



FAMILY  
BUSINESS  
ASSOCIATION



# Leading and Influencing Change in Family Business

Created by TalentCode HR

Presented By: Trudy MacDonald, Managing Director



# What to **Expect**

1. The Current State of the Workforce
2. Getting Everyone on the Same Page
3. Enhancing Productivity and Engagement  
(without burning people out)

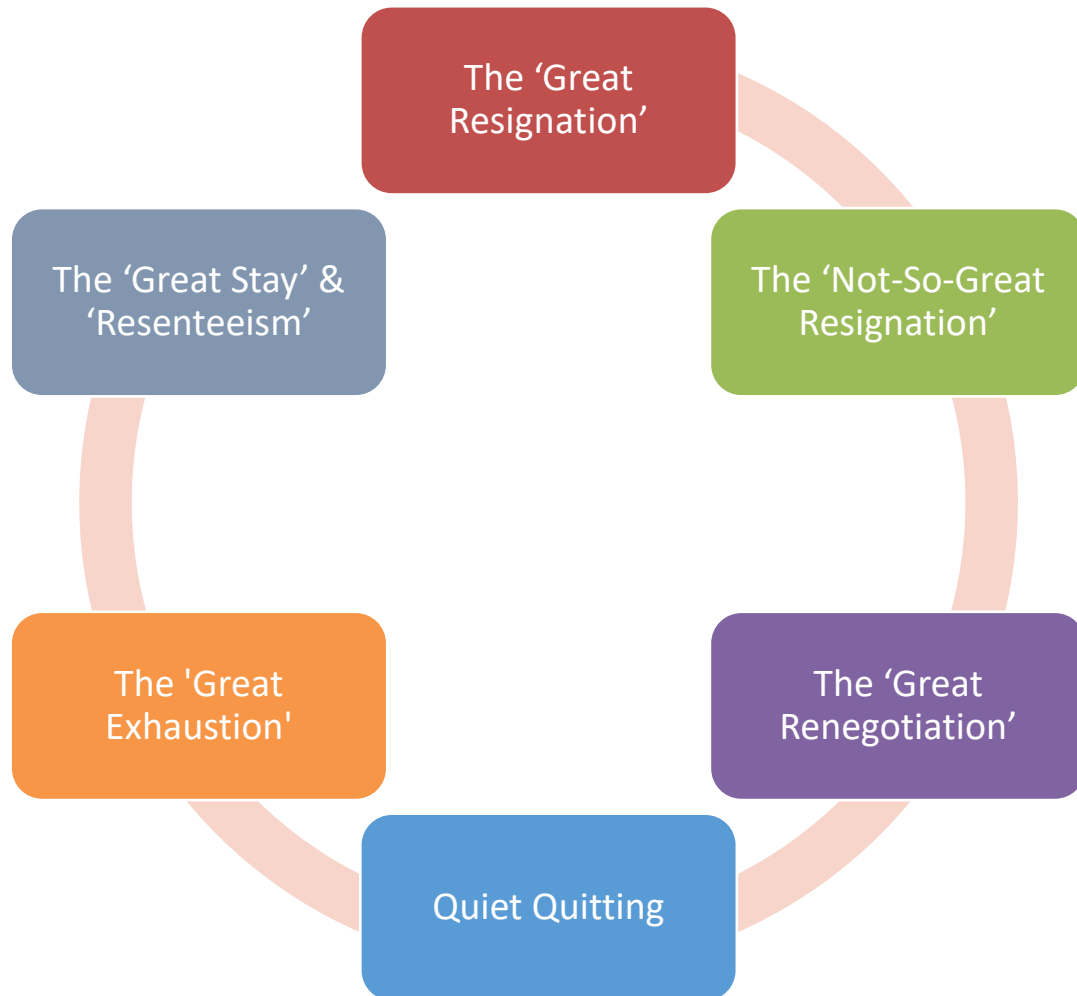
SECTION 1

# The Current State of the Workforce



# The Current State of the Talent Market

## Australian Talent Trends

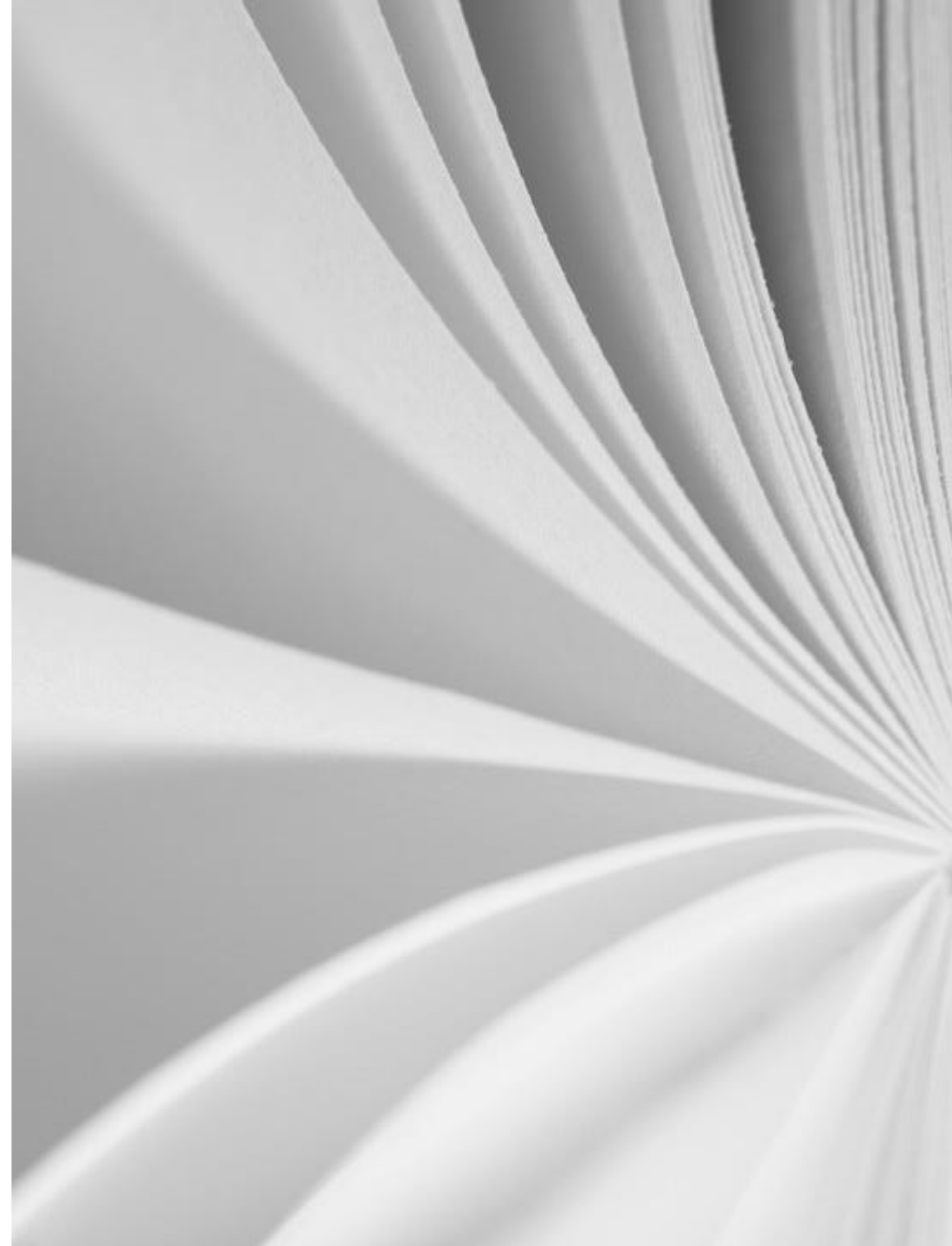


### Current Themes:

- A more humanistic approach to leadership
- Renewed focus on accountability and results
- Exhaustion and unsustainable workloads

SECTION 2

# Getting Everyone on the Same Page



# The Common Changes Family Business are Grappling with



Emerging  
technologies and AI



Wearing different  
hats (family,  
operations, board  
member, shareholder)



Role transitions



Succession planning



Legislative and  
industry changes



Changing business  
model

XYZ

Generational  
difference



The changing state of  
the workforce



Hybrid and remote  
working  
arrangements



Shifting customer and  
market demand

62%



of people don't like leaving their comfort zone





# Why do People Resist Change?



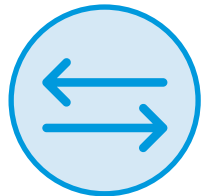
## Lack of Transparency

*"I don't understand the rationale for change"*



## Lack of Self Confidence

*"Will I be successful in the future?"*



## Lack of Stability

*"I am comfortable with the status quo and unsure what the future will bring"*

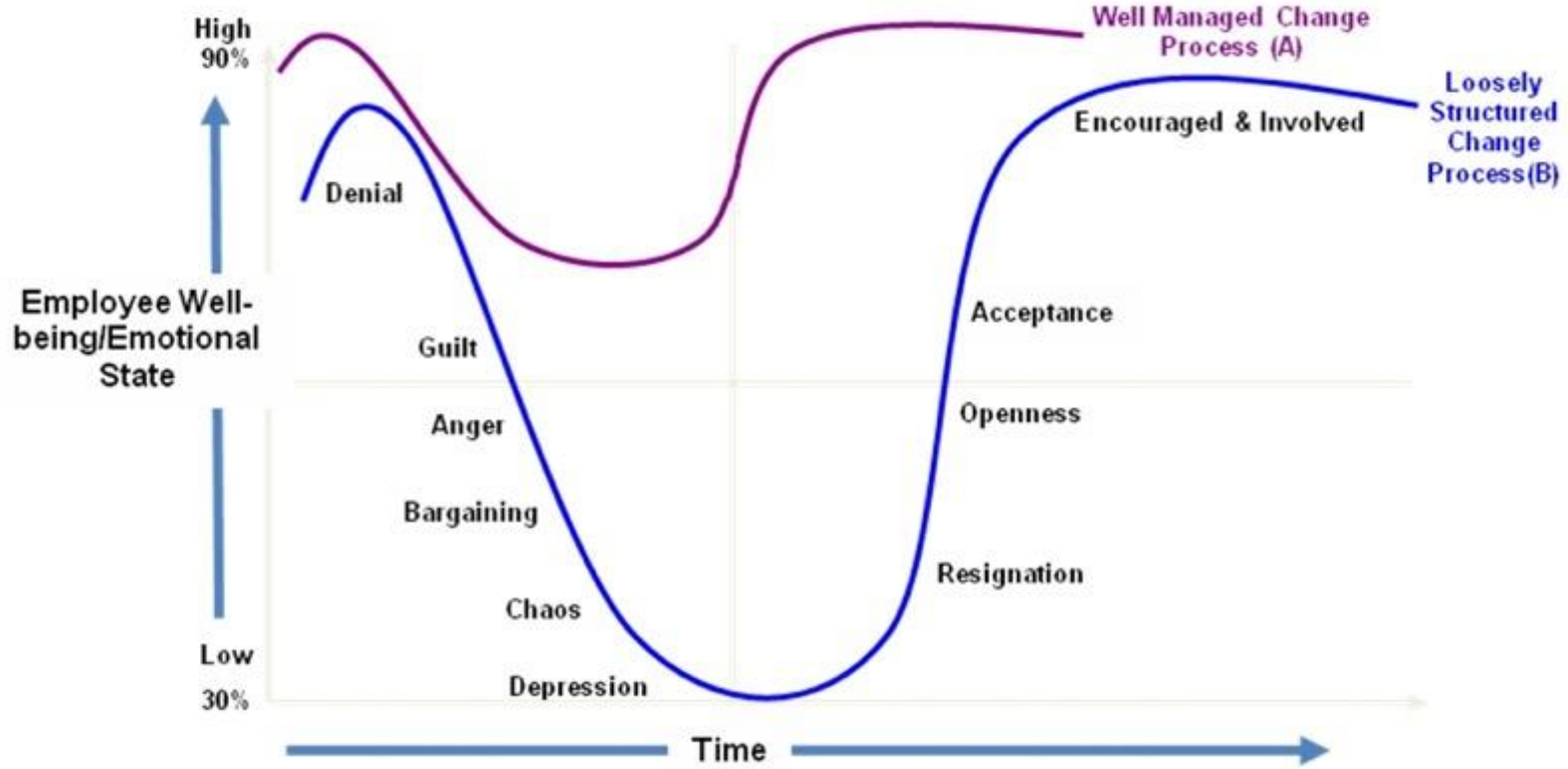


## Lack of Control

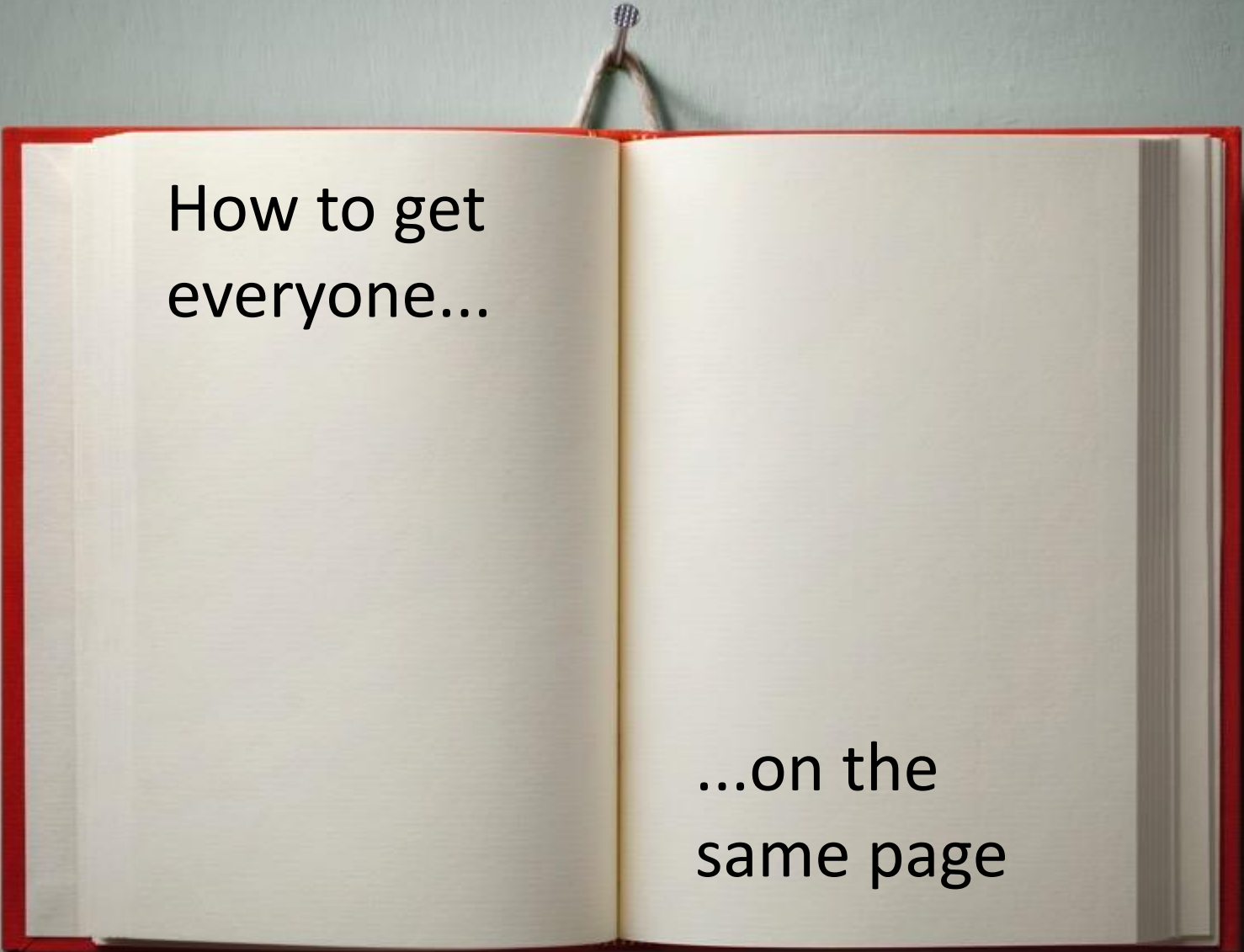
*"I feel that the change has been done to me and I am losing control / influence"*

We can influence all of these things as leaders and hence influence people's response to change.





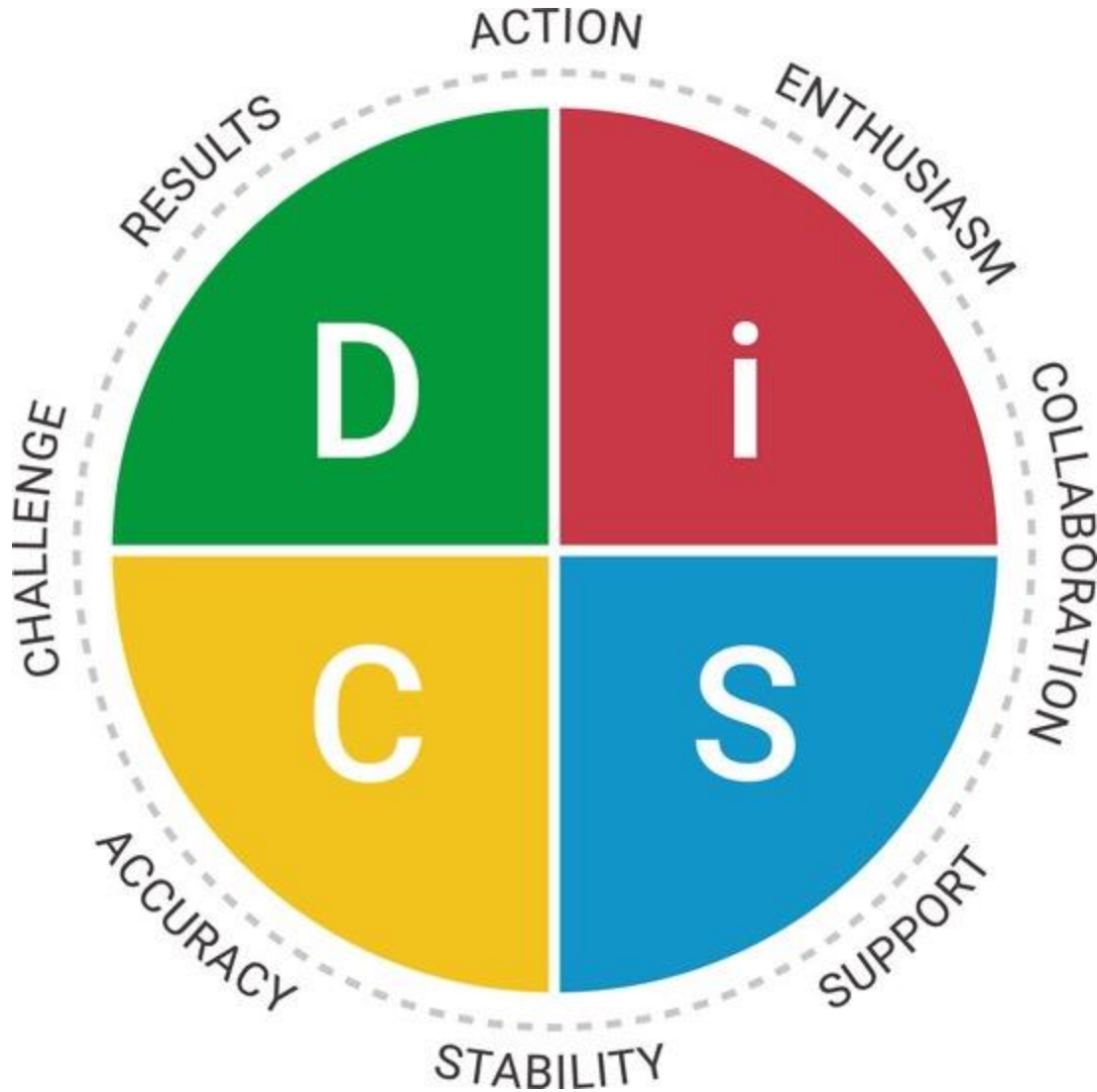
# The Typical Response to Change



How to get  
everyone...

...on the  
same page

# Tip 1: Understand the Communication Styles and Strengths of your Team



1. Create self awareness around the environment each person creates
2. Adapt our approach to communicating to get the best out of others
3. Build emotional intelligence as a foundation for productive conversations



# A **Model** for High Performance Teams

“The Five Dysfunctions of a Team” - Patrick Lencioni



# Tip 1: Respond, Don't React



## Observed Behaviour

A family member challenges your decision in front of others at a team meeting



## Interpretation (we tell ourselves a story)

The family member does not respect my position and wants to embarrass me in front of others



## Reaction

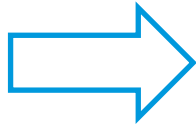
Defensive, direct.....not your best performance!

# Managing our Emotional Response to Change as Leaders



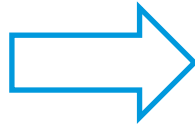
## Observed Behaviour

A family member challenges your decision in front of others at a team meeting



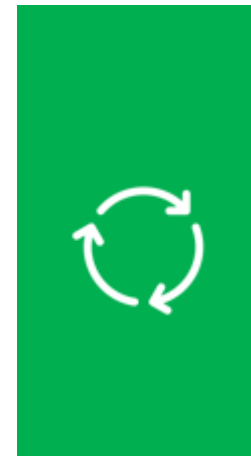
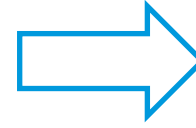
## Interpretation (we tell ourselves a story)

The family member does not respect my position and wants to embarrass me in front of others



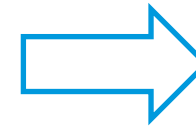
## Pause - Ask yourself: “What do I really want?”

I want to ensure the full team is behind this decision



## Reinterpretation (tell ourselves a different story)

The family member is voicing a genuine concern which will now give me the opportunity to get build trust and get everyone onboard



## Action

Thank you for tabling your concern, let's discuss as a team so we can hear everyone's concerns and align on how we can move forward.



# Tip 2: Engage in a Team Reset - Revisit our Ways of Working

## Role Clarity

Do we have role clarity and clear measures of success?

Where is there waste / inefficiencies?

## Accountability

How do we hold each other accountable?

How do we give and receive feedback?

## Meetings

Do our meetings have a clear purpose, agenda & outcomes?

Who attends our meetings? How long do they last?

## Decision Making

How can we promote dialogue and debate?

How do we make decisions?

# Case Study: Construction Industry

**The Family Business:** 2 Parents, 2 Children, 2 Children in Law + 60 employees

**The Challenge:** Transitioning from Dad as CEO to Son as CEO and the associated family dynamics

## Approach:

### 1. DISC Assessments and Communications Style Workshop

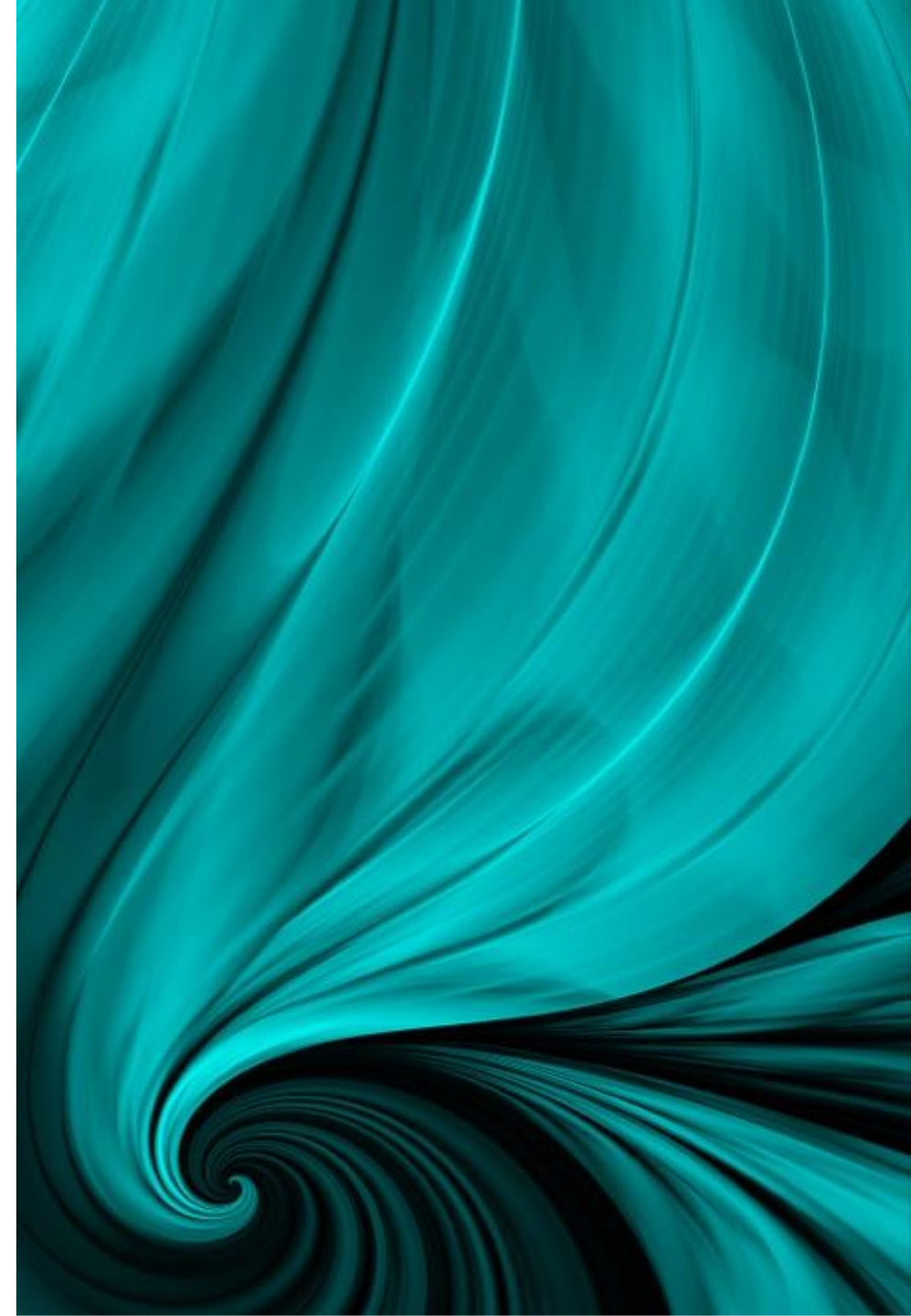
- Extend trust
- Self awareness
- Understand and celebrate strengths and diversity of styles
- “User manual of me”

### 2. Align on Ways of Working

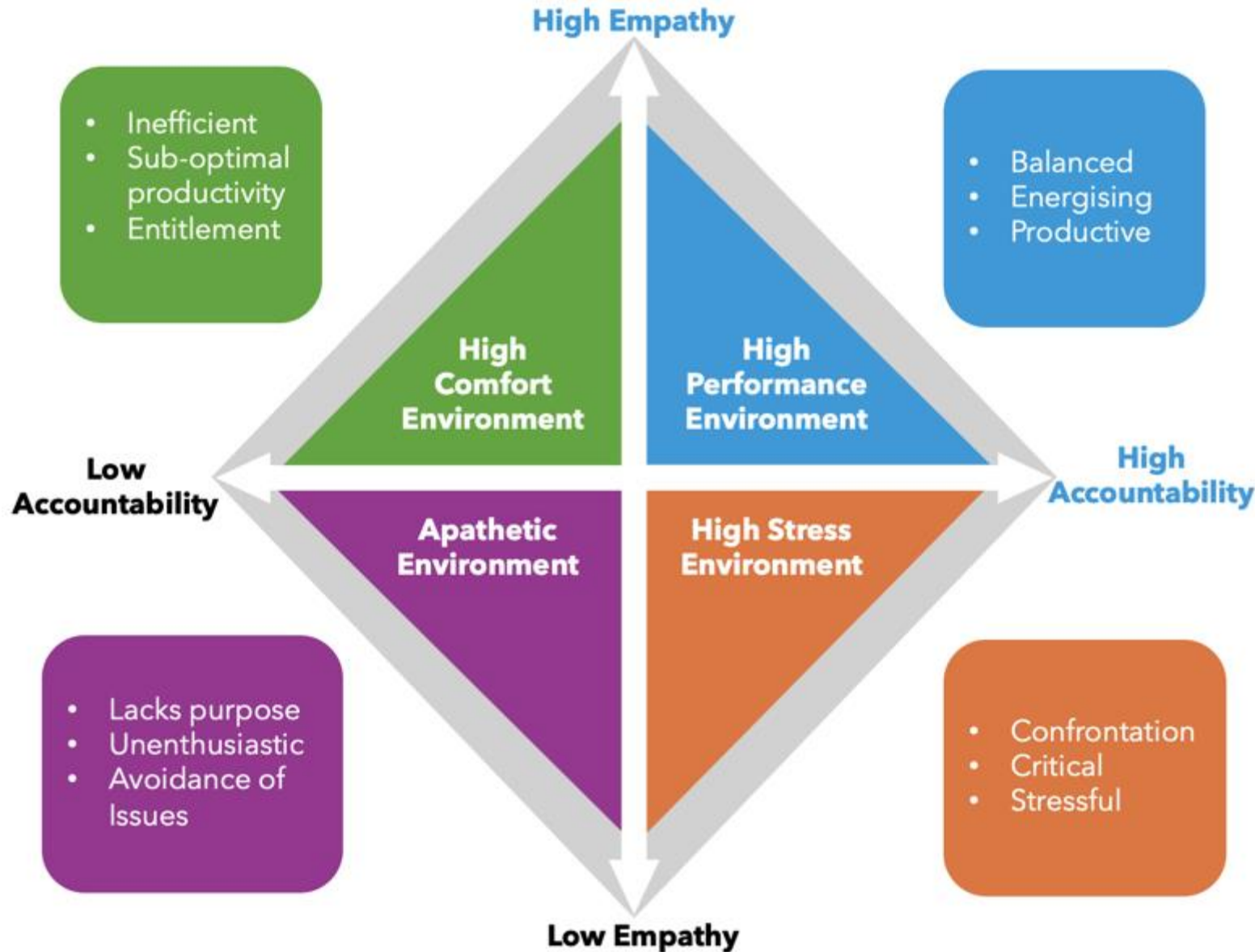
- Clear strategy and implementation plan
- Role clarity, measures of success & delegations of authority
- Behavioural charter & regular reflection
- Meeting purpose and agendas
- Training – giving & receiving feedback

SECTION 3

# Enhancing Productivity and Accountability Without Burnout



# Getting the Balance Right – Empathy & Accountability



Do your leaders and managers have the capabilities to balance empathy with accountability?

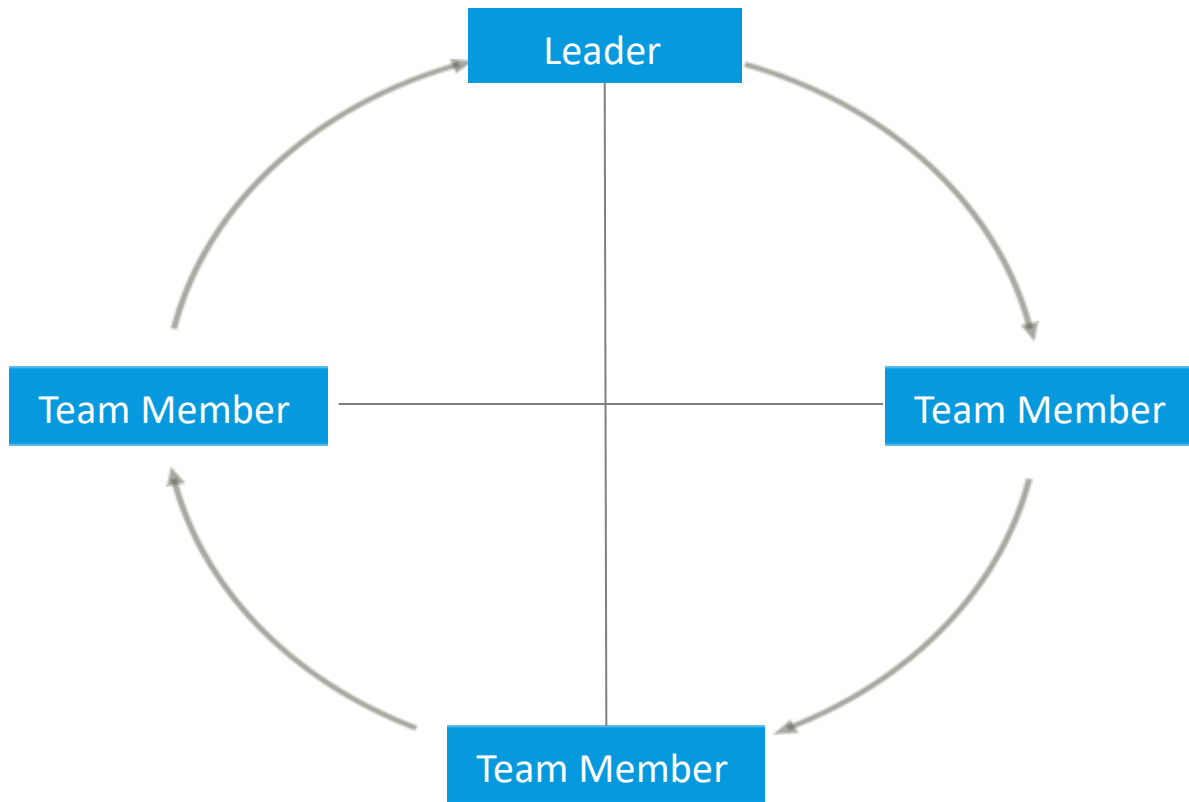
# Tip 1: Revisit Priorities

Great	Good	Poor	Missing
Adding future value to the business	Adding current value to the business	WOMBAT: Waste of Money, Bandwidth, and Time.	Critical work that has not been a focus or we don't have the skills / time to deliver.

1. What is missing that will be critical to the success of our business?
2. What can I stop doing to create space for our priorities?
3. What can I double down on to have an even bigger impact?

# Tip 2: Make Accountability a Team Sport

Think “One Team”



## Level 1: Transparency

- I know what it means to be great in my role

## Level 2: Transparency

- We all know what great looks like for each other

## Level 3: Transparency

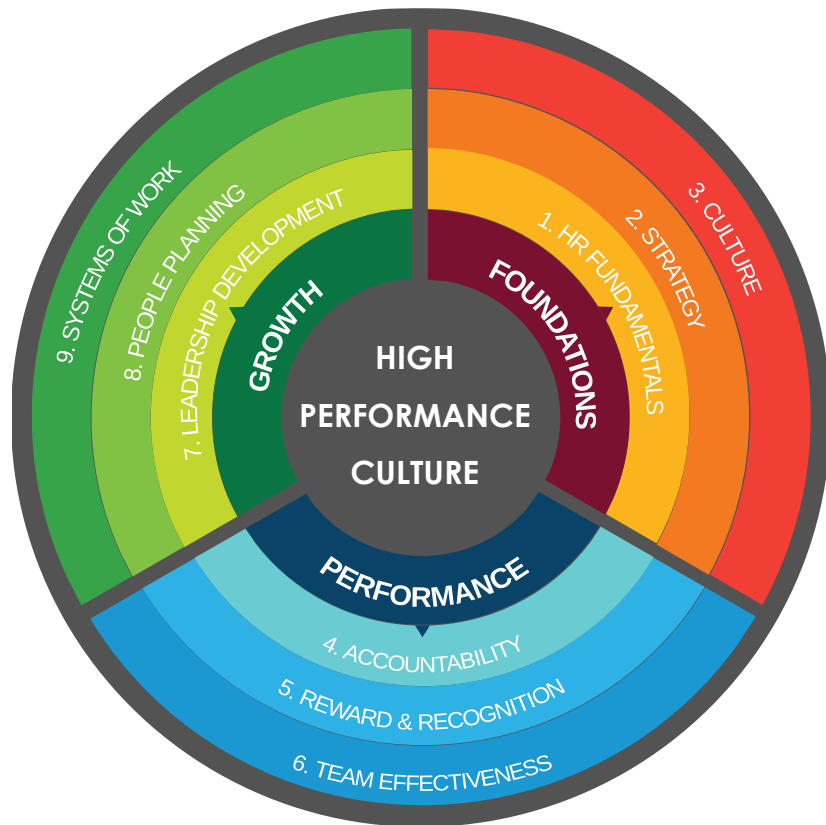
- I know how I am performing

## Level 4: Psychological Safety

- I know how my family members /team is performing
- We are vulnerable and discuss our progress
- We ask for support and share our mistakes
- We provide feedback & challenge
- We support each other and play to each others' strengths
- We celebrate as a team



# HIGH PERFORMANCE MODEL



FOUNDATIONS		
HR Fundamentals	Strategy	Culture
HR Compliance & Best Practice Reviews	Business Strategy	Employer of Choice
HR Policies & Employee Handbooks	People & Culture Strategy	Engagement & Culture Surveys
HR Advice, Coaching & Support	Strategy Implementation	Values & Behaviours
PERFORMANCE		
Accountability	Reward & Recognition	Team Effectiveness
Role clarity & Measures of Success	Salary Benchmarking	Psychological Safety & Trust
Performance Reviews & Accountability Conversations	Incentive Schemes	High Performance Teams
Competency and Capability Models	Recognition Programs	Recruitment Practices & Psychometric Testing
GROWTH		
Leadership Development	People Planning	Sustainability
Leadership Development Programs	Workforce Planning	Employee Value Proposition
Leadership Coaching	Organisational Structure and Redesign	Retention Programs
Leadership Assessments & 360 Feedback	Succession Planning & Talent Identification	Board Effectiveness

# Stay Connected with Us




@TRUDYMACDONALDLEADERSHIP



@trudy-macdonald-tchr



 [www.talentcodehr.com.au](http://www.talentcodehr.com.au)

 1300 559 585

 [talentcodehr@talentcodehr.com.au](mailto:talentcodehr@talentcodehr.com.au)

Trudy MacDonald

Managing Director and Founder

TalentCode HR

[trudy.macdonald@talentcodehr.com.au](mailto:trudy.macdonald@talentcodehr.com.au)

0410 465623