



# The Faces of Family Business

Harnessing the Power of People

5-7 June 2024, London  
155 Bishopsgate, EC2M 3YD

Principal Sponsors

**Deloitte.**  
Private

 **NatWest**

## Conference Programme

### Wednesday 5<sup>th</sup> June 2024

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#### 17:30 – 19:00      **Community Meetings**

Meet with a trusted network of peers from family businesses to share experiences with, seek advice from, and draw support.

Community Gatherings\*:

- Chairs Community venue: [Clays City Moorgate, 55 Moorgate](#)
- NextGen Community venue: [Swingers City, 8 Brown's Buildings](#)
- Non Family Community venue: [Pitch City, 62 Bishopsgate](#)
- Non Executive Directors (NED) Community venue: [Dirty Martini, 158 Bishopsgate](#)

\* FBUK Community Meetings Gatherings are open to relevant FBUK Members only eligible to be part of an FBUK Community only. For terms and eligibility, please get in touch. Please note that advisors, sponsors, partners and non-FBUK Members are not eligible able to attend FBUK Community Meetings.

Please note: Community gatherings are only open to those with a conference booking.

#### 19:00 – 21:00      **Welcome Reception**

Get to know other Conference attendees at this informal gathering ahead of the start of the main Conference.

Welcome Reception venue: NatWest Conference Centre, 250 Bishopsgate, London, EC2M 4AA ([Map](#))

## Thursday 6<sup>th</sup> June 2024

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08:30 – 09:00 Registration, networking and refreshments

**09:00 – 09:30**      **Welcome**  
**Sir James Wates, Chairman, Family Business UK**  
**Neil Davy, CEO, Family Business UK**

**09:30 – 10:15**      **Finders-keepers: recruiting and retaining talent**  
**10:15 – 10:30**      **Q&A**  
**James Reed, Chairman and CEO, REED**

When family businesses seek to proactively develop their workforce, champion people, and offer equal opportunities, what benefits can be harnessed for the success and growth of the business? How can you showcase the importance you put on people, when recruiting and retaining talent? James Reed, Chairman and CEO of the leading recruiter in the UK and family business, Reed, shares his perspective and passion around recruiting and retaining talent in a family business.

Explore the challenges, opportunities and benefits which are particularly evident for family businesses when we strive to harness the market-advantage that family businesses have for recruiting and retaining talent.

10:30 – 11:00      Networking with refreshments

**11:00 – 12:30**      **Workshops**

1. **The family album: who's in the picture?**  
**Catherine Grum, Catherine Grum Consultancy Ltd**

With families and businesses becoming increasingly complex, who do you consider to be 'family'? Who really has the power to influence and shape decisions? How do they do this and what rights should they have?

With consideration of a widening pool of stakeholders outside the 'nuclear family' this workshop will focus on:

- How and when to offer more responsibility or ownership?
- What are the risks, benefits and opportunities when we consider a wider view of our succession options?
- How can the now and senior generations give greater opportunity for this wider involvement?
- Nature vs nurture: how stakeholders understand or challenge the family values.

2. **Balancing act:** *transition in a multi-generational family business*  
**Ken McCracken, Family Business Consultant, MFBC Limited**

With inter-generational boundaries becoming ever more blurred, challenging the traditional timelines of succession and a growing cohort of senior leaders thinking about their future role and place, how can different generations work together to ensure effective transition for the good of the family and business?

In every family business it is useful for each generation to understand what the other generation needs and wants. It is not always easy to get an answer to this question. In this workshop will focus on:

- Discuss how the phases of adult development impact our attitude to the business and the decisions we make.
- Practical empathy exercise: a starting point for these potentially sensitive discussions; for each generation to understand what the other generation needs and wants.

3. **Family skill sets:** *do you know what your family are really made of?*  
**Kedge Martin and Catherine Carleton-Smith, Kedge Martin Advisory**

Do you understand the skills your family have, and whether they are deployed in the right places? Do you have the right people in the right roles? How can you identify skill-gaps and the right people to fill them?

Within the ownership and management of the family business there are lots of places that family can add value. This workshop will focus on:

- Practicalities of how to carry out an evaluation of the family's skills.
- Expert guidance to create a process to implement in your family business.
- Peer advice and shared experiences

4. **Moving beyond manager:** *developing as a leader in business and in family*  
**Jay Bevington and Harry Carney, Deloitte**

When you are the figurehead for the business or family or generation, it is important to understand your leadership style. What would your family, peers, and employees describe you as? And is that what they, and your business, really expect, or need?

As a family business leader, you have a huge opportunity to impact the culture of your company. But this also means, much depends on whether your style positively inspires those around you. This workshop will focus on:

- The skills needed to be a successful leader
- How to inspire employees and adapt to their different needs
- The nuances of leading those who are part of your family

5. **Level up:** *Next Gen development as an ongoing journey towards long term success*

**Juliette Johnson, Juliette Johnson Consultancy Limited**

When is the right time and what is the right way to start educating the future generation about the business they might one day lead or own? The answer is simple, it's never too early, but it's an ongoing evolving journey. Developing the next generation is most definitely a marathon not a sprint! This interactive workshop aims to encourage families to explore the varied approaches to next gen development and will provide everyone with some food for thought to take back to their own families for discussion.

Introducing the Villax Family, an amazing third generation business family who are on an incredible journey to develop and prepare their next generation for the responsibilities ahead. During this live case study, we will invite the audience to join the journey of the Villax NxG, who will share their experiences to date for the benefit of others, but also to hopefully get some wisdom and advice on their plans ahead, from those who may be further ahead or with different approaches to their own.

This interactive workshop aims to encourage families to:

- explore the varied approaches to next gen development
- recognise the changing requirements of next gen programmes over time
- learn from the experiences of others and take some food for thought back to their own families for discussion.

12:30 – 13:45                  Networking lunch

**13:45 – 14:45                  Cultivating a sense of belonging**

**14:45 – 15:00                  Panel Q&A**

**Hosted by: Rebecca Robins, Global brand advisor & Intergenerational Expert**

**Panellists:**

**Michelle Ovens CBE, Small Business Britain**

**Dr Rimla Akhtar OBE, Bettys and Taylors**

**Matthew Ayres, Bennie Group**

What helps to create a sense of belonging? How can you empower people to be comfortable as their true selves in the workplace? A family's strength is in its differences, the same should be true of a family business. Belonging means that people can bring their full selves to work, and not feel like they are a different person there than at home. A family who can accept and champion differences is one that creates a sense of safety; a family business should offer this same security. This open and honest conversation will help you recognise areas to help people feel understood, supported and engaged.

15:00 – 15:30                  Networking with refreshments

**15:30 – 17:00**

## **Workshops Part 2**

### **1. Rewiring the family: *modern families and legal structures* *Bryony Cove and Richard Lane, Farrer & Co***

Are you relying on outdated governance models and legal structures to run the business? Do they really reflect the reality of what your family and business look like today, or might look like in the future? As the family grows and those becoming owners changes, the documents underpinning the business should be adapted.

This workshop will focus on:

- How can the governance architecture be adapted to create an appropriately inclusive structure with a view of balancing stakeholders appropriately?
- Who do you consider as influencers and owners of your future business?
- What legal implications are inherent when managing complexity?
- What documentation could support the longevity of the business?

### **2. Taking the next step: *a case study in family business transition* *Ken McCracken, Family Business Consultant, MFBC Limited***

Do you know what your family members want to do next? How can family members support one another in identifying what's next, plan how to get there, and support each other in the process?

In this Q & A, Peter Vickers and Will Vickers of Vickers Oils Ltd. will discuss their experiences of managing the transition in leadership of their family business, including the changes in their roles, diversification of the business, the role of their shareholders' council, and engagement with owners. Plus, whatever questions the audience want to ask.

### **3. Adding value: *how to onboard and support incoming NEDs* *Mairi Mickel, Founder of Mairi Mickel's Business Families in an interview with Peter Lederer, Portfolio NED and Chair - Baxters Food Group, Hamilton & Inches and McLaren Packaging***

Supporting incoming NEDs – whose role is it? Whether being appointed from within the family or from outside – how can you best support your NEDs and Chairs so they truly understand the business and family culture, and effectively contribute to its future?

Incoming NEDs need to be set up to add the most value to the business, influence strategy without taking over executive responsibility and challenge the Business Owners. This workshop will focus on:

- Explaining the role of NEDs and what is expected of them in practice, including what's not typically on the job description

- Discussing the roles of Recruiters and the Owners themselves in supporting NED & Chair onboarding.
- Exploring how the NED/ Chair can add value while exploring and embedding the family values at Board level.

4. **Power to the People!** *the art of employee engagement*  
**Sarah Dean, Duncan Everett and Louisa Hogarty, Noble Foods**

Are your employees empowered to drive business performance and capitalise on change and uncertainty? How do you empower people to succeed?

This session will provide an in-depth look at leadership behaviours which manifest a safe space for experimentation whilst maintaining core rules and processes. This workshop will focus on:

- How to transform to culture to drive success
- Creating a toolkit to suit your family business including:
  - Empowerment
  - Living purpose and values
  - Investing in personal growth

5. **Rules of engagement:** *employment policies for the modern world*  
**Juliette Johnson, Juliette Johnson Consultancy Limited**

An employment policy that isn't fit for purpose can have long-lasting impact and send some very confusing messages to the business, the family and to the next gens themselves. As no two families are the same, no two employment policies are the same. This interactive workshop therefore aims to explore employment policies from all angles to help establish whether you might benefit from one or indeed whether the policy you have today, is fit for purpose.

Drawing on the experiences of a panel of family business owners, this session will:

- explore the benefits of implementing successful employment policies
- unpick the common challenges that arise
- breakdown the various elements of a family employment policy
- challenge 'best practice', debunk myths and explore common blockages
- highlight what is required to make a family employment policy successful and sustainable

**17:00 – 17:30**                    **Advocacy Update**  
**Fiona Graham, Family Business UK**

19:00 – 19:30                    Pre-Dinner reception

19:30 – 22:00                    Gala dinner

Join us in the art-deco elegance of Banking Hall, London. This beautiful Grade II space, which boasts unique views over the Bank of England, is the venue for a sparkling reception, followed a 3-course gala dinner.

## Friday 7<sup>th</sup> June 2024

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09:00 – 09:15            Networking with refreshments

### **09:15 – 10:45            Family Business Labs**

*These labs will be led by carefully selected family business advisors and industry experts to guide and strengthen skills for your family and business. Sessions will be a mix of facilitated productive conversation, process creation or framework building.*

#### **1. Rewarding and recognising people:**

***Nick Robeson, Boyden***

What should a fair and motivating bonus or incentive scheme look like for your family and business? How can you go about setting it up? What are the unintended consequences of getting it wrong? This lab will offer the opportunity to understand the philosophy of reward and how this translates to build a sustainable and robust LTIP framework.

#### **2. Building your boardroom:**

***Nick Ellerby, Oasis Human Relations***

Do you surround yourself with people who play different roles, offer new ideas and perspectives, and challenge you? How can you make sure the people around you support your personal long-term interests and professional ambitions? This lab will offer the opportunity for you to embrace your family's network while creating one that is distinctly your own.

#### **3. Coalescing around change:**

***Alex Sharpe, Kinestra Partners LLP***

In a family business, long term sustainability requires adaptability and change. What can be learnt about managing change so that when change is needed within a family business, we bring people along on the journey? This practical lab will offer the opportunity to consider how to approach transformation and change within a family business. We will consider generational transitions, business evolution and leadership team succession as the complex and inevitable backdrop to managing successful change in a family business.

#### **4. The elephant in the room:**

***Russ Haworth, The Family Business Partnership***

How can you positively navigate workplace relationships when there is an imbalance of influence? How can you successfully use your personal authority in

difficult situations? This lab will offer the opportunity to learn techniques to manage challenging situations, family and professional relationships.

## 5. **The “S” in ESG:** **NatWest**

With such a focus on the ‘E’ (environment) and ‘G’ (governance), why has the ‘S’ (social) been overlooked? How can family businesses demonstrate ‘social leadership’ when so many others seem to be looking the other way? This lab will offer the opportunity to integrate and amplify the social element of your ESG plan.

10:45 – 11:15                      Networking with refreshments

## **11:15 – 12:00                      Be extraordinary**

**Hosted By: Catherine Grum, Catherine Grum Consultancy Ltd**

### **Panellists:**

**Mark Samworth, Samworth Brothers**

**Jeremy Field, CPJ Field**

Does your family business positively impact local communities? How can charitable causes or activities be harnessed to further embed culture and purpose?

A session to recognise and applaud some of the family firms leading the way in thinking differently about how they maximise their impact on improving the lives of those both within and outside of the business; which more widely showcases family businesses’ positive impact in society. Hear how charitable giving helps to instil a culture based around their family values, and how this engages family and non-family, inspires the next gen and achieves their wider purpose.

- Are employees more invested in the family values when demonstrable activities are aligned with them?
- Does prioritizing societal purpose create a better culture?
- What impact does this have on the family brand?

**12:00 – 12:30                      Harnessing the Power of People:** How to turn good directors into a great board

**12:30 – 12:45                      Q&A**  
**Jennifer Sundberg and Megan Pantelides,**  
**Board Intelligence**

To build a great board, you need to hire extraordinary board members. That’s how the traditional board manual goes, but we all know it’s not quite so simple. Of course, it never hurts to have great people around the table, but we can’t always control who’s there. And a group of big hitters doesn’t always translate into a high-performing board.



What matters just as much is how you set your board up to succeed. You wouldn't give Lewis Hamilton a rusty old car and expect him to win a World Championship, and board directors are no different. If you're to perform at the top of your game, you need the right tools for the job.

This session will explore how directors can enhance their own, and others', ability to add value through the board. With tips for productive conversations that harness the company's collective intelligence, the session will discuss:

- How to make sure your board is having the conversations that matter
- How to get the information and insight you need as a director
- The unexpected benefits of unleashing a board's collective intelligence

**12:45 – 13:00**                    **Closing remarks**  
***Neil Davy, Family Business UK***

**13:00**                            **Conference close (packed lunch)**

A packed lunch will be available to take away for those who have plans or need to travel. However, the venue is available until 16:00 so please feel comfortable to stay and network.

**13:30 – 14:30**                    **New Community Meeting**

Following initial discussions with a number of FBUK Members, there is interest in forming a new FBUK Community designed to:

- share, connect and learn from one another on social and environmental issues in relation to family businesses
- further debate and thinking around the ethos of a 'Purposeful Family Business'
- formulate views on the goals of policy in creating and protecting the systems and regulatory environment in which family businesses operate