THE ENGAGEMENT TOOLKIT

AND ENGAGEMENT TOOLKIT TRAINING

The Engagement Toolkit Training program teaches family business advisors the governance concepts they need to help their clients develop engagement, alignment, and governance to fit the needs of the client family.

Through the Engagement Toolkit Training, advisors gain access to the robust educational materials of the Engagement Toolkit to facilitate their engagement and governance work with clients.

The Engagement Toolkit includes six modules. Each focuses on specific tools business-owning families need to be an enterprising family together.

Toolkit Modules 1 and 2 develop the engagement and alignment that are essential for governance to be carried out successfully.

- Module 1 introduces Core Capital, including human, financial, and enterprise capital, providing new metrics for families to measure the value of their business—because family businesses have more at stake than money.
- Module 2 focuses on Shared Purpose, Vision, and Mission, the foundation for all decision making within the family business.

Modules 3 and 4 help families develop the awareness and habits that will underlie good governance.

- Module 3 introduces three forums key to effective family business governance—the Owners Council, the Board of Directors, and the Family Council—and describes how family members can navigate belonging to multiple forums.
- Module 4 builds the skill of conducting effective meetings, helping clients raise the quality of decision-making within their forums.

Modules 5 and 6 help families clarify accountability and define the inter-related responsibilities of their governance forums.

- Module 5 focuses on Decision Grids, which help families allocate decision-making responsibilities among forums and stakeholders while ensuring multiple perspectives are brought to the table.
- Module 6 describes the process of articulating policies to guide decision-making, particularly around important issues for family businesses that are likely to arise more than once.

Engaged Ownership offers materials to help you use the Engagement Toolkit in your work with clients. The toolkit process is flexible—as an advisor, you can use the Toolkit materials in different ways according to the scope of the project and the needs of your client.

- The Engagement Toolkit Omnibus – A workbook that includes learning materials and exercises for all six modules. Each participant in an Engagement Toolkit session will need their own Omnibus.

- The Engagement Toolkit videos – Brief videos that introduce families to Toolkit concepts and prepare them for working with the Omnibus.

- *Engaged Ownership: A Guide for Owners of Family Businesses* – *Engaged Ownership*, written by Engaged Ownership founder Amelia Renkert-Thomas, illustrates the process of the Engagement Toolkit through the Owen Family as they navigate a generational transition in their business. *Engaged Ownership* is also useful for demonstrating the substantial benefits of the process to family business clients.

- The Engagement Toolkit Map – a graphic overview of the Toolkit process and how it works. This is a useful document for sharing the Toolkit process with clients.

- Bespoke meeting materials – We can help you by developing family meeting materials, sample policies, custom facilitation documents and educational materials built to fit your individual client project needs.

For more information, please contact Nathaniel Squires via office@engagedownership.com.