect</b>
<b>SESSION 1</b>	<b>8:00-10:00</b> <b>The Role of the Family Director</b>  Lansberg or LGA Associate	<b>8:00-9:30</b> <b>The Architecture of the Board: Committees and their Work</b>  Pendergast	<b>8:00-9:30</b> <b>Homework Project Report Out</b>  Pendergast
	10:00-10:30 Break	9:30-10:00 Break	9:30-10:00 Break
<b>SESSION 2</b>	<b>10:30-12:00</b> <b>Leading the Board: The Chair's Role in Culture and Dialog</b>  Pendergast	<b>10:00-11:30</b> <b>Sustainability</b>  Kurtz	<b>10:00-11:30</b> <b>Leveraging Diversity to Strengthen your Board</b>  Pearce
	12:15-12:45 Virtual Lunch (optional)	11:45-12:15 Virtual Lunch (optional)	<b>11:30-12:00</b> <b>Program Close</b> Pendergast

# Live Virtual Offerings in 2021

- **Family Enterprise Boards**  
February 1-19, 2021  
8 sessions (7 morning, 1 afternoon)
- **Forming Family Enterprise Governance**  
March 8-24, 2021  
6 sessions (5 morning, 1 afternoon)
- **Governing Family Enterprises**  
April 12-30, 2021  
9 sessions (all morning)
- **Leading for Impact within Family Enterprises**  
May 3-14, 2021  
10 sessions (8 morning, 2 afternoon)

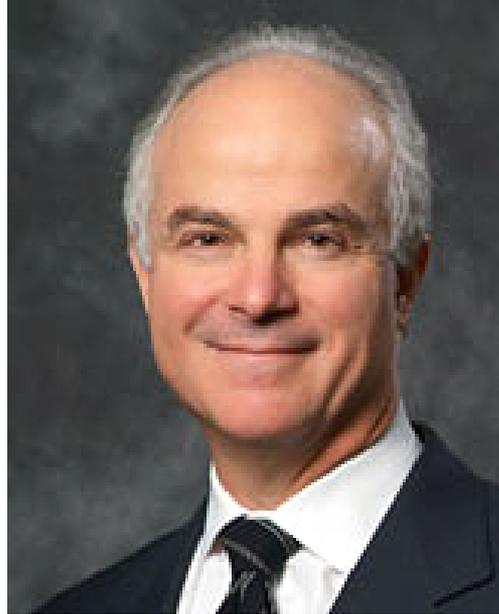
For detailed schedules,  
contact your Program Advisor  
- **Sheneen Landry**  
[s-landry@kellogg.northwestern.edu](mailto:s-landry@kellogg.northwestern.edu)

# Academic Leadership



**Jennifer Pendergast**

John L. Ward Clinical Professor  
of Family Enterprise



**Ivan Lansberg**

Adjunct Professor of John L. Ward  
Center of Family Enterprises



**Brooke Vuckovic**

Clinical Professor of Leadership

# Programs Team



**Sheneen Landry**

Associate Director, Executive Development Advising  
Kellogg Executive Education



**Cindee Bath**

Associate Program Director  
John L. Ward Center for Family Enterprises

# Family Enterprise Boards

February 1-19, 2021

- Empowers current and future directors of family-owned businesses
- Learn to design, engage, and lead boards that leverage their companies' strategic advantages
- Understand the unique challenges of selecting family and non-family directors

# Who is this program for?

## Family Enterprise Boards

*This program is ideal for:*

- Family enterprises who have fiduciary or advisory boards in place or are in the process of building them
- Current family and non-family board directors, trustees and chairs of family-controlled firms
- Family members developing themselves for future roles as board members in their enterprise
- Family and non-family executives who interact with or who will soon be appointed to the board

# Forming Family Enterprise Governance

March 8-24, 2021

- Gain leadership insights on governance architecture and effective decision making to support a vision that will guide multi-generational continuity
- Prepare for the critical time in a family enterprise's evolution when moving from the processes, people and structures that proved successful for a controlling owner to those that support a sibling partnership

# Who is this program for?

## Forming Family Enterprise Governance

*This program is ideal for:*

- Family controlled businesses in the founders and/or sibling stages of ownership who are beginning to build their governance structures
- Members of enterprising families, non-family executives and advisory board members

# Governing Family Enterprises

April 12-30, 2021

- Understand that well-designed governance structures and process are key to success for multi-generational family enterprises
- Build governance systems that sustain family enterprises in the cousin stage and beyond
- Educate and empower multi-generational ownership groups to successfully negotiate generational transitions and ensure continuity

# Who is this program for?

## Governing Family Enterprises

*This program is meant for:*

- Members of family controlled enterprises in the 3rd generation or beyond, with a significant number of family owners and minimum annual revenue of US\$100m with a preference for \$500m or above
- Family and non-family board directors
- Family and non-family CEOs and other senior executives in the business
- Family members involved in governing their family councils, family office or their family foundations
- Family shareholders

# Leading for Impact within Family Enterprises

May 3-14, 2021

- Identify and appreciate multiple spheres of leadership in the family enterprise
- Learn the skills needed to lead with confidence and build a successful enterprise
- Designed with multiple points of personal and group interaction, instructors deliver classroom learning as well as individual and group coaching to build a strong leadership toolkit

# Who is this program for?

## Leading for Impact with Family Enterprises

*This program is ideal for:*

- New or emerging leaders of an enterprising family
- Established family and non-family leaders in roles such as: board chair, CEO or CEO candidate, family council chair, family foundation chair, family office head, family director or trustee

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# For more information:

- The recording of today's webinar will be emailed to all registrants. Feel free to share with your family members!
- Register for our next info session to learn more about **Leading for Impact within Family Enterprise** on December 9 at 12pm CT at [bit.ly/famlead129](https://bit.ly/famlead129)
- Go to [kell.gg/kxfambiz](https://kell.gg/kxfambiz) to visit our program pages
- Contact your Program Advisor – Sheneen Landry  
[s-landry@kellogg.northwestern.edu](mailto:s-landry@kellogg.northwestern.edu)



# Questions?

*THANK YOU FOR  
JOINING US!*

Visit us at [kell.gg/kxfambiz](https://kell.gg/kxfambiz)

