



DATES

May 19, 2020
Tuesday
2:00 pm - 6:00 pm

PROGRAM FEES

Php 5,400 per session Single Session
Php 4,860 per session For 2 Sessions Only
Php 4,590 per session For 3 - 4 Sessions

HOW TO REGISTER Online

www.cce.ateneo.edu

Email

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Call

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*Schedules and prices may
change without prior notice.*

Family Factor and Succession Planning in Family Businesses

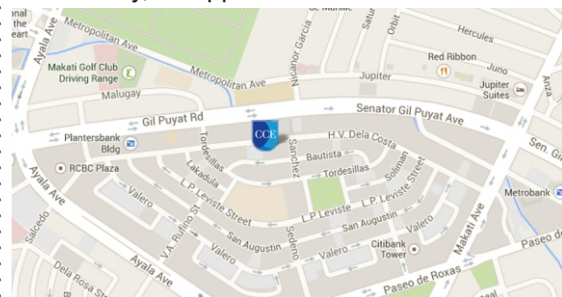
**From Setting Up to Stepping Up: A Family Business
Management Series**

Package inclusions:

- Program fee
- Training kit
- PM snacks
- Dinner
- Certificate of Attendance

Venue:

Ateneo de Manila University - Salcedo Campus
3/F Ateneo Professional Schools Bldg.,
130 H.V. Dela Costa St., Salcedo Village,
Makati City, Philippines



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ATENEO DE MANILA UNIVERSITY
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CCE CENTER FOR CONTINUING EDUCATION

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ATENEO FAMILY BUSINESS DEVELOPMENT CENTER



PRESENT THE

FROM SETTING UP TO STEPPING UP: A FAMILY BUSINESS MANAGEMENT SERIES

FAMILY FACTOR AND SUCCESSION PLANNING IN FAMILY BUSINESSES

May 19, 2020

Family Factor and Succession Planning in Family Businesses is designed to give the participants an overview of how the family should understand the dynamics that affect its members especially the older generation in relation to the younger generation. “Succession Planning” or “Leadership Transition” is and what it means for the continued success of the Family Business.

Family Factor and Succession Planning in Family Businesses

From Setting Up to Stepping Up: A Family Business Management Series

Part 1

Understand the “family factor” in a family business succession process. Know the people who are involved and are affected in the process. Recognize the common individual and relational struggles that make the transition difficult. Learn effective ways of managing the family dynamics and addressing individual and relationship challenges that come during this very crucial period in a life of a business family.

Part 2

A study by the University of Connecticut Family Business off 800 family businesses said that the ultimate collapse of firms was precipitated by the founder's death or incapacity in 47.7% of businesses. That compelling statistic surely affirms the importance of Succession Planning.

The actual physical “Changing of the Guards” is an event, but the Succession Planning that should precipitate that should be a process consciously engaged in by the family so that the actual event is not an imposition but a result.

Succession Planning is a professional, rational and perpetual process in any successful business enterprise. How come when applied to Family Business where the contenders are family members, the process loses professionalism and rationality? Worse, it is put in the back burner not addressed at all.

The participants should put all relevant succession issues in a structured format and address potentially emotional issues in professional framework so that these issues can be addressed effectively and enable the family to formulate guidelines for the smooth generational transition and leadership – identification of the potential successors, leadership training, etc.

resource persons

MR RICARDO H. MERCADO is the Director of the Ateneo Family Business Development Center of the Ateneo de Manila University (ADMU) - John Gokongwei School of Management (JGSOM). He is also a resource speaker on family business seminars in Santa Clara University; University of the Pacific Stockton; and University of San Diego, USA.

Mr. Mercado earned his Bachelor's degree in Economics and Master's degree in Business Administration from ADMU. He also has a Professional Diploma in Family Ministry and Counselling from the Center of Family Ministries of ADMU. He is a Certified Franchise Executive of International Franchise Association (IFA), Washington DC, USA, which was sponsored by Marriott International Scholarship for Minorities and IFA Education Foundation.

MS. MARIJO M. CARONONGAN has over 20 years of experience in Human Resource Management and Organizational Development.

She is currently a Lecturer at the John Gokongwei School of Management of the Ateneo de Manila University and Consultant & Human Resource Cluster Head of the Ateneo Family Business Development Center (AFBDC). As Consultant of AFBDC, she has been engaged by owners of family-owned corporations to assist them in professionalizing their business operations. As part of her engagement with AFBDC's clients, she designs and implements HR/OD interventions, such as, Performance Management System, Job Evaluation, Succession Planning, and Policy on Employment and Management of Family Members.

She graduated with a degree of Business Management at the Ateneo de Manila University and took her graduate studies at the Ateneo Graduate School of Business.

objectives

After this program, you will be able to:

1. Develop an understanding of the complexities that exist in the succession planning process;
2. Develop an in-depth understanding of succession planning, generational and leadership transition in a family business setting;
3. Gain insights into the concept of ownership with management and the concept of ownership without management; and
4. Appreciate the benefits of planning for succession in the long term survival of the family business.

program content

- I. The meaning of succession planning or leadership transition
- II. Family dynamics that affect succession process
- III. Family member's role/s and responsibilities in the succession planning process
- IV. The other stakeholders: the non-family member professionals
- V. Guidelines in training and mentoring the younger generation
- VI. Tools used in identifying and developing successors

who should attend



Business family owners, family members in management, entrepreneurs, students, and non-family members working and/or employed in family businesses.