

# Next-Gen Leadership Readiness Assessment

## PHASE 1: INDIVIDUAL INTEREST & VISION

- **Passion vs. Pressure:** Does the family member actively seek increased business involvement, or are they participating to accommodate family expectations or guilt?
- **The Three-Year Vision:** If they were sitting here three years from today, what must have happened for them to feel happy with their progress?
- **Identity:** Do they have a compelling vision for what the company contributes to society that differs from the previous generation's?

## PHASE 2: CAPABILITIES & EXPERIENCE

- **Outside Experience:** Has the individual gained professional experience outside the family business to develop a professional identity independent of the "safety net"?
- **Core Competencies:** How do they rank on critical behaviors like marketplace insight, team leadership, results orientation, and collaboration?
- **Resilience:** How have they handled a specific business failure? Can they articulate what they would do differently now that they know what they know?

## PHASE 3: FAMILY & BUSINESS ALIGNMENT

- **Psychological Ownership:** Do they feel they have a say in the direction of the enterprise, or do they feel their voice is unheard despite their title?
- **Role Clarity:** Are they clear on who has the final say (the "accountable" person) for their specific division or project?
- **Value Alignment:** Can they document how their leadership style helps the organization stay aligned with the family's core values?

## Scoring Your Transition Stage

The data gathered from the above three diagnostic phases determines which of the four stages in the Transition Pipeline a leader is ready to enter.

STRONGEST IN PHASE 1	STRONGEST IN PHASE 2	STRONGEST IN PHASE 3	STRONGEST IN PHASE 4
<p><b>Shadow Stage</b> The leader has the passion but needs more exposure to "different hats" and the complexity of the business's four interchanges.</p>	<p><b>Collaborative Stage</b> Skills are proven; the leader is ready to start co-managing key relationships and participating in high-level strategic meetings.</p>	<p><b>Lead Stage</b> Roles and values are clear; the leader is ready for primary accountability over a specific project or division with established guardrails.</p>	<p><b>Steward Stage</b> The leader has demonstrated readiness for a full transition of authority with professional board-level oversight.</p>