

# Family Transitions: Why They Stall and Restoring the Flow

**Your (place) for  
positive change.**

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# Plan

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- A systems perspective
- Three types of lifecycles - individual, family, business
- What does transition mean?
- What happens when transitions stall?
- What can be done?
- The task – to work our way through a family's transitions and explore how these might impact the business

# Our Focus

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- We often think about the business and work back to the family
- In this workshop we are going to focus on the family and consider how this impacts the business
- You may recognize your family and business in our case example because these are universal experiences
- This is an imaginary family, but you may take away some ideas that could apply to you

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# First, Some Theory



# What Do We Mean By a System?

## A theoretical orientation

- Individuals, families and businesses live in relationship with each other.
- Each person is part of a bigger pattern that unfolds over time
- This pattern is orderly and predictable with each person playing their formal and informal role
- Each person's behaviour is influenced by others, and each play a part in maintaining the arrangement- this does not mean everyone has equal power
- Symptoms like anxiety, depression, conflict are seen as part of that system's functioning
- Families and businesses are embedded in the wider social and political world

# A Systems Approach

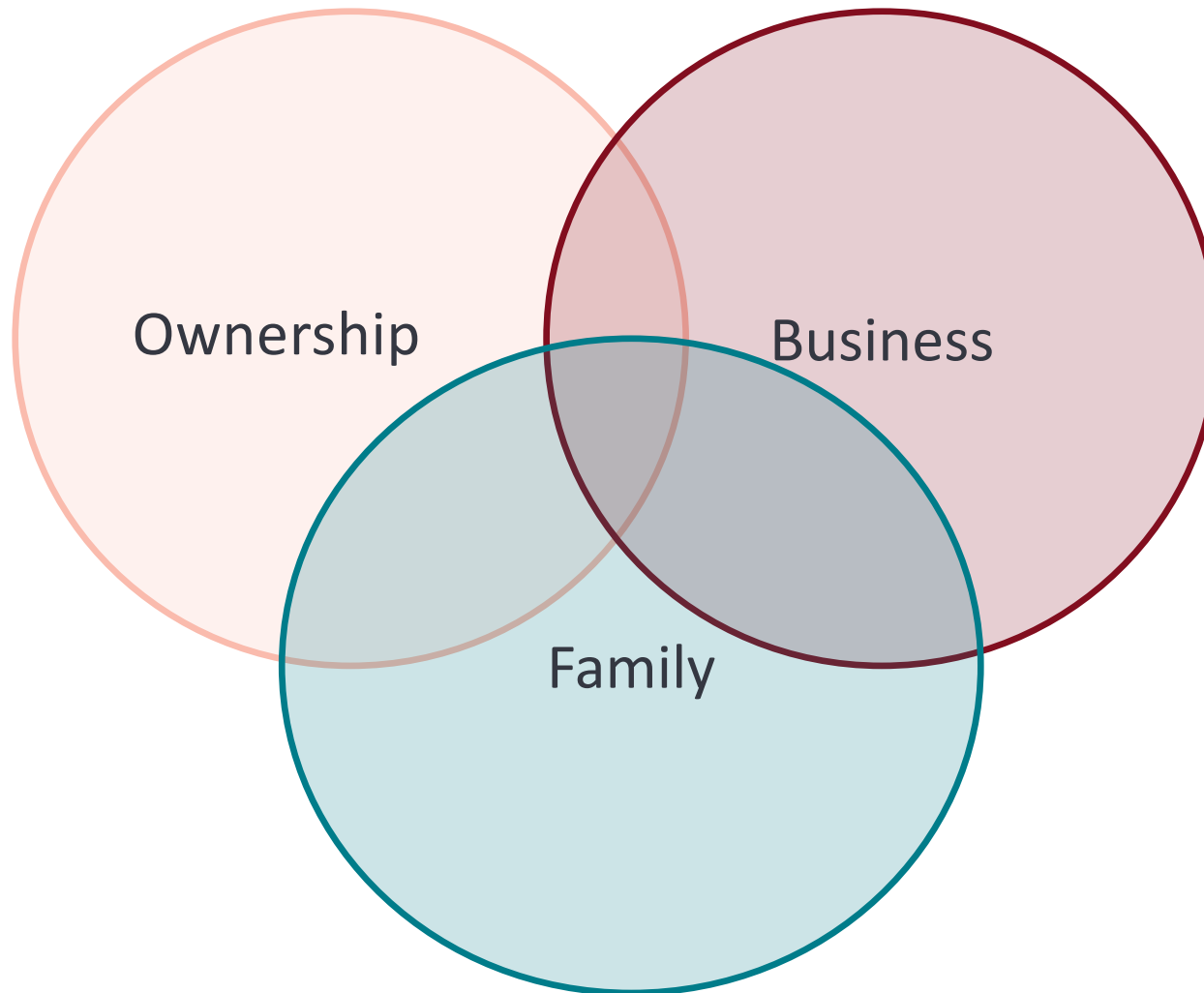
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**What are the qualities that enhance growth and change**

- Communication
- Boundaries
- Rules
- Roles
- Balance of responsibility and authority

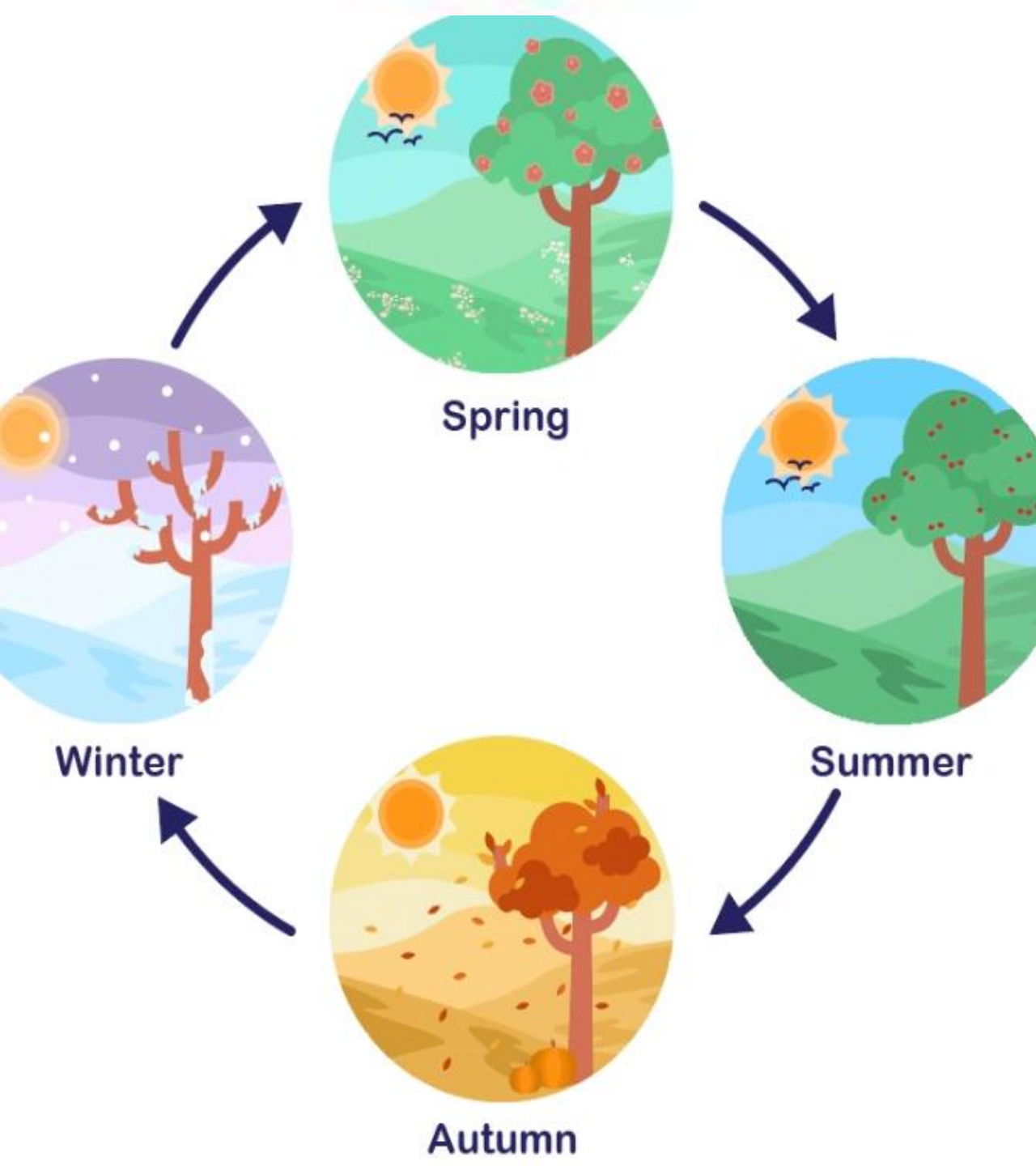
# The Three Circles

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# Three Intersecting Lifecycles

# The Individual Lifecycle

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- Baby
- Toddler
- Child
- Adolescent
- Young adult
- Middle age
- Elderly

# The Family Lifecycle

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- Young family
- Adolescents and young adults
- Adult children leaving home
- Grandparents

# Now it's More Complicated

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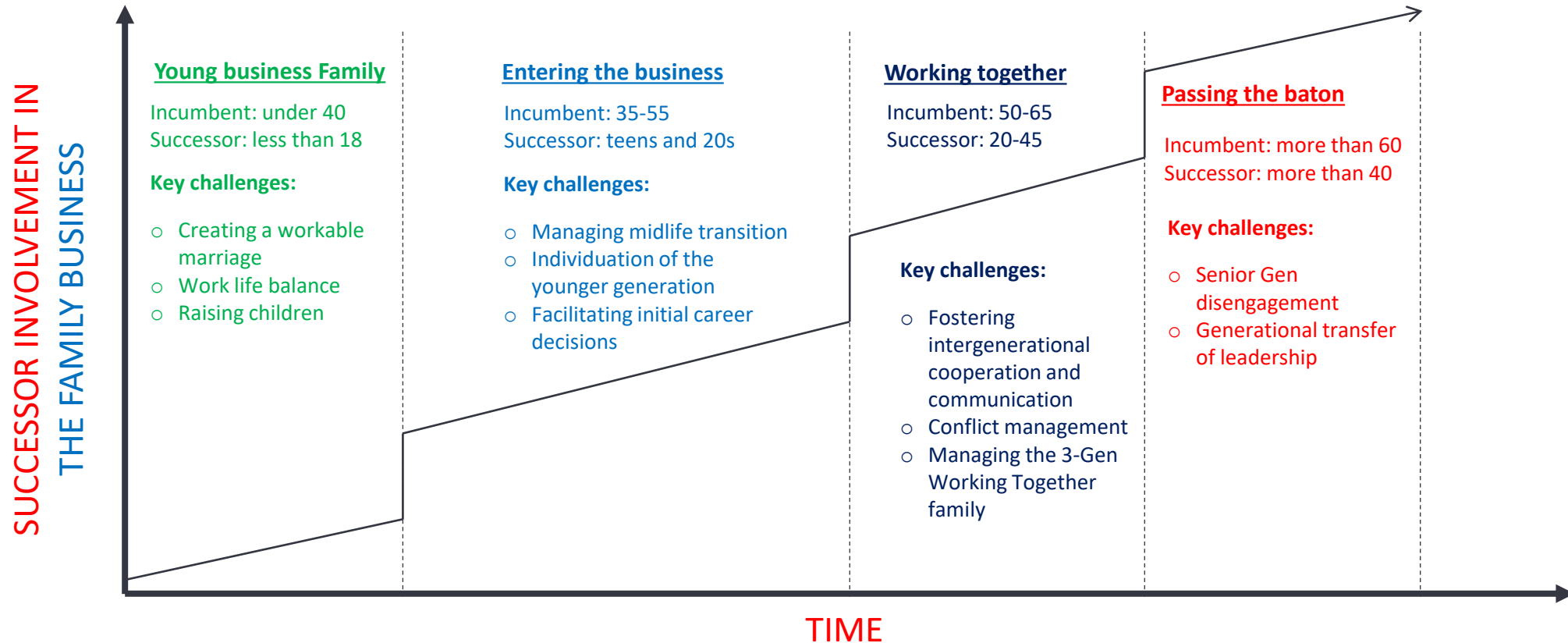
- Divorce and remarriage and more children
- Single parents
- Economic circumstances mean children don't leave home
- Trans, bisexual mean different household configurations and expectations
- Greater mobility, children move interstate
- Longer life span

# The Family & Business Lifecycle

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- Young family, young business
- Adolescents and young adults
- Adult children, leaving home, enter / work in the business
- Grandparents, founders near retirement
- If this is a business that was founded by a previous generation its even more complicated

# One intergenerational dyad over time...



Adapted by Francesco Barbera from: Gersick, K. E. (1997). *Generation to generation: Life cycles of the family business*. Harvard Business Press.

# Stability and Change

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- For life to progress along the expected path we need a balance of stability and change
- Stability allows consolidation of skills in the individual and relationships in the family
- Change allows the individual and the family to reach the next expected life phase as time passes and it becomes appropriate

# What Do we Mean by Transitions?

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## When things need to change

- Change may be expected and a result of normal growth and development  
or
- Unexpected



# What makes Transitions Difficult ?

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- When individuals and families fail to change the way they are in the world and with each other, difficulties appear
- If these are not addressed, they are expressed as symptoms
- A family's inability to transition to the next life phase can present in a symptom in any family member e.g. anxiety, alcohol misuse, conflict, school refusal

# They Require Something Different

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- A change is required in the roles each person takes
- The rules of how we are as a family also need to change
- The proper balance of authority and responsibility must be restored
- As the new rules and roles are developed there is a time of instability and possible discomfort
- When there is a family business this may impact the current functioning and future of the business

# What Qualities Support Transition?

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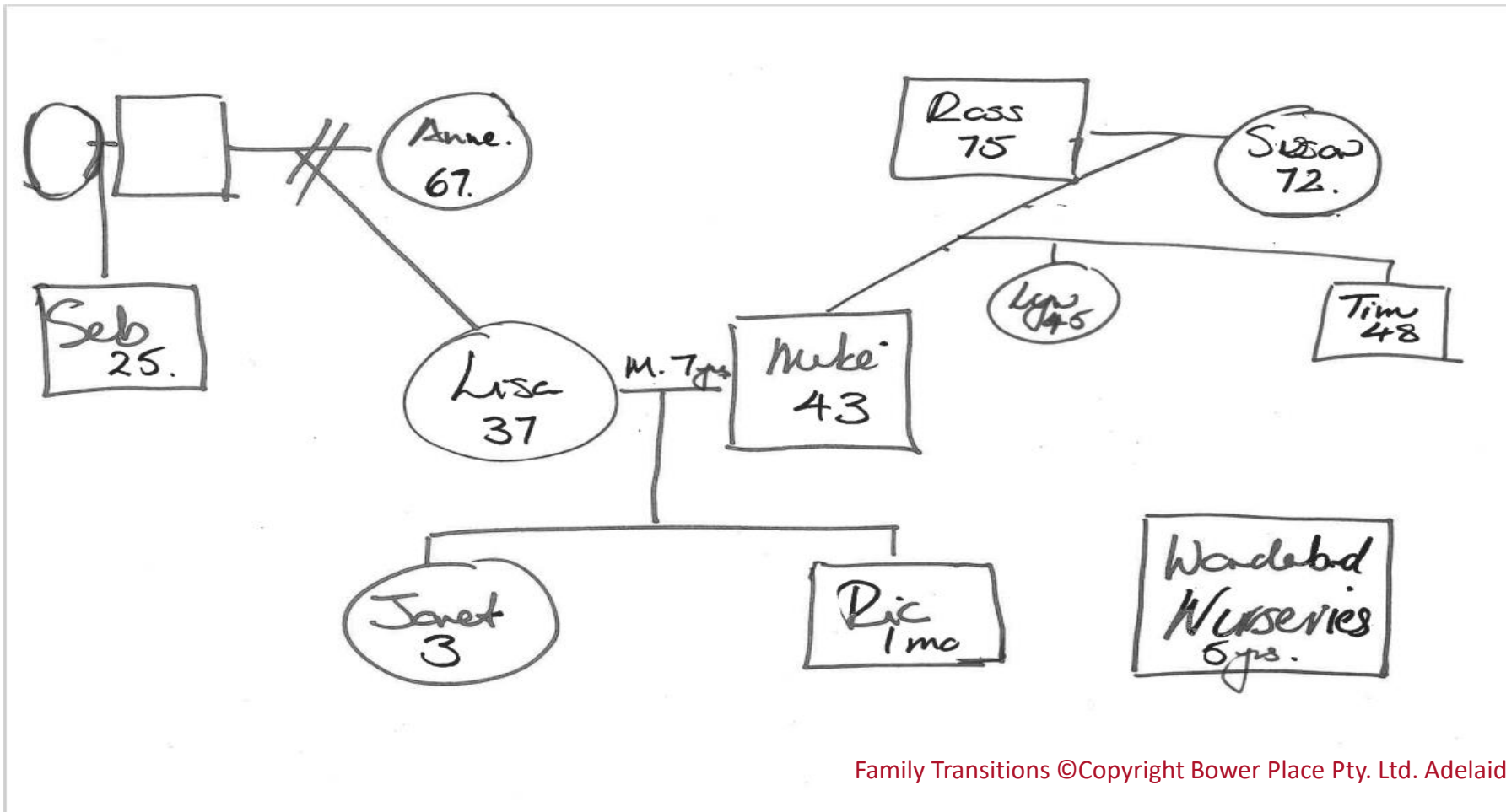
- Communication
- Boundaries
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- Roles
- Balance of responsibility and authority

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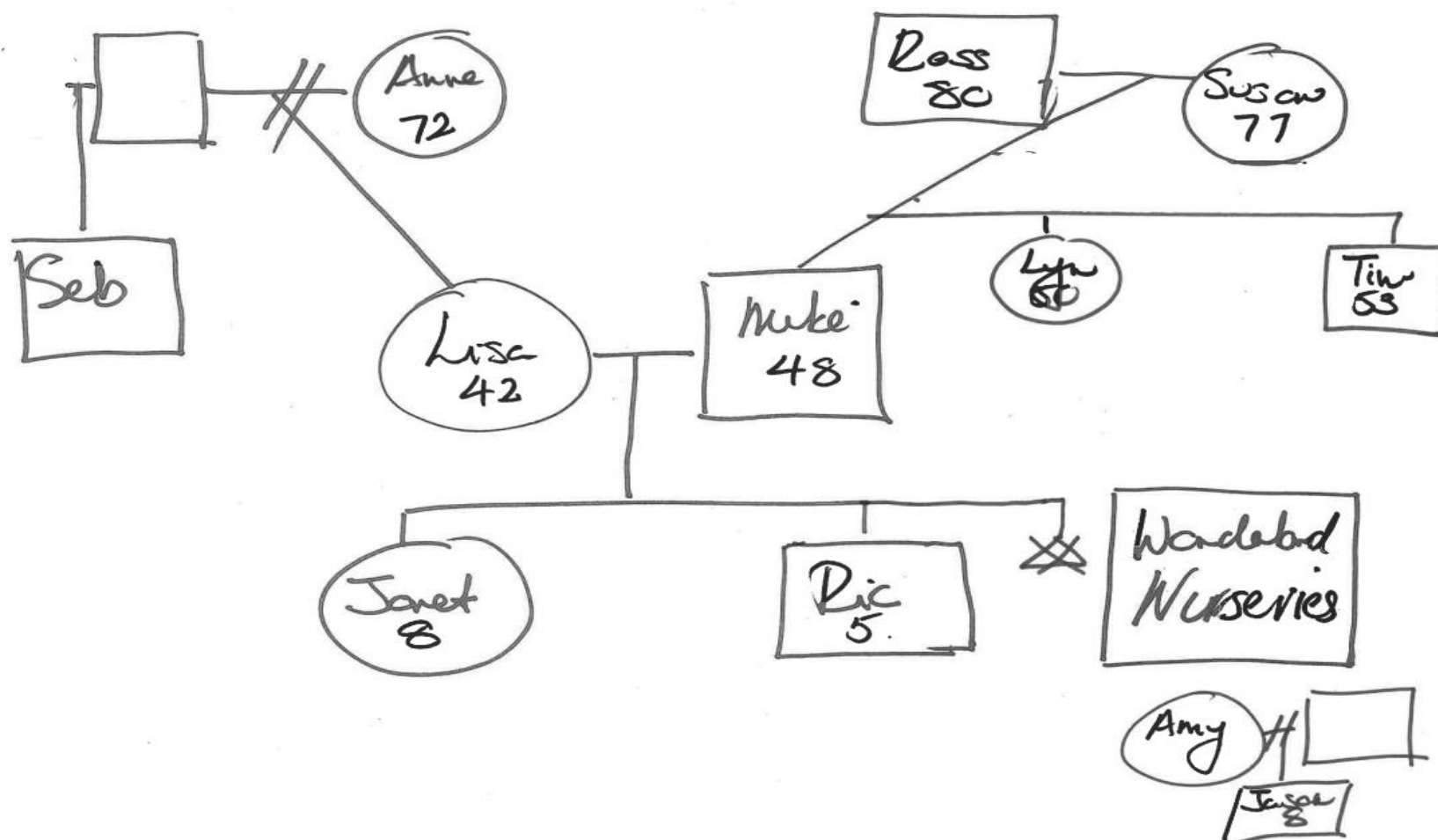


# A Case Study

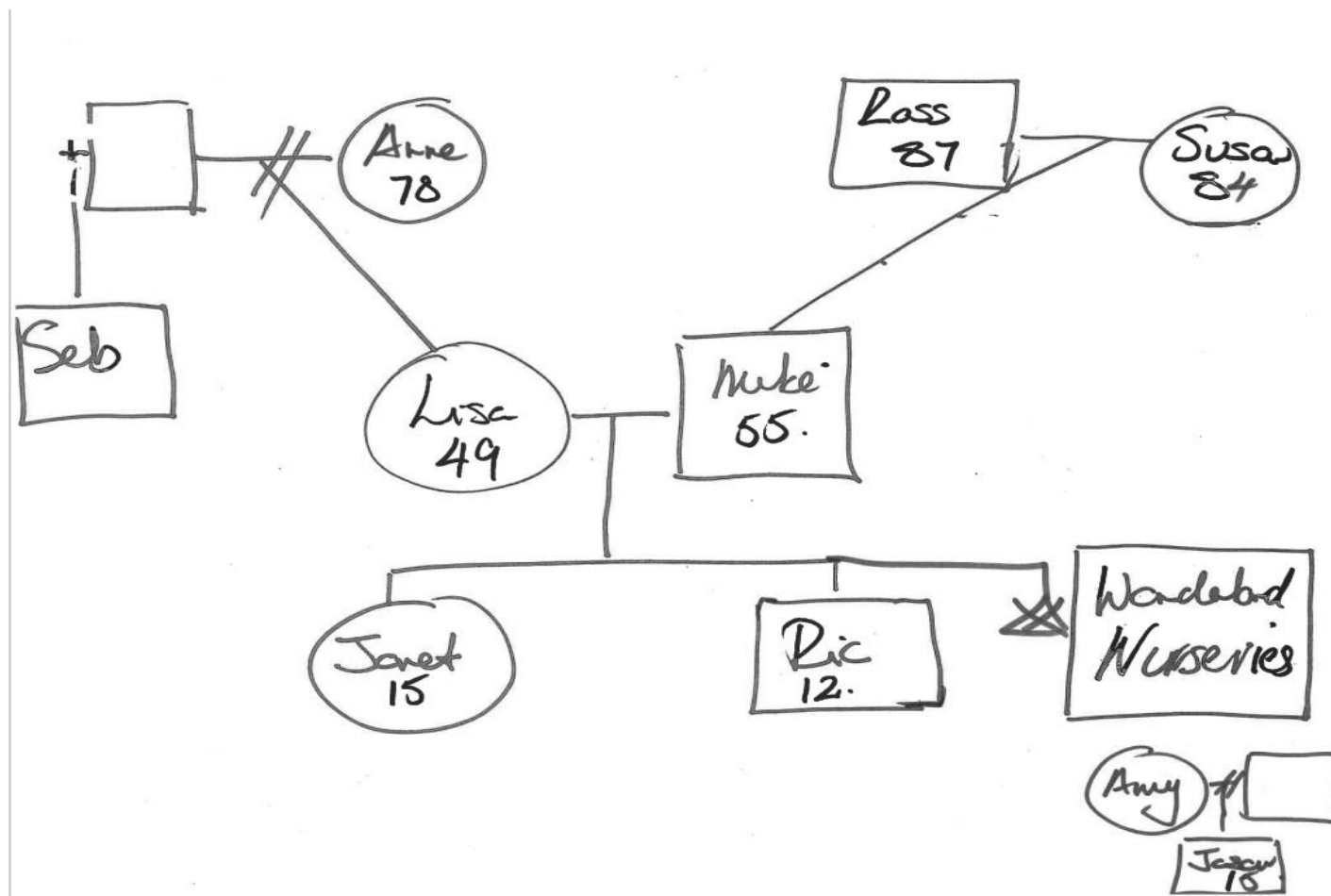
# The Stephens Family –Time 1



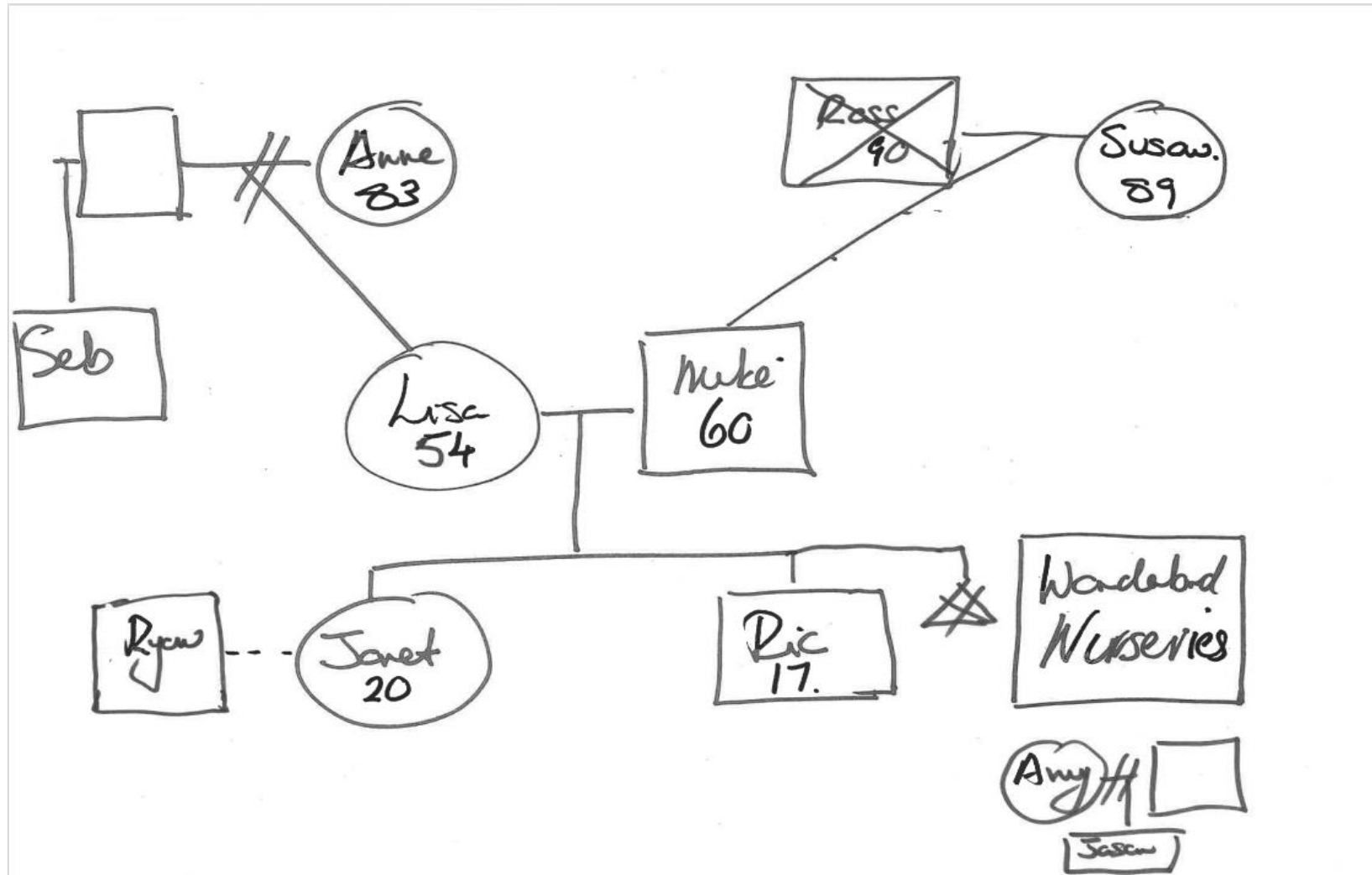
# The Stephens Family - Time 2



# The Stephens Family – Time 3

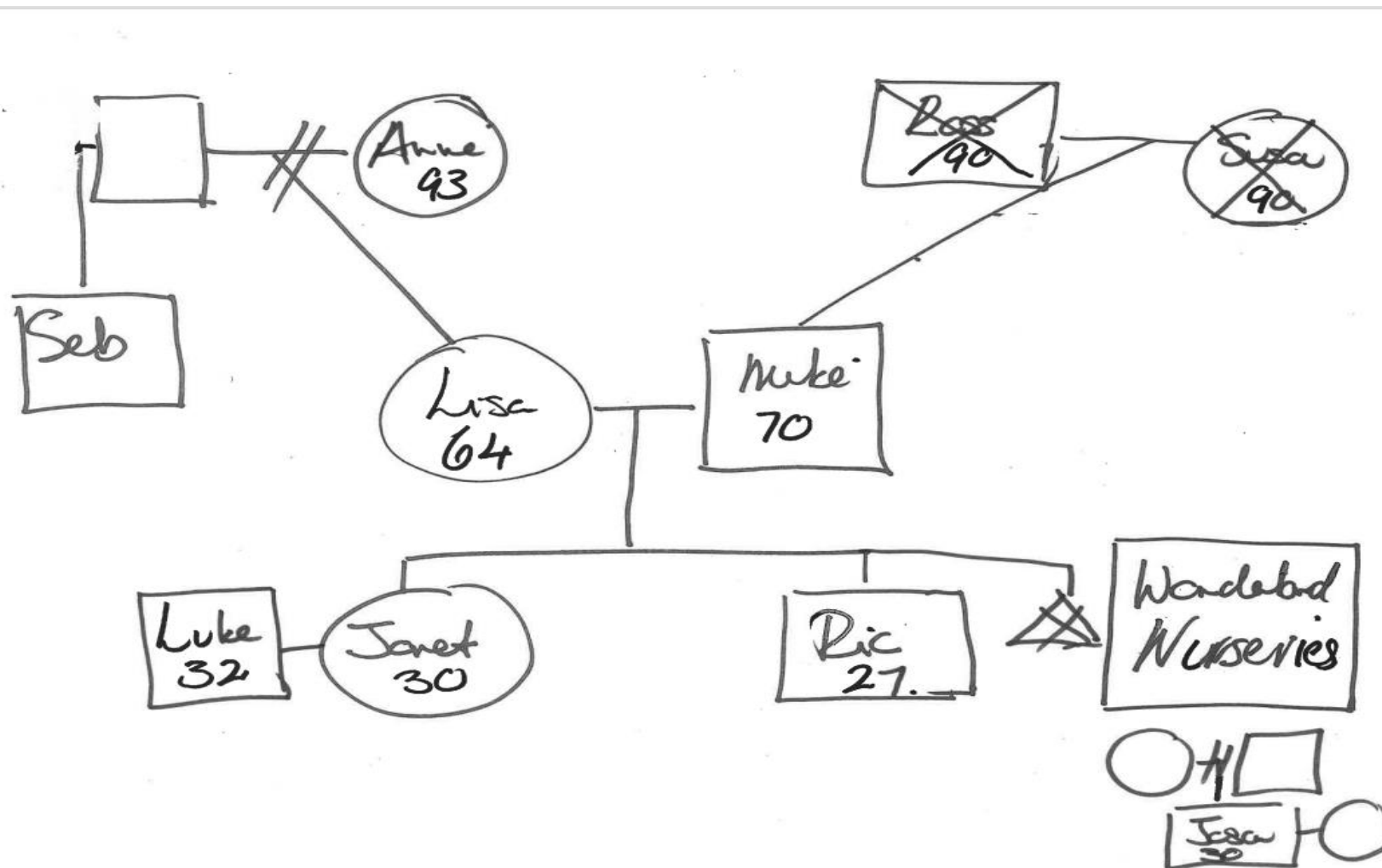


# The Stephens Family –Time 4





# The Stephens Family – Time 5



# Conclusion

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- Transition is normal and necessary
- Transitions are challenging and often uncomfortable
- Failure to make normal life transitions or adjust to unexpected events can result in symptoms and problems
- Good communication, clear roles and rules, and effective balance of authority and responsibility support transitions

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**Discussion.**

Any questions?

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**Thank you.**  
From the  
Bower Place team

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