

THE FAMILY ENTERPRISE
INITIATIVE SERIES

THE LEADERSHIP FIELD GUIDE



Essential Wisdom and Decision-Making
Principles for Family Business Leaders

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The Leadership Field Guide

To Family Business Leaders and Your Successors and Colleagues

This Field Guide has been inspired by what our Family called my Father's "Words of Wisdom" (developed from his many years as a Family Business Leader, and from what he learned and passed on from his Father). Every enduring Family Business and Family Enterprise is built not only on financial capital, but on the character, clarity, and conduct of its Leaders. Over the generations, Leadership Words of Wisdom are often passed along quietly -through stories, decisions, examples, and brief words of counsel spoken at the right moment.

I've tried to express in my words as best as I can these Words of Wisdom I've received and now pass on. I've learned these from hundreds of Family Business Leaders and from our work with some great Leadership Development organizations, such as:

Vistage International	Maxwell Leadership
Business Enterprise Institute	Strategyzer
Family Firm Institute	James Malinchak International
Family Business Advisors Alliance	Secret Knock

Each short example reflects a Mindset - a way of thinking, acting, and decision-making that has guided Family Business and Family Enterprise Leaders toward sound judgment, enduring purpose, and meaningful results. Together, they form a compact manual of Leadership - one that blends practical insight with values-based discernment.

These insights are intentionally concise. Each is meant to prompt reflection and conversation, not to close it. Read one in the morning before your day begins. Share one at a Family or Leadership meeting. Use them to guide mentorship discussions with the next generation of Leaders in your Business or Family. Over time, you'll find that they become part of your own Leadership language - simple phrases that surface at key decision points.

This Guide is designed for intergenerational use. Seasoned Leaders can use it to articulate the principles that shaped their own decision-making. Emerging Leaders can use it to form their Leadership foundation and internal compass. All generations together can use it to align around a shared understanding of what Leadership looks like in your Family Business and Family Enterprise.

Every Family Business and Family Enterprise eventually faces the question: *How do we preserve what matters while adapting to what's next?* The answer lies not in a single plan or policy, but in several specific ways of thinking and leading that are grounded in Faith, Family, and Purpose. These Leadership insights offer a starting point and a continuous guide for that journey.

May this Guide serve as a companion on your path - helping you think more clearly, act more wisely, and lead more courageously as you build and sustain a Family Business and a Family Enterprise worthy of your Family's name. And may this Guide serve as a bit of inspiration to continue on the paths we all need to take to become better leaders.



Purpose and Vision: Building What Lasts

--The leader's first duty is to know why they lead and what they are building.

Breaking Rocks, Earning A Wage Or Building A Cathedral? Start by knowing what business (or profession or vocation) you are really in.

Build It. Be dedicated to building an enduring business (or profession or vocation or family), not just working a job so you can one day retire.

"Fourth Quarter" First. Begin all thinking "with the end in mind".

See It. Have the passion and purpose to imagine a better, different future.

Growth. Decide if your business (or your plan) is a golf ball with plans to become a baseball, softball, soccer ball and basketball or just to stay a golf ball.

Telescope It. You can't build or invest in a future for anyone if you can't see past today. Always be looking into the future to anticipate the ripple impact of future possibilities.

The Lighthouse Effect. Determine the probable, almost certain, future outcome of your present course if left unchanged. Then find what's missing, the presence of which will produce a substantially better outcome. Then promptly deploy what's needed.

Get Ready, Get Set, Go! Keep building your "Talent Stack".

Your Choice. The future you want won't happen on its own. Cause what you want or accept what others create for you.

Left/Right and Ahead. Compete against your vision of the future, not just against your competition.

The Formula. Business Model Command + Dynamic Leadership Core + Root Force Culture = Lasting Business Success.



Strategy and Decision-Making: Thinking Clearly, Acting Decisively

--Clarity, creativity, and courage drive wins.

Step Back. Always step back away from the detail to make sure you are catching the big picture, the big issues and the big opportunities.

Circle of Options. Your options are not limited to the two points at the ends of a line, but instead extend to every point on a circle that connects those two points.

Always Three. There are always three possible scenarios. Left end of the spectrum. Right end of the spectrum. Or somewhere in between. Anticipate and think accordingly.

Choice? If someone demands you must choose one or the other, choose both, neither or something else.

Course Correction. Be quick to fully recognize when the situation has changed.

Plans. Recognize that all plans should be firm . . . until changed.

Perspective Reset. Know when (and how) you need to reset your or the other person's perspective.

"Kobayashi Maru". You can win only if you first figure out what it takes to win. If you need to change the rules or situation or setting or premise or scope or players to win, then figure out the fastest way and do it (as long as your change is in all ways legal, ethical and moral).

Sanity Check. Make sure you have a capable someone to sanity-check your "great" ideas.



Innovation and Opportunity: Seeing What Others Miss

--Innovation is courageous, disciplined curiosity.

Strike Zone. Anyone can hit the pitches in the strike zone. Take some chances on some tough ones outside the zone.

Opportunity. Recognize opportunity. Seize it quickly. Before it vanishes into the night.

Spider Web It. Seek every opportunity from each venture BDA (Before, During and After) the venture.

Create Options. Plant a lot of seeds. Fertilize. Water. Nurture. Harvest. Plant more.

Direction. Snapshots are good. But your best friend is seeing the opportunities and threats nestled in trends.

What If? Think and explore the possibilities within the opposite.

Want To Be Innovative? Forever question and examine yourself and the world around you with curiosity, confidence and courage.

Trenches. Look to your Front Line Colleagues for truly valuable insight.

Be Childlike. Recapture that childlike creativity which society and the education system have conditioned out of you.

Unlearn. Face the need to unlearn much of what you learned that just isn't so (or is no longer so).

Bigger. Bigger. Make the "unsolvable" little problem bigger to start to see the outline of the solution.

The Button. If God gives you a button, sew a great suit on it.

Disruption. Massive disruption is now an ongoing reality in every business (and life) sector. The only question is whether you will help cause it or be a "victim" of it.

Really Great Leadership. Don't blindly dictate decisions. Drill down to first understand what others already see or are asking of you.



The Leadership Field Guide:

This Guide is an essential part of the Leadership Development Blueprint of your Family Enterprise



Execution and Results: Turning Vision into Momentum

--Leadership means finishing things that matter.

- Quickness.** Always find the quickest way to the cash (or the result you are seeking).
- Focus.** Only begin everything that should be started now (taking the simplest route possible).
- Balance.** Don't just sit there managing the business (or profession or vocation or life) you've got. Go eliminate something you shouldn't be doing anymore. And create something new you should start doing.
- Simplify.** Start with simple. Only add what's needed.
- Great Enough.** Don't let a fruitless quest for perfection delay getting the great done now. (AKA: Go for great. Don't wait for perfect).
- Determination.** You want to be successful? Show up. Keep showing up. No matter what! Get up every day and push forward.
- Stop The Rocking Chair.** Actually get somewhere by converting worries into your next fun challenge.
- Galaxy Quest.** "Never give up. Never surrender." Get back on the horse. Adapt as appropriate, but don't wimp out or concede to mere pushback.
- Second Chances.** Fumbles are inevitable. The ability to recover is priceless. Never ever give up.
- Bring It.** Relish, learn from and take on the competition through focus, commitment, persistence and sheer will. Let your passionate, positive optimism be contagious.
- "Hold Your Horses".** Know when to deploy the "Tenth Man Rule".



Leadership Presence and Integrity: Leading from the Inside Out

--Your example is your loudest message.

- Own It.** Think and act like you are the business owner and CEO (or the leader), even if you aren't (yet).
- Responsibility.** Empower your team (or family or colleagues). Hold everyone highly accountable. Blame yourself first and credit others first.
- Double Check.** If you wouldn't be happy seeing your action on the front page headline, don't do it.
- Wisdom Always.** Proactively deploy great judgment and wisdom. Always.
- Truth.** Radically embrace every aspect of transparent truth.
- The Minds Shortcuts.** Understand "The Cognitive Bias Codex".
- Dignity.** No matter what, never, ever, take away a person's dignity.
- Presence.** Your demeanor impacts trust, respect and influence. Be self-aware.
- Body Language.** Learn the importance of the signals you send.
- Prudent Silence.** Protect your wins from envy, jealousy and negativity.
- Attitude.** Why not us (or me). Why not right now. Hurry!
- Initiative.** Search for what needs to be done. And do it.



Communication and Influence: The Art of Connection

--Influence is earned by empathy and persuasion.

- The Power of Questions.** The quality of the questions is more important than the answers you think you already have. The right questions are the power tools of innovation and solution.
- The Means of Persuasion.** To be a persuasive leader, communicate with credibility (ethos), logic (logos) and emotion (pathos). Understand the principles of take away and reciprocity, the impact of your heartfelt attitude and the power of the analogy.
- Boston Legal.** Express at least three separate winning reasons for your proposition, each stronger than the previous. If you don't have three winning reasons, why are you pushing it.
- Think and Show.** Overcome your so-called left or right brain dominance and learn to think and express logically, laterally and visually. Put the dots on the page. Connect the dots.
- Confusion.** A confused mind won't buy or agree. Be extremely clear about what you are offering and why.
- Capture The Essence.** Don't expect the person you are serving to try to decipher what you mean. Make your point immediately easy and clear.
- Other Person's Perspective.** Perceive everything from the perspective of the other person. Listen. Ask. Listen. Repeat.

In Shoes. Put yourself in the shoes of the person you are serving. If you were that person, would you do what you are recommending. If not, don't recommend it.

Know Who Is To Complain. Check the reality and scope of your proposed course of action based on who could complain about, be harmed by or challenge the decision, transaction, outcome or solution.

Catching An Unwilling Horse. Approach the nearby friendly horse. Then reach over to catch the unwilling one. Sometimes the indirect approach works best.



Collaboration and Team Dynamics: Building Trust and Unity

--Leaders multiply trust, humility, and purpose.

Sandbox. Play well together in the sandbox. Be collaborative, give praise to others, remember who gave you that great idea and be appreciative towards those who help you.

Loyalty. Earn and reward loyalty, and make loyalty so incredibly easy that your customers (or family or others close to you) and team don't even think of switching.

Leave No Grudge. The persons you did the job for will be satisfied if you have been diligently pressing their cause with a heartfelt sense of urgency.

Resolving Conflicts. Get the adversary attitude out of it.

They Just "Don't Understand". Figure out how to help them understand. And admit your part in causing the confusion.

Sandwich. Wrap critique in praise.

Mistakes and Wins. Share both your mistakes and wins so you and your team (and family or colleagues) can learn from them.

Uplift. Always aim to uplift those you interact with.

Heart and Soul. Listen and learn from the passion which fuels the heart and soul of the great business (and personal) pioneers you should be working with.

Family. Know who your real extended family is. Protect them.



Resilience and Risk: Staying Grounded When Tested

--Steady, prudent courage keeps you in the game.

Risky Business. Don't "take" risks. Manage and profit from risks. Protect what you're building.

Meet It Head On. The unexpected will happen to you – you just don't know when. Ensure that your business and family have access to enough contingency cash (and resources) to overcome your unexpecteds.

Quicksand. If you are getting in over your head, stay calm, pray and reach for a stable person.

Profession. Activate the unique mindset analytics of the profession you are in.

So Many "Opportunities". Just because you could take it on, doesn't always mean you should.

Careful Out There. Know how to pick your spots. Don't sow harmful discord or start any unnecessary fights.

Heads/Tails. Find the win in each outcome.

Root Causes? Deploy "The 5 Why's" to identify the underlying cause.

Optimism. Be the optimist, but beware of "optimism bias".

Victory. Know when to declare victory and move on.



Faith, Values, and Legacy: Leading with Heart and Humility

--Leadership begins with character and faith.

Value. Always give more than you receive.

Know What Matters. Protect your Faith, Family, Friends and Future.

The \$10,000 Steinmetz Chalk Mark. Don't count nickels. Appreciate the incredible value, insights and wisdom your experienced Trusted Advisors bring to you and your colleagues.

A Heart, Two Ears and a Mouth. Empathy first. Then listen, discuss and resolve.

Passion. Passion is important. But a bad idea you are passionate about is still a bad idea (or the seed of a good idea).

Get The Key. Unlock the transformative Leadership Development strength from these Root Force Virtues: Tenacity, Respect, Trust, Courage, Generosity, Compassion and Enthusiasm.

Self-Start. Act as if all depends on you. Pray as if all depends on God. And be grateful for every moment of success He brings you.

Whose Side. Don't ask if God is on your side. Ask if you are on God's side.

FAMILY BUSINESS LEADERS

Results Not Wanted



Results Wanted



Results Achieved By



What Is The Financial + Personal Cost of Being Too Late or Out of Time?

What Is The Financial + Personal Value of Each Great Play Deployed In Time?

Inspired By Excellence. Committed To Your Success.

When we work with Family Business Leaders, we ask about your story and the story of your Family Business. We get to see the heart and soul of America's Family entrepreneurs, that is, America's new breed of Family Business Pioneers.

We get to see your passion and your excellence. We get to see the grit and determination which drive you. We get to see the love and respect you have for your colleagues and for those you serve. In short, we get to see the pioneer spirit which drives you and your team. Just as it has driven me and our team.

For over 60 years we have been working with our nation's food companies, restaurants, farmers and ranchers to feed people better. We have been working with contractors and companies to build better and more affordable homes and new business facilities.

We have been working with technology companies to develop new ideas that improve lives. We have been working with inventors, startup companies and health care providers to develop patented medical devices, leadership teams and joint ventures that save lives. We have been working with energy companies to help fuel our homes and the businesses we all rely on.

We have been working with bankers, key partners, manufacturers,

distributors, retailers and transportation companies to finance, produce and deliver better products and services to communities around the world. We have been working with Family Business Pioneers and their other Trusted Advisors to transform, grow, carry on and transition the Family Business Dream, the backbone of our great country.

We have been working with our community leaders to improve our cities and our schools. We have been working with our elected leaders to improve the business climate to create and attract new and better jobs for Families.

For over 60 years, this has been the McGrath North Law Firm.

Working quietly behind the scenes closely with the talented leaders of great organizations around the world to make lives better.

Working together. Working stronger. Working faster. Working better. Overcoming Roadblocks. Avoiding Train Wrecks.

Inspired by Excellence. Committed to your Success.

Our diverse team isn't waiting for the future. We are helping to produce new, incredible, sustainable results right now.

We invite you to join us as we move quickly ahead towards the next 60 years.



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Membership Experience with:
Vistage International Family Business Network
Family Business Advisors Alliance
Family Firm Institute
CEO Space International
Business Enterprise Institute
Exit Planning Institute
Maxwell Leadership
Strategyzer AG
Secret Knock

Our Vision (Ultimate Goal)

That every Family and Family Business we serve will build a lasting Family Enterprise of generational wealth, leadership, and legacy.

Our Culture & Code of Conduct

- Tenacity—We never give up on Families.
- Respect—We honor both tradition and innovation.
- Trust— We earn and safeguard trust in every relationship.
- Enthusiasm—We bring energy and optimism to every challenge.
- Courage—We face difficult issues with clarity and resolve.
- Generosity—We offer our best ideas and efforts.
- Compassion—We remember that Family is always at the heart.

Our Mission (Why, What and How)

We "look into the future" with Family Business Leaders and your Trusted Advisors to discover, decide and deploy what's missing and still needed for you, your family, and your colleagues to achieve the full greatness of the Family Business Dream.

Our Mission Mindset

- "Begin with the end in mind."
- "Start with simple. Only add what's needed."
- "Go for great. Don't wait for perfect."
- "All plans are firm...until changed."

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