# Family Business Talent Governance Training Course

21 – 25 June 2027
San Diego

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**Ref:** 1629_220327 **Date:** 21 – 25 June 2027 **Location:** San Diego **Fees:** 14000 Euro

## Overview

Family Business Talent Governance Training Course is a one-week course for family enterprise owners, next-generation leaders, family office executives, HR leaders, and governance professionals who leave with a Family Talent Governance Charter. Participants align family employment policy, merit-based entry, role boundaries, leadership pipelines, professional manager retention, and transition coverage. The course separates family, ownership, governance, and management decisions while protecting fairness and continuity. Agile Leaders Training Center develops family business talent governance.

## Who Should Attend

- Owning-family functions responsible for expectations, values, participation, and generational continuity
- Governance functions responsible for family councils, boards, committees, and role boundaries
- People functions responsible for family employment rules, executive talent, and fair progression
- Family office functions responsible for next-generation education, development records, and coordination
- Enterprise leadership functions responsible for professional management capability and succession coverage

The course assumes participants already contribute to family, governance, people, or leadership decisions and leaves out legal drafting, estate planning, ownership transfer, and tax advice.

## Departments and Industries

The course supports departments and industries where family ownership intersects with enterprise talent decisions.

- Family councils, owner offices, and family governance committees
- Boards, nomination committees, and executive leadership
- Human resources, talent management, and leadership development
- Family-owned industrial, trading, retail, and service groups
- Family offices, investment companies, and operating portfolios

## Learning Objectives

By the end of this course, participants will be able to:

- Analyze family, ownership, governance, and management role boundaries
- Build merit-based family employment and progression rules
- Evaluate next-generation readiness for different enterprise roles
- Compare family and non-family leadership pipeline options
- Prioritize professional manager retention and transition safeguards
- Use talent governance forums, records, and measures for accountable decisions

## Course Agenda

### Day 1: Family Enterprise Role Architecture

- Three-Circle Role and Interest Map
- Family, Ownership, Governance, and Management Boundary Matrix
- Family Enterprise Talent Stakeholder Map
- Role Eligibility and Decision-Rights Register
- Talent Governance Risk and Conflict Register

### Day 2: Family Employment and Merit

- Family Employment Policy Design Canvas
- Entry Qualification and External Experience Criteria
- Merit-Based Selection and Appointment Rubric
- Family Member Performance and Progression Protocol
- Conflict-of-Interest Disclosure and Recusal Checklist

### Day 3: Next-Generation Development

- Next-Generation Interest and Readiness Profile
- Owner, Governor, and Manager Capability Matrix
- Education, Mentoring, and Experience Pathway Map
- Governance Role Apprenticeship Plan
- Next-Generation Development Evidence Portfolio

### Day 4: Leadership Pipelines and Retention

- Family and Non-Family Leadership Pipeline Map
- Critical Executive Succession Coverage Matrix
- Professional Manager Value Proposition Canvas
- Executive Retention and Trust Diagnostic
- Interim Leadership and Transition Safeguard Plan

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## Day 5: Talent Governance Practice

- Exercise: Resolve a Family and Management Role Conflict
- Exercise: Assess a Family Employment Decision
- Exercise: Review a Next-Generation Readiness Case
- Exercise: Design a Professional Leadership Continuity Response
- Capstone Exercise: Family Talent Governance Charter

## Practical Exercises

The course uses suggested activities to test family enterprise talent decisions across ownership and operating settings.

- Suggested activity: map role boundaries for a family member who is simultaneously an owner, director, and executive.
- Suggested activity: apply entry and merit criteria to family and non-family candidates for a critical role.
- Suggested activity: build a development pathway for a next-generation candidate with incomplete readiness.
- Suggested activity: combine succession coverage with retention safeguards for a professional executive team.

## FAQs

### Who suits family business talent governance training, and what does it assume?

Family business talent governance training suits owners, family office teams, people leaders, directors, and executives who already contribute to employment, development, appointment, succession, or governance decisions in a family enterprise.

### How does family business talent governance differ from general talent management training?

Family business talent governance addresses overlapping family, ownership, board, and management roles; family employment rules; next-generation readiness; professional manager trust; and conflict safeguards rather than a standard corporate talent cycle alone.

### What should a family employment policy cover?

A family employment policy should define eligibility, qualifications, external experience, application and selection, reporting lines, compensation principles, performance review, promotion, conduct, conflicts, development, exit, and the authority responsible for exceptions.

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## How should next-generation readiness be assessed in a family enterprise?

Next-generation readiness should be assessed against the specific owner, governance, or management role, using evidence of capability, experience, judgment, values, commitment, relationships, and development progress rather than family seniority alone.

## How can family businesses retain professional non-family leaders?

Family businesses retain professional leaders through clear authority, fair progression, reliable governance, competitive conditions, access to decision makers, trust, protection from family interference, transparent succession expectations, and recognition of professional contribution.

## Conclusion

Participants take back a Family Talent Governance Charter linking role boundaries, family employment, merit, next-generation development, professional leadership, succession, retention, and decision forums. The charter changes informal expectations into reviewable talent rules and evidence. It helps the family and enterprise preserve relationships while making fair, capable, and continuity-focused appointments.