

# Doing Life & Business With Your Family

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WITHOUT BURNING THE CANDLE AT BOTH ENDS!



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SHANNON GOOD, PARTNER  
BRAD GOOD, PARTNER

# Behind Every Small Business is a FAMILY!

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**2 Generations**

**4+ Generations**

**Husband-Wife**

**3 Generations**

**‘Like Family’  
picking up the mantel**

**‘Married Into  
the Biz’**

# Behind Every Small Business is a FAMILY!



# Behind Every Small Business is a FAMILY!

- ✓ Communication
- ✓ Identifying Roles
- ✓ Being Aware of the Workplace Environment
- ✓ Setting Boundaries
- ✓ Creating a Plan
- ✓ Being Open to the “New” and the “Old”

# Communication

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# Communication



# Communication

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*“The most important thing  
in communication is to hear  
what ISN’T being said.”*  
*- Peter Drucker*

# Communication

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## Aim for clarity.

- Ask questions
- Repeat what you hear
- Make sure you are both on the same page
- Then move on ... Don't bring it home!



## Leverage face-to-face workplace communication.

- Make eye contact!
- Know where, when & how to communicate, as well as the what in front of your staff.
- Recognize non-verbal communication/cues.  
**AND IF** there is body language or facial expressions that can't be hidden, **hide in your office, fake it, or resolve it BUT don't make it public.**



## Remember, it goes both ways!

- *Refer to identifying "roles" - NEXT SLIDE PLEASE*



# Identifying Roles

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# Identifying Roles

## EVERY WORKPLACE TEAM



# Identifying Roles

Do you want to speak  
to the man in charge?  
Or, the woman who  
knows what's  
going on?!



somee cards  
user card

## Identifying Roles

*“Everyone has a **ROLE**  
to play.”*

*- Jane Goodall*

# Identifying Roles



## Define titles & job descriptions

- Consider how the staff will respond/respect.
- Clarify hierarchy, which may be different within different departments.
- Respect and support non-family supervisors who supervise your family members.
- Identify strengths and weaknesses, which may be different in the workplace versus home.

*For example, Shannon claims she is the boss from 9am-5pm and then again from 5:01pm-8:59am.*

***NOT A GOOD EXAMPLE!***

*For example, if one family member is the sales manager and the other the service manager, the sales manager can't tell the service team to do something that is not best practice for installation or maintenance. Just because you both have the same family name, doesn't equal the same authority. See previous slides about communication.*

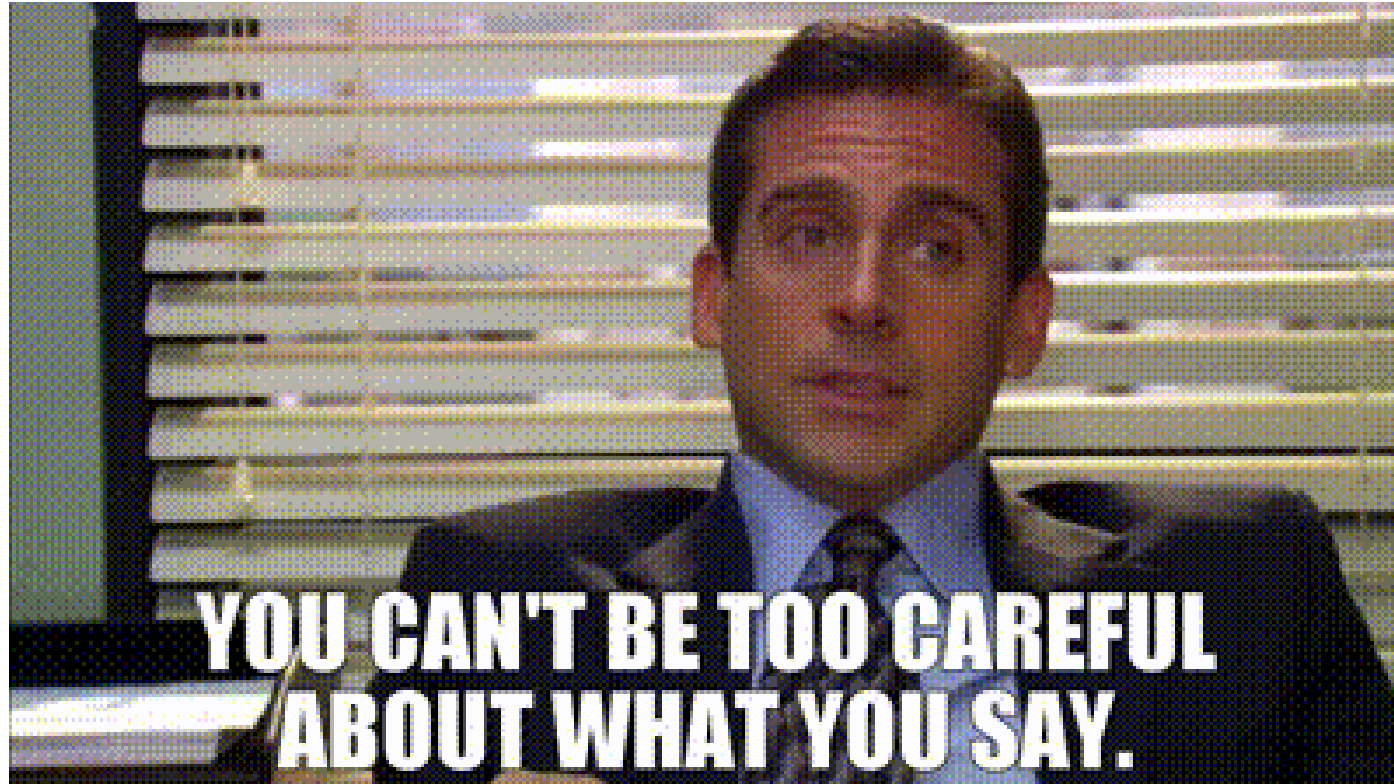
***Stay in your lane!***

# Being Aware of the Workplace Environment



# Being Aware of the Workplace Environment

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## Workplace Environment

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*“I’m staying home today  
because I have **MOOD**  
poisoning.”*

Leave personal disagreements  
out of the workplace.



# Workplace Environment

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## Seek to solve conflicts, not create them.

- Be careful not to contradict or undermine a family member
- Don't let employees "pit mom and dad" against each other
- Define a standard response, for example:

*For example, "What did Shannon tell you?"*

*"Unless Brad told you to do something else."*



## Respect unique family personalities.

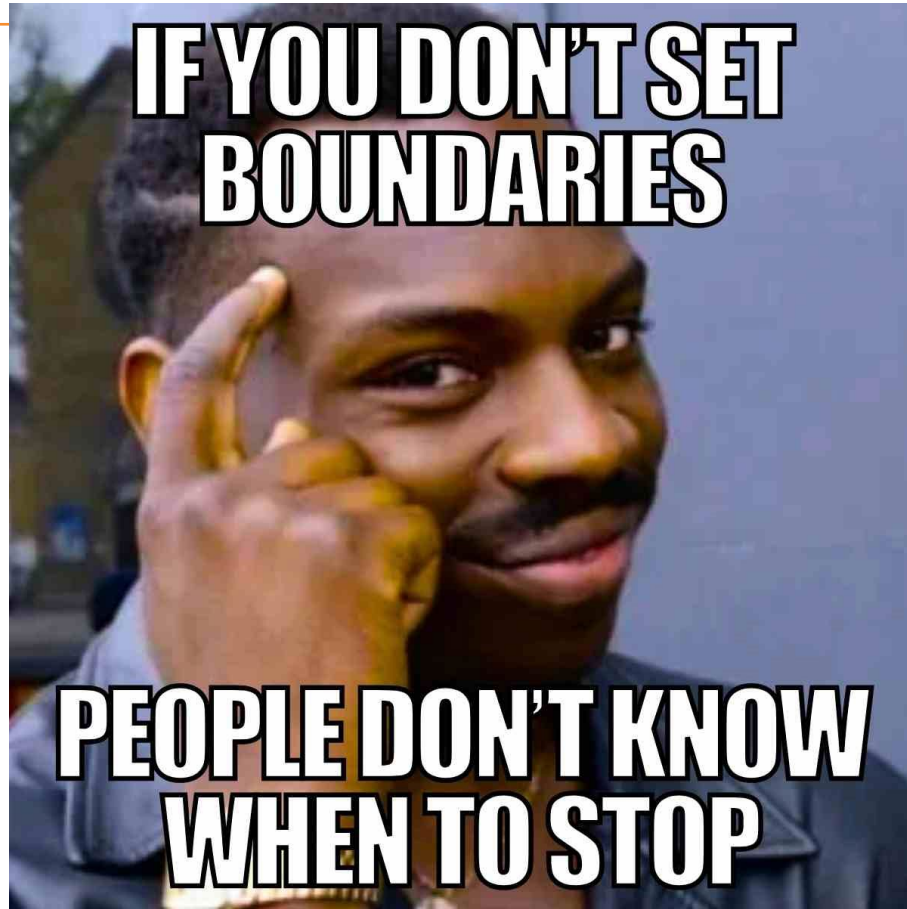
- Not every personality deals with situations in the same manner, even though you are family.

*For example, introvert, extrovert, leader, follower, calming, reactive*

- Keep it professional - no name calling even when teasing - it creates disrespect and/or an uncomfortable environment.

*For example, Brad calling Shannon Schmoopie across the office. Or, two siblings shouldn't call each other morons in the warehouse.*

# Setting Boundaries



## Setting Boundaries

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*“Boundaries need to be  
communicated FIRST verbally,  
and THEN with actions.”*

*- Henry Cloud*

# Setting Boundaries



## Define times and place to discuss OR not to discuss work.

- Ask permission to schedule a time to discuss a work topic outside the office.

*For example, go to breakfast, or ask when a family member is free to discuss it.*

- Create a transition from work to home.

*For example, work out, go shopping, take the dogs for a walk.*

- Create a bubble at home where work conversations are not allowed.

*For example, in the bedroom; at dinner.*

*For example, not in front of other family members who are not involved in the business.*

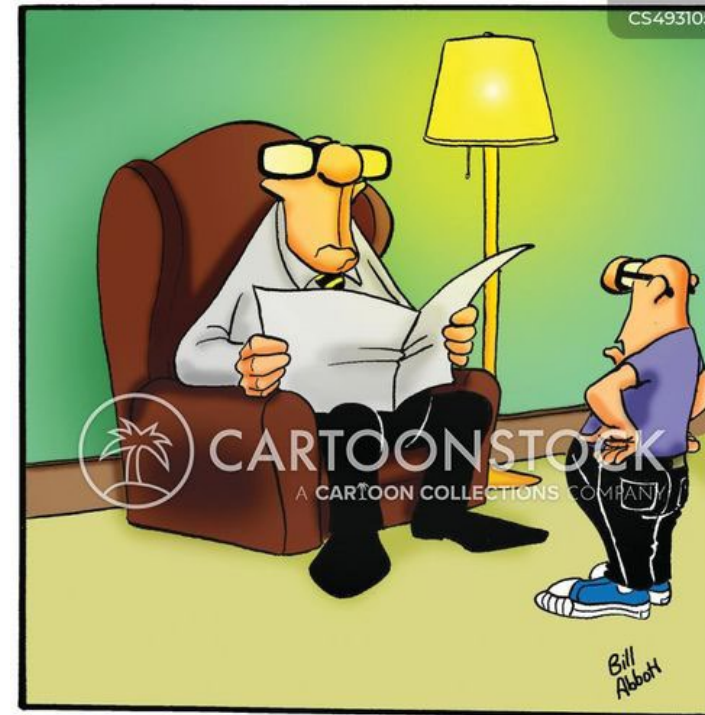
- If something is urgent to one family member, the other(s) should respect that urgency and be accommodating.

- Draw a line between work and personal life in certain scenarios.

*For example, no work discussions on family vacations (unless you're having your annual corporate meeting poolside on your Hawaii vacation, for tax purposes).*

*For example, if it's not an emergency, it can wait until next business day.*

# Creating A Plan



“I won’t inherit doodly-squat at the rate you’re going!”

*“You call it Chaos...  
We call it Family.”*

## Creating A Plan



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# Creating A Plan

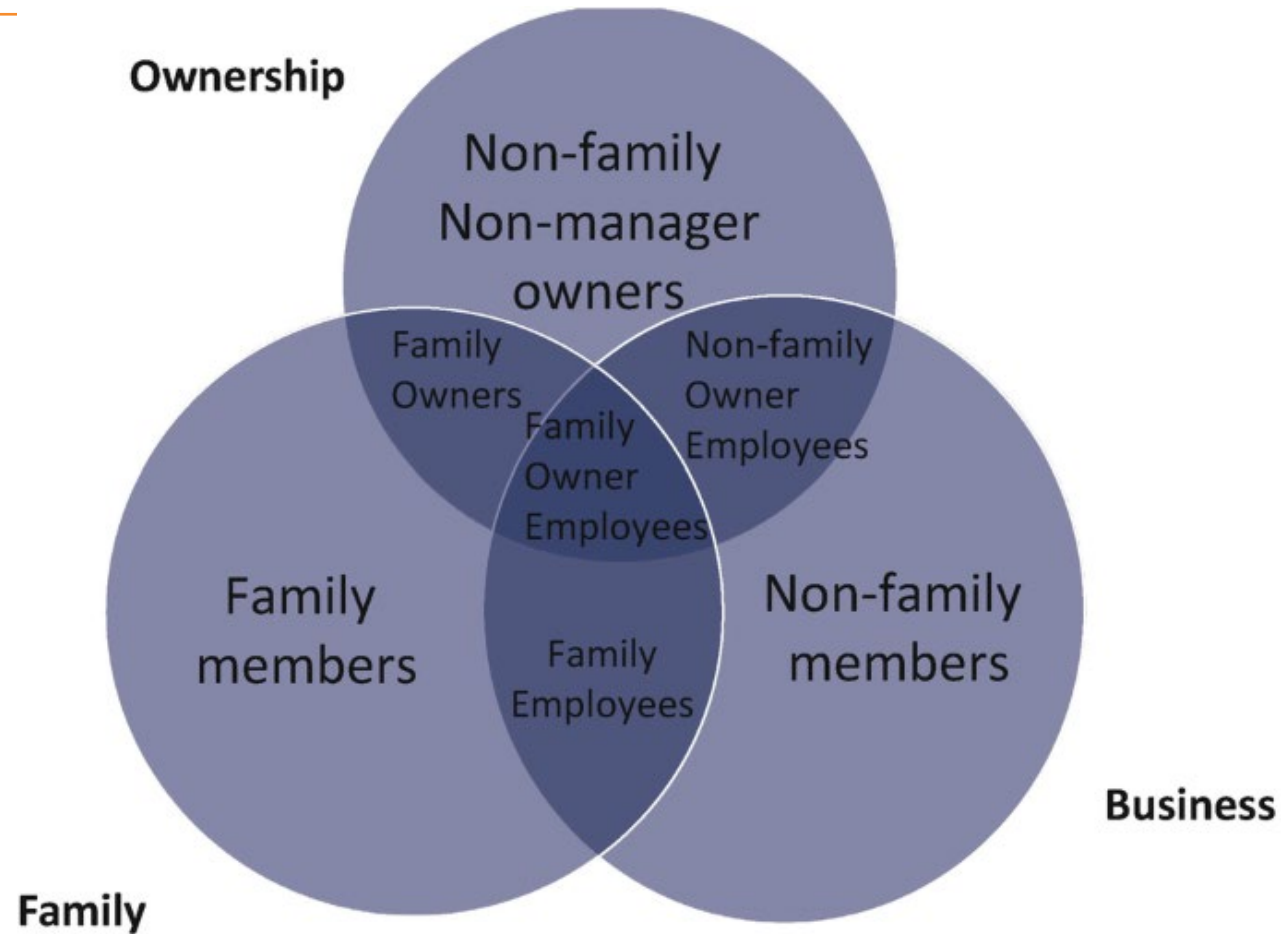


## Succession Plans

- Communicate business goals with family members.
- Don't assume your plans are their plans – Ask them if they want to inherit the business and take on new responsibilities.
- Discuss non-family members role in the succession plan.

*Manage everyone's expectations.*

# Creating a Plan by Expanding the Family:





# Creating A Plan



## Define Timelines

- Consider everyone's timelines.
- Consider the unexpected.

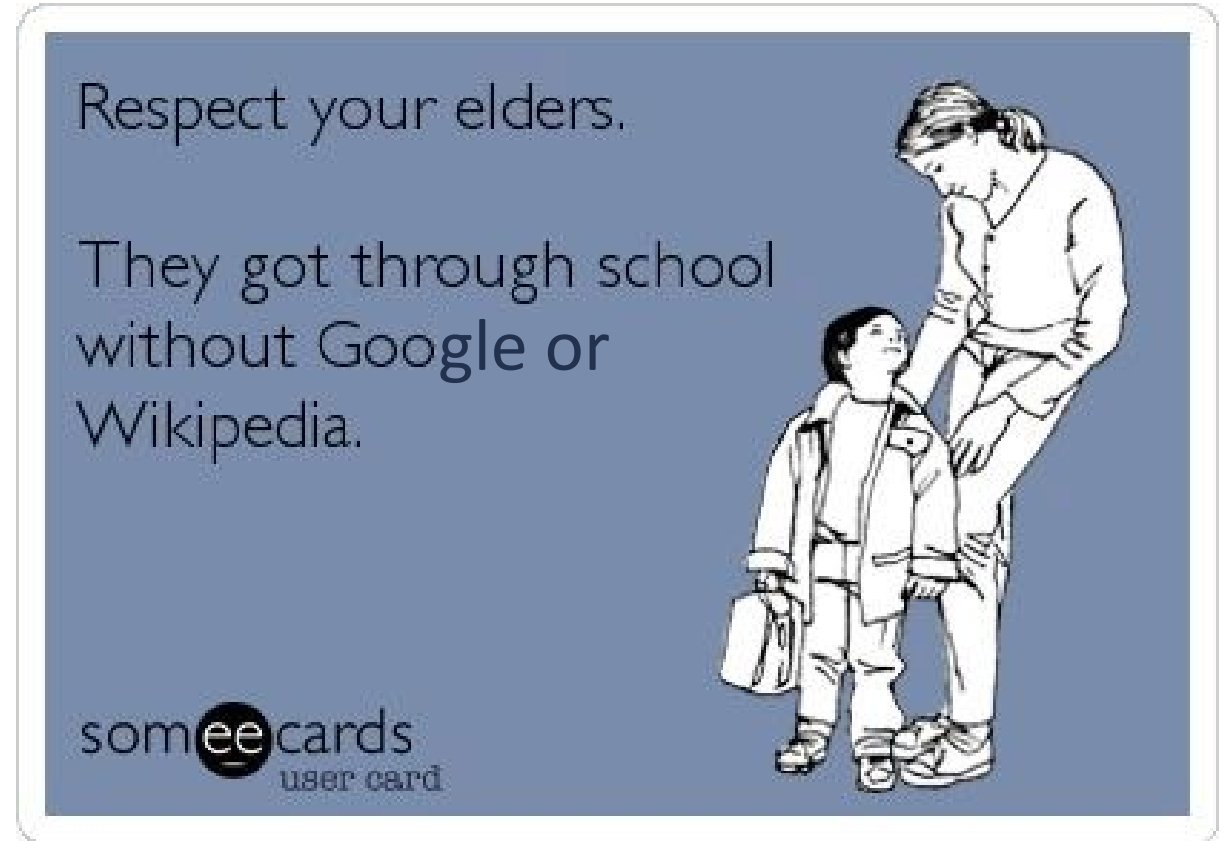
*For example, COVID, technology, industry changes.*

- Be flexible!

# Being Open to the “New” & the “Old”



“Without a Facebook presence there’s no evidence that you ever existed.”



Being Open to  
the “New” and  
the “Old”

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*“Too old for Snapchat;  
Too young for Life Alert.”*

*“New information -  
new or old - makes fresh  
ideas possible.”*

# Being Open to the “New” and the “Old”

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## “Old” Experienced Family Members

### BENEFITS:

- Industry knowledge
- Real world scenarios
- Perspectives
- Confidence

### CONS:

- Confidence
- Perspectives
- Real world scenarios

**MANAGE ATTITUDES: “Been there, done that” results in closed minds, stagnation & torn relationships.**

# Being Open to the “New” and the “Old”

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## “New” Enthusiastic Family Members

### BENEFITS:

- Technology experience
- Naiveté = Energy
- Thinking outside the box

### CONS:

- Thinking outside the box doesn't consider what's in the box might be pretty good.
- Naivete = Hard lessons learned

**MANAGE ATTITUDES: “OK Boomer” results in closed minds, stagnation & torn relationships.**

# Disclaimer



# Discussion & Questions



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