

PART 2

The Enterprise Journey Milestones

We recommend you start your journey by taking a short survey of the important steps in the Enterprise Journey. Check the boxes for any of the activities that are already in progress and compare your assessment with the rest of the family.



Where We've Been and Where We Are Now – pg 60

1	Develop a picture of the current Enterprise and review the benefits for keeping the Enterprise flourishing	Not Started <input type="checkbox"/>	In Progress <input type="checkbox"/>	Finished <input type="checkbox"/>
2	Understand the Enterprise Journey and current generational transitions	Not Started <input type="checkbox"/>	In Progress <input type="checkbox"/>	Finished <input type="checkbox"/>
3	Discuss the evolution and history of the Enterprise to assess its identity and impact in the community	Not Started <input type="checkbox"/>	In Progress <input type="checkbox"/>	Finished <input type="checkbox"/>
4	Investigate the opportunities and risks that affect the Enterprise	Not Started <input type="checkbox"/>	In Progress <input type="checkbox"/>	Finished <input type="checkbox"/>
5	Review the current Enterprise goals and strategies	Not Started <input type="checkbox"/>	In Progress <input type="checkbox"/>	Finished <input type="checkbox"/>
6	Assess Enterprise complexity and manage it with efficient ownership and investment structures	Not Started <input type="checkbox"/>	In Progress <input type="checkbox"/>	Finished <input type="checkbox"/>

Where We Want to Go – pg 76

7	Develop possible scenarios for the future of the Enterprise given the owners hopes and goals	Not Started <input type="checkbox"/>	In Progress <input type="checkbox"/>	Finished <input type="checkbox"/>
8	Articulate a shared vision for the future of the Enterprise using a collaborative process	Not Started <input type="checkbox"/>	In Progress <input type="checkbox"/>	Finished <input type="checkbox"/>
9	Develop clear goals and strategies and gain commitment to support the shared vision and goals	Not Started <input type="checkbox"/>	In Progress <input type="checkbox"/>	Finished <input type="checkbox"/>
10	Create partnerships with external resources where needed to support the goals and strategies	Not Started <input type="checkbox"/>	In Progress <input type="checkbox"/>	Finished <input type="checkbox"/>
11	Identify leadership skills and a leadership succession process needed to support the vision and goals	Not Started <input type="checkbox"/>	In Progress <input type="checkbox"/>	Finished <input type="checkbox"/>
12	Provide option to exit the Enterprise for family members who do not share the future vision and goals	Not Started <input type="checkbox"/>	In Progress <input type="checkbox"/>	Finished <input type="checkbox"/>

How We Plan to Get There – pg 93

13	Design an efficient governance structure and decision-making process that supports the Enterprise goals	Not Started <input type="checkbox"/>	In Progress <input type="checkbox"/>	Finished <input type="checkbox"/>
14	Develop clear levels of authority and accountability for governance councils, boards and committees	Not Started <input type="checkbox"/>	In Progress <input type="checkbox"/>	Finished <input type="checkbox"/>
15	Identify a formal process to assess and mitigate Enterprise risks on a periodic basis	Not Started <input type="checkbox"/>	In Progress <input type="checkbox"/>	Finished <input type="checkbox"/>
16	Develop a methodology for allocating capital and resources across the Enterprise domains	Not Started <input type="checkbox"/>	In Progress <input type="checkbox"/>	Finished <input type="checkbox"/>
17	Develop written Charters to codify family goals and Enterprise agreements	Not Started <input type="checkbox"/>	In Progress <input type="checkbox"/>	Finished <input type="checkbox"/>
18	Identify metrics to monitor performance and ensure family satisfaction with the outcomes	Not Started <input type="checkbox"/>	In Progress <input type="checkbox"/>	Finished <input type="checkbox"/>