

PART 1

The Family Journey Milestones

We recommend you start your Family Journey by reviewing these important milestones that are presented in Part 1. Check the boxes for any of the activities your family has started or completed, and if you have completed all 15, then move directly to Part 2 to investigate the Enterprise Journey.



Where We've Been and Where We Are Now – pg 20

1	Map the family's history to identify patterns, values and guiding principles from the past that inform the future.	Not Started <input type="checkbox"/>	In Progress <input type="checkbox"/>	Finished <input type="checkbox"/>
2	Identify the patterns, values, and guiding principles to carry forward and those to leave behind.	Not Started <input type="checkbox"/>	In Progress <input type="checkbox"/>	Finished <input type="checkbox"/>
3	Assess the family's current culture and discuss key communication styles that impact relationships and outcomes.	Not Started <input type="checkbox"/>	In Progress <input type="checkbox"/>	Finished <input type="checkbox"/>
4	Identify family polarities and core family values to strengthen relationships.	Not Started <input type="checkbox"/>	In Progress <input type="checkbox"/>	Finished <input type="checkbox"/>
5	Agree on the family's definition for inclusiveness, levels of engagement, and responsible ownership.	Not Started <input type="checkbox"/>	In Progress <input type="checkbox"/>	Finished <input type="checkbox"/>

Where We Want to Go – pg 32

6	Discuss the benefits of keeping the family together and aligning family interests and goals.	Not Started <input type="checkbox"/>	In Progress <input type="checkbox"/>	Finished <input type="checkbox"/>
7	Examine the levels of trust needed to build strong relationships in the family.	Not Started <input type="checkbox"/>	In Progress <input type="checkbox"/>	Finished <input type="checkbox"/>
8	Discuss the family's current generational bridge and its impact on family goals.	Not Started <input type="checkbox"/>	In Progress <input type="checkbox"/>	Finished <input type="checkbox"/>
9	Develop a timeline for known transitions and trigger events and assess the family's readiness for change.	Not Started <input type="checkbox"/>	In Progress <input type="checkbox"/>	Finished <input type="checkbox"/>
10	Build a continuous learning culture across the family and identify desired skills and skill gaps.	Not Started <input type="checkbox"/>	In Progress <input type="checkbox"/>	Finished <input type="checkbox"/>

How We Plan to Get There – pg 44

11	Develop the family skillsets to manage complexity and conflict.	Not Started <input type="checkbox"/>	In Progress <input type="checkbox"/>	Finished <input type="checkbox"/>
12	Identify a transparent decision-making process that the family trusts.	Not Started <input type="checkbox"/>	In Progress <input type="checkbox"/>	Finished <input type="checkbox"/>
13	Design and communicate an objective process for selecting future leaders for the family.	Not Started <input type="checkbox"/>	In Progress <input type="checkbox"/>	Finished <input type="checkbox"/>
14	Offer a variety of opportunities for participation and leadership based on individuals' areas of interest.	Not Started <input type="checkbox"/>	In Progress <input type="checkbox"/>	Finished <input type="checkbox"/>
15	Develop a learning 'launch pad' to educate all family members on important topics of interest.	Not Started <input type="checkbox"/>	In Progress <input type="checkbox"/>	Finished <input type="checkbox"/>