

The Short Guide to Developing a Family Business Mentoring/Coaching Program

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I. Establish the Mentoring/Coaching Development Team

1. Determine membership (Mentee + Mentor + Sr. Mgr. + Owners)
2. Determine primary Mentor/Coaching leaders (Non Family Mgmt. Member + Mentor/Coach + Development Team)
3. Outline Coaching Goals & Timelines for Family Member Mentee
 - a. Management (general, projects, personnel etc)
 - b. Finance
 - c. Operations
 - d. Sales/Marketing
4. Outline specific experiential activities for Family Mentee
 - a. Programs to attend
 - b. Individual Coaching contacts
 - c. Evaluation instruments

II. Conduct Formal Assessment for Baseline Coaching Information

1. Myers Briggs
2. 16 PF or California Personality Inventory (CPI)
3. Gardner Multiple Intelligence Test
4. Emotional Intelligence Survey
5. Leadership Practices Inventory (LPI)
6. Recent Performance Evaluation from supervisor(s)

III. 360° Interviews

1. 2 Hour meeting with Mentee/Candidate]
2. Meeting with:

- a. His/her direct superior
 - b. A peer
 - c. Two supervisees of family member
 - d. Meeting with appropriate family members
3. Compilation of interview and assessment information

IV. Report to Mentoring Development Team & Mentee/Family Member

1. Full Report to Mentoring Development Team
2. Full Report to Family Member
3. Meet with Mentee again within 7 days (for them to digest and clarify as needed)
4. Prescriptive recommendations, sequencing of experiences (both training and job responsibilities), and competency measures and operationalized goals for success are outlined.

V. Monitoring of Program

1. Mentoring Development Team meets (with Mentee and Mentor) Quarterly to assess progress and make any adjustment to program
2. Satisfactory performance is rewarded with progress in the program sequence. Likewise, unsatisfactory performance requires candidate to remain at level. Two quarters that show insufficient progress or performance keeps the candidate at that level and may remove them from the Development Program.