

Rochelle Clark (00:00):

Values are not taught, values are caught. So it's one thing for you to sit back and say, you know, this is what you believe in as a family. This is what I would like my kids to follow. This is the way I would like them to ask, et cetera. And you can write it down and go, if you want to put it on a plaque on the wall if you want. Yeah, but you may as well throw that out the window if your actions are not in alignment with what you're saying.

Jon Vroman (00:25):

Gentlemen, welcome to the front road out podcast. I'm your host, Jon Vroman. If you just stumbled upon this show, we're here to talk about family. Well, many of us are running businesses and so there's an intersection of family and business. That's a fun one to play with and that is how can our businesses serve our families? How can our businesses not prevent us from being great dads? Maybe compound our impact at home when we get everything working in harmony and my guests today, I'm so excited to have this conversation is Rochelle Clark who happens to be an Amsterdam. That's pretty cool, Rochelle. That's pretty awesome. John. I'm so happy to be here. I love this. Um, in Rochelle you do something really interesting where you help people with business continuity, business succession plans and conversations. And when I think about a good dad or a good businessman and a good blend of those two, I think about somebody that takes care of the here and the now.

Jon Vroman (01:24):

Yeah. So they're doing a good job to take care of the here and the now. But I think exceptional dads, right? Exceptional business owners, they're thinking about generations to come. Right? And that's where their head's at. And I think that's really cool and I can't wait to get into that conversation, but before we take the dive down into that road of like, all right, a lot of our guys are listening to this going, alright, cool. Yeah, I haven't thought about that. I haven't thought about like how do I hand my business off to my kids? Maybe they're like, I don't need to think about that. That's 20 years down the road, but maybe now is the time to start thinking about the systems that need to be in place or what conversations need to happen rather than playing catch up at some point or feeling panicked when it needs to happen. Maybe we can start talking about it now, but I want to start with where you're located. Why are you in Amsterdam? Cause I love that city. That's a cool city. My wife and I were there a couple of years ago. It was awesome.

Speaker 3 (02:18):

Excellent. Listen, it's a really good city to be in and I made a decision a few years ago. I had to decide where I wanted my business to be located. Of course, we are registered in the us, but in order to reach clients from all over the globe, because I also work with clients who are based in Asia, I decided, you know what? It's the time of my life where I can make a decision right now. That's maybe a little bit selfish. I know it's probably a little bit different. Difficult for others to me, but I said, yeah, let me be in the center of the globe time zone wise so that I can serve as both. And then of course Amsterdam is a beautiful, beautiful city to be in as you and your wife would have noticed you were here

Jon Vroman (03:00):

and yeah, it's a decision that I don't regret my time between Europe and the U S at the moment. That's so cool. Well, I love that and I love lives by design. Like when somebody just starts talking about the life that they've created by design, that fires me up. There's a part of my soul that just comes to life. Hey, there is a rest. We had such a blast being an Amsterdam, I could easily see living there. I have a relative

who was living there for awhile. Best friends was there a bunch of times and so I feel very called to Amsterdam in general. I think I have history there visiting again. Oh, I'm ready to come see. Yeah, this is cool. There's a restaurant there. I got to know if you've eaten at the butcher. Have you been there? Yes, I have. And I actually rode my bicycle by there two weekends ago because it was Easter weekend.

Jon Vroman ([03:54](#)):

Coronavirus looked down and the butcher was of course closed, so it was the Duchess, which is located across the street from the butcher. So yeah, some of my favorite restaurants, I really enjoy eating there as well. Some of the favorite ones are cool. Yeah. So great. At the moment I had so much fun. I, you know, no matter how many times people will tell you about the amount of bikes or how the biking system works, I don't think it'll prepare you for actually what you'll see, not at all. And you know, even as a local at the moment, sometimes I still get almost run over by bikes because they are everywhere. It's the best walking city too, in my opinion. It just felt like I was always in like the coolest part of town. It almost didn't matter where I went. You know, sometimes in certain cities you're in one neighborhood and then you're not in that neighborhood.

Jon Vroman ([04:44](#)):

And it just felt like all the neighborhoods were Epic. It was like everywhere I walked it was, the buildings were always at a height that just made it feel very communal. And maybe it's all the water, all the walkway is all the kind of corner restaurants or bars or coffee shops or whatever they were. But it was, man, that was just so cool. So anyway, as you can tell, I have a lot of good energy around it. So Rochelle, let's, let's just dig into what you do. Yeah. When you meet an entrepreneur or a business owner, whatever title we want to give them, right? Your clients or potential clients in as few words as possible, how do you help people understand your real value in what you do? Because obviously there's so many people that are in different situations and you have, I'm sure that there's a vast array of services that you might provide, but in general, how do you describe it in as few words as possible? So the way that we phrase it is by saying we keep good businesses in business for generations. Hmm. Yeah, that's it. So it's about protecting the business that you have now and planning to pass it on successfully and smoothly. Yeah. And is there any particular size business that we're speaking to right now?

Speaker 3 ([05:58](#)):

I mean who should be thinking about this? Listen, businesses of all sizes have these thoughts and concerns on their minds at the moment. All sizes and all industries. Because listen, as a business owner starting up a business, sometimes it can be one of the most challenging things and sometimes it's definitely a passion. It's a passion project that you pour your whole life into sometimes. So it's about preserving the hard work that you've done as a business owner to grow the business to where it is and then ensuring that you're putting the right measures in place to ensure that that continues into the future as far as possible so that you and your family can reap the benefits. How many people are interested in passing their business to their family and how many of them are just more concerned about passing it along person to lead their company or group of people?

Speaker 3 ([06:59](#)):

Yeah. So I think because of what we do and because we position ourselves as let's say family business advisors, most folks who come to us have the intention of passing the business on to family. But here's the catch with that John, a lot of business owners or businesses, you know, whether it's owner or successor who come to us sometimes come to us a little bit too late down the line. So you have a

situation where there's an owner who was more or less at retirement's door, who's ready to sail off into the sunset and say peace out on, on this whole business operation. And in their minds they're thinking, Hey, someone from my family will take over this business. So they're more or less just looking for the next warm body to take over the operations of the business. It doesn't always work out the way they plan in many instances, it's not a family member who ends up taking over the business a, because maybe there's not the desire on the part of the family member be the family member may not be prepared for it.

Speaker 3 ([08:00](#)):

So for a number of reasons. What do you then find is that they kind of look around and they kind of say, okay, well if not to the family member who else is available that can take over this business. The saddest stories that we deal with are stories where there's not an eligible person to take over the business and the owner decides, Hey, I'll just sell it. Well, the business that we're in, the ecosystem that I work in also involves, in some cases business brokers and every time we hear those words, well, I'll just sell it. We get goosebumps. We get goosebumps. And the reason for this, John, is that, listen, it takes as much work to prepare a business for sale as it does to prepare a business. Did he pass it on to someone else? It's not something that you can just wake up one morning and say, Hey, this is what I'll do. It takes a lot of work, takes a lot of preparation. So business owners who are about to retire or considering retirement need to ensure that they're doing that work ahead of time to set themselves and their businesses up for success. Whether they decide to sell or pass it on.

Speaker 3 ([09:14](#)):

That's really an interesting side. When we were talking or when I was thinking about our conversation, there were two terms that came up. One is this succession planning and the other one is continuity planning. Are they the same? Are they different and if they're different, how so? They are different. They are different. Succession could be a part of continuity funding in every business continuity plan. There is some elements of succession and let me take a step back because this is actually a little bit personal to me. When I decided to start this business, it all started when I found myself flying home from a family funeral a number of years ago, frantically putting a business continuity plan in place. The owner had passed away. His daughter, he had a succession plan in place. He said, my daughter will take over the business. She had not completed the work that was required to be ready to take over the business.

Speaker 3 ([10:16](#)):

So she wasn't ready to take over yet. So he had it a crisis of succession. So there we were as a family, planning a funeral and figuring out how we're going to keep a business running when many of the family members had absolutely no idea what was in the owners head or how he ran the business. So it was a situation where I was putting this plan in place and then I had to take us after I sent that off, I took a step back and I said, wow, so many family owned businesses are so vulnerable when it comes to managing their affairs from a continuity perspective. But you know, John, it was one of those things where I then said, Oh yeah, but somebody else out there is going to be helping somebody else is going to run with this idea. Somebody else out there is going to show them the light.

Speaker 3 ([11:05](#)):

And it was this idea that kind of sat with me for quite some time and I said, wow, well I have a decision to me if I'm going to be healthy family owned businesses, there has to be an element of business

continuity in place. Just given my own personal experience and the fact that I knew the impact, but any minor disruption, not even talking majors, so we're not even talking pandemic, any disruption can have on a business. So that became a key part of the services that I offered. Business continuity planning, and then of course succession planning. But in a business continuity plan, it's how do they keep the operations of this business going in the event that something were to happen, whether it's to an owner, so you're talking unexpected illness,

Jon Vroman ([11:54](#)):

death, the unexpected departure of a key number of the business. So these things needs to be top of mind because businesses are vulnerable and we're seeing that even more now given the global pandemic that we're living through. Any disruption is a shock to the system of a business. And there are only so many shocks that a business can actually withstand and still keep going. There's so many shops that a business can withstand and he growing. So every shop that your business has to go through and let stand, it takes you a step or two back in terms of your growth trajectory. So the importance of a business continuity plan is to protect that business from as many shots, unplanned shots as possible. So there is the elements of succession that's in there because the plan does identify, okay, if something were to happen to this person, then this person will take over.

Jon Vroman ([12:50](#)):

It does go into detail around, you know, these are the key activities of the business. What are the work arounds, whether they're manual or now virtual, it goes over, okay, this is the amount of it. This is the type of insurance that we need to have. These are the amounts of insurance, this is how we continue to get paid. This is how we continue to pay key stakeholders in the event of a disruption. So it basically puts the operations of the business into a document so that anyone else can basically step in and keep that business running. Because the pandemic that we're facing now shows even more now, more than ever, that businesses rely on cash flow to keep going. So this ensures that, okay, even if there's a disruption, how can we ensure that there's still that cash? What's the plan to ensure that we're still in operation so that we can preserve the cash flow?

Jon Vroman ([13:44](#)):

Yeah. How would a guy self-select that they need to be thinking about this? Because I could easily see for myself, Hey, my boys are 10 and five, I'm just beginning to build front row dads. We've only been in this for a couple years. We have so many other things that are higher priority for me to focus on. Then succession planning like we need to build before we have something to hand off. That's part of it. But then I also think to myself, like if in the unfortunate situation where if something were to happen to me or I couldn't run the business, man, I really wouldn't want this to stop right now. I would want it to continue on. And so there's a part of me that thinks like, Hey Rochelle, this was awesome. Thanks for the chat. I'm going to shoot a quick text my buddy today and say, Hey man, if anything happens to me, like make sure that front row dads, it doesn't die. Right? Like keep it going. And that's my planning. That's me. That's me doing like the little hinge that swings the big door. But I'm sure that's out of ignorance. Me scrambling to be like, man, Rochelle really brought something to light that I wasn't thinking about. That's my gut reaction. Just shoot that quick text to my buddy Howe and be like, dude, take over. Yeah. But then how it comes back and says, wait, what? Yeah. Right. Right.

Jon Vroman ([15:03](#)):

How the heck does this thing work? So a continuity plan basically puts the playbook of your business and in Paul's hands so that he knows, okay, this is, these are the key people that we reach out to, et cetera. This is how I really step-by-step keep this business running, but your, your question is really good. How do you self select? Listen, John, if you were running this as a hobby on the side, right? You're making your pocket money. No one sees it or maybe use it to go out to buy bears with the guys at the end of the day, basically, no one cares. Sorry. It's a passion project, but no one cares. The moment, the moment that people are relying on the income of your business, it's the moment you should have a continuity plan in place, and I'm talking about family members, I am talking about employees.

Jon Vroman ([15:53](#)):

I'm talking about creditors to the business, right? I'm talking suppliers, I'm talking vendors. The moment that's somebody else is relying on the income of your business for something. That's the moment that you need a business continuity plan in place, right? The amount of peace of mind, right? That some family members feel after they've had a plan in place, it's a weight off the shoulder. Yeah, right. Because then you know why you still have to go around saying, well, you know, if something happens to my husband, you know, I don't even know where to back accounts are. I don't even know who, who our lawyer is. So a plan puts all of this information into one place so that God forbid something were to happen, someone else can run into it. So the moment anyone else other than yourself is relying on the income of your business.

Jon Vroman ([16:43](#)):

It's really, yeah, I love that. You know, we try to do that in our business. I don't think we've knocked that out of the park at all. We have what we call our own, our own is our operation manual, right? So it's like we're constantly saying, Hey, document that and put that in the own. Now my bet is that if anybody ever had to take over my business, they'd look at the home and they'd be like, fuck is this scribble? But you call it, Oh, that's truly probably what would happen. But it's really gets me thinking. So, Oh sure, parents did this recently. My parents are in their seventies and my dad sent my sister and I a link and said, Hey, here's a document in the unfortunate situation where something happens to us. Here's where you find everything. This is where we have this, this is where we have that, this is who you'd call.

Jon Vroman ([17:34](#)):

These were our wishes, this is what, so it's literally one document that I don't even know if I could find it right now, but I bet you it's, hopefully it's titled well so I can dig it up. But I thought that was really cool and really responsible and really proactive on part too. My dad's a planner. He's a thinker, ex-military, you know, just, he's so dialed into that stuff, you know, and that and all that. You know, when I was younger I think I was all my energy into growth and building and I was invincible. And, and then at some point, I mean I think you start to realize that you're not invincible. And that's when I got it. Term life insurance. And that made me feel a lot better because I was like, well at least if we don't have millions in the business and a great succession plan or whatever, that at least my family is going to be okay if the plane goes down is and element of comfort with that.

Jon Vroman ([18:25](#)):

I can see that the element of what you're talking about though is a another level of maturity in your business, in your life feels really responsible. Like I could almost see this helping me sleep better at night knowing that this thing I care so much about would continue if I, if I couldn't be the one leading it. Exactly. And you know, in our business continuity plans we also talk about in a disruption, what types of

insurance do you need. So business interruption insurance is one thing that we recommend. Yeah, of course you're going to talk with your insurance provider to figure out, you know, the right amounts, et cetera, and which ones are ready. Key person insurance, whether it's key man insurance, key person insurance, whatever it's called in your market is something else that you recommend. But it's helping you think. It's basically a will for your business.

Jon Vroman ([19:14](#)):

Yeah, I totally see that a hundred percent and where Rochelle for you to, I know the story obviously just shared like how this came to be for you and how it was deeply personal. Do you have a background in, in LA or no, not in law. In operations because at the time of the funeral of, in my previous career I was putting continuity plans in place for operations, all sizes and I'm talking mega operations all over the globe. So for me to be putting something like this together on it, airplane flight, back home from a funeral, it was because it was something that I was very familiar with. Right. So so testing and examining continuity plans all over the globe is something that was already in my background. So for me it came naturally. So it's a combination of naturally this is, this is what I had done in my previous life, but then also practically knowing what the business was walking through at that moment.

Jon Vroman ([20:09](#)):

Yeah, helped me home the plan to be more specific to a family owned business or to an actual business operation. Which may not be on the mega scale and may not have the negative resources that a global conglomerate at my house. No. It sounds like you specialize in family owned businesses. Yes, that's right. You can help because that's my background, but you can help anybody. Yeah, absolutely. So when we're talking about continuity, it's about any type of business where the family or family business comes in is some of the additional work that we do to help families with their family dynamics. So their communication,

Speaker 3 ([20:48](#)):

ensuring that they have the right governance and preparing the successors for for the next role. But this work that we do and really applied to any business that's out there. Isn't there a TV show about this or something about John? There are so many shows out there about drama and family owned businesses. There's one called family business, there's dynasty, you name it. There is so much drama that can happen in a family business that it makes for good TV. Right? You always get an interesting TV. So we're a series out of it, but it's really sad actually when you're actually sitting across from a family that's going through some of this drama in real life.

Jon Vroman ([21:37](#)):

So this is the one, it's called succession. It's on HBO, right?

Speaker 3 ([21:41](#)):

Right.

Jon Vroman ([21:45](#)):

Yeah. The series of the fictional Roy family, the dysfunctional owners of a global media and hospitality empire who are fighting for control of the company amidst uncertainty about the health of the families. Patriarch Logan Roy. Somebody was telling me it's hysterical.

Speaker 3 ([22:01](#)):

It's hysterical. That's great. But you don't want to be a family like that,

Jon Vroman ([22:10](#)):

but not your, not your plan, not your model. Hey. So what's, uh, give me an example, Rochelle, of uh, you know, what's like the smallest business that you've been able to help and maybe even like the biggest business that you've been able to help most complex per se. I don't know how we define smaller big, but, and just to give a spectrum of scale because I think people try to find themselves in that spectrum somewhere.

Speaker 3 ([22:36](#)):

Yeah. So the smallest business I would say is from a business continuity perspective. And this, I was having a conversation with a young lady who reached out and she said, you know, Michelle, I have this business. I've been running it for you know, a year or two years. And for some reason I had to, I mean you didn't get into, you know, disclose the details, but she said, you know, I had to be hospitalized.

Speaker 3 ([22:59](#)):

I had to be hospitalized for what I felt with you. One week ended up being two weeks and I recognized that this business can't exist without me. You know, if I'm not there, the business doesn't continue. So help. I need help. You know, and this is when we sat down and we started talking about continuity counting and we were able to put a plan in place that she was able to share what's her, the delegates that, that she identified. But this is what I would say is the smallest business possible. It doesn't need to be a family owned business. It's just an entrepreneur who had others relying on her business. And we were able to put that in place from, in terms of size, biggest ones that we've worked with. I would say have been quite, we were talking conglomerate size,

Jon Vroman ([23:46](#)):

but in that case it was less about the operations of the business and more working with the family of the business, right? We're talking multi location located in different countries, right, and we had a family who was maybe three or four, they were on their third generation of ownership and the question became how do we manage this? There's so much conflict in the business. How do we get this train back on the tracks? So we sat down, had that conversation with them and we ended up having to do quite a bit of work in terms of aligning their values, realigning their values because within every generation of the business, and some of the listeners are probably not at this stage yet where you're, let's say three generations in, but like you recognize is that as your business matures, you'll be guided by values, your values got your strategy, your strategy guides your actions, right?

Jon Vroman ([24:43](#)):

That's essentially how it works with every generation of ownership. As you pass this business on, what you recognize is that you need to do a realignment of values because the players have changed and once the players around the table have changed, you almost need them to revise or redefined it so that they're more relevant to those who are sitting around a table. So that's a bigger piece of work. Where are we look soup to nuts on the dynamics of the family, the dynamic of the team, right? Of course, if there's conflict then we call in our team psychologist, depending on how complicated the issue might be. And then we work through those issues so that we can then get back to the business of putting the business back on track.

Jon Vroman ([25:31](#)):

Alright guys, I want to take just a quick second to talk about something really important now and know you're listening to the show because you want to level up your game at home, but if you want to take the next step within front row dads, I want you to do something today which is text the words front row dads to three one four six six five one seven six, seven three separate words. Front row dads. It's not case sensitive. I want to send you a few things right away. First, I want to send you a recording from a masterclass that I recorded with my good friend and author of the miracle morning, Howe L rod. He's a father of two amazing human beings and we recorded a show called the five habits of a front row. Dad, I want to send that to you because I think it is well worth listening to.

Jon Vroman ([26:08](#)):

Second, I want to give you 45 minutes of a mind blowing conversation that I had with a woman named Kevin NAMI and the show is titled have better sex, hugely popular. This will rock your world and likely your spouses as well, but I want you to have access to this information. Number three, I want to give you access to 1300 other front row dads inside of our Facebook group where you can ask any question, share any win, and give any resource that you think could be valuable to the community. And lastly, I want to include you in one email I send out each week. It's short. It's to the point that I pull from my life experiences along the insights for more than 135 members of our brotherhood. I want to give you the best of the best in each email. So all you have to do is just text the words front row dads to (314) 665-1767 and we will get you started today.

Jon Vroman ([27:00](#)):

I just had this vision of like you sitting around the table and then everybody starts showing their true colors and you're like, ah, hold on guys. Hey, that's really, you know, sometimes the issue that's presented to you, it's not the issue at all. Oh, someone feeling slighted. Yeah. They were kids that gave you the biggest piece of chicken. So he's always liked you. Yeah, that's right. Giving you the X or Y or Z. So the issues that we deal with can have multiple layers. See this is part of why I was so fascinated about this potential conversation. Rochelle, I think you have a very unique seat at the table to see some very candid, perhaps conversations amongst people when business is involved, right. That affects people's families, which is obviously the tie here. So my question is what have you seen, right? What's the pattern?

Jon Vroman ([28:05](#)):

What do you recognize in the most? Like what's the difference between the highly dysfunctional family fighting over the money in the business and disagreeing on things and they can't align, they can't get connected, they don't know what to do. Right. It's a lot of greed I'd imagine. And things like that versus the companies that you've seen that really have this succession plan and continuity program from a family perspective dialed in. Right. Cause I think the family perspective is the part I want to kind of hone in on here because I think that's where the gold can be pulled away and we can kind of cross pollinate in our lives where we say, look, I might not do succession planning tomorrow, but what Rochelle says about this, I could immediately implement into my conversations at dinner tonight. So I'm curious as to what do you see that works?

Jon Vroman ([28:55](#)):

What are the best practices of the people that are succeeding here? The best practices? Let me tell you, John, the most important thing that you can do as a business owner and as a father, as a parent, huh?

Communicate. Communication is key, right? So get in the habit of talking about your business, but the family, there's so many businesses out there, the most successful family owned businesses talk about the business. Yes, of course there's some who say, you know, family time is family time. Business time is business time. There needs to be that separation, but your kids need to be in the habit of hearing you talk about the business, not only when it's going well, but also some of the that you may be

Speaker 3 ([29:42](#)):

facing, right? So that they know, Hey, this is why dad is doing what he's doing. Of course, of course it's, it's the same if it were a mom, but you know, just for your audience's benefit, this is why that is doing what he's doing, right? Have your kids involved so that they know conceptually, okay, maybe practically you may bring them into the business to help out in there so that they're that way. But what it does is that it puts your values on display, right? And this is one thing that I say all the time. Values are not taught. Values are halt. Values are not taught. Values are caught. So it's one thing for you to sit back and say, you know, this is what we believe in as a family. This is what I would like my kids to follow. This is the way I would like them to act, et cetera.

Speaker 3 ([30:34](#)):

And you can write it down in gold a few months. Put it on a plaque on the wall if you want. Yeah, but you may as well throw that out the window if your actions are not in alignment with what you're saying. Right? So values the best way for you to be teaching your family knows about the values when it comes to your business. It's by talking with them. Yes. Situation that we're living through right now is a prime situation to be sharing values because you have kids sitting around a dining table understanding that their business, their family's business is potentially going through turmoil. Right? But it's the actions that the owners of this business are taking. That will be the defining moment for that child and for that family. Right? Because the stories that are going to be told in 10 years, we'll harken back to a situation like this.

Speaker 3 ([31:32](#)):

Right. And you wouldn't have to tell your child, you know, we are charitable family and we believe in taking care of our employees. He wouldn't have to tell them. You know why? You wouldn't have to tell them John, because they would remember, Oh yes, I remember back when we had that pandemic. Maybe I don't know the details, but I do remember that was doing everything possible to take care of the employees and this is what seeps into the blood. So the first thing that I say, talk, talk, talk about the business, right? It helps build your values. Even if you're not sitting down going through a session with us or with someone to say, you know, let's define our values. You can't teach values. You live your values. Right? So that's the number one thing back to the topic of communication though. Communicate, communicate, communicate.

Speaker 3 ([32:23](#)):

The families that don't have this drama that really lived to see this business passed on from one generation to the next, since when there is the need for further deeper communication. So at the inkling of discord at the inkling of misalignment, they don't avoid having the conversation, right? They take the bull by the horns and they try as best as they could to address it. I have some clients who are almost on on speed dial carousel. This is a situation. Yeah, it hasn't blown up yet, but we just need some guidance on how to approach it, right? Because they recognize that any chaos within the family, if it has the opportunity to play out on the stage of a business, that's a disruption. But disruption is due to a business

is that it takes resources away going to be financial resources, certainly your energy, certainly your mental resources.

Speaker 3 ([33:19](#)):

So you're not going to be spending that on growing the business. You'll be spending that elsewhere, right? And if you're not growing the business, then you know you're not setting yourself up for success. So the two main, the main thing, it comes back to communication. Open and honest communication. If you're a dad out there, talk about your business. It may be the last thing that you want to do when you get home because maybe you want to shut down and turn things off. But this will be a benefit to your family, particularly if you're thinking long term. And the most successful families think longterm. They think generation. They don't think by the quarter, they don't think annual plan. They think, you know, if it's a father, Hey, my goal here is for the next generation. I'm growing this business, I'm caring for it so bad, my kids can benefit.

Speaker 3 ([34:11](#)):

Right? So they're thinking as much more longterm. For sure. How much of what you do is asking questions and allowing your client to determine their future. Like you're just there to pose the question. They dictate how things are going to go and then you help them put it into a playbook or whatever it might look like versus how much are you a consultant, Hey, this is what we found. This is what we found. Does it work? This is what I highly recommend. I'm going to advise you to do this. Where do you play a role between those two? It's a balancing act for us. And I say that because I, you know, it's described as part referee parts strategic guy for families in business. And let's be honest, John, we don't have the perfect answer for any business. The business, it needs to determine what works the best for them.

Speaker 3 ([35:04](#)):

So we can sit back and say, Oh, you know, this is how this business should be run. This is the business constitution for how the family should have meetings. It should be every quarter and it should be a conference call, a half hour conference call John that goes through the window. If it's a jeans and tee shirt family that just wants to sit around and have a beer and talk business about the family, guess what? You're still achieving the same objective but in a way that's authentic to that family. Yeah, totally. Right. So while we may come and say,

Jon Vroman ([35:37](#)):

this is what we recommend,

Jon Vroman ([35:38](#)):

our approach is more or less to see this is why we are recommending X or Y or Z, and then we cocreate with the family the most authentic way for them too and bloody that. I love it. Do you just use the word cocreate? That's a very excepted, appreciated and demonstrated term in my world quite a bit because of the people I'm connected to. So I like that. Do you use any particular framework in your designing of co-creation? You know, I'm kind of fishing here because one of my best friends is Jon Bergoff and he teaches a process called appreciative inquiry. Right. And so that's a process. It's a framework for conversations and where many stakeholders are involved. And by the way, if you don't know about John or his work, you should check out exchange. I think his website is called the exchange method.com or something like that.

Jon Vroman ([36:33](#)):

You would love it because he's remarkable. He is the go to guy group conversations and facilitation bar none. He's the best in the world right now. Yeah. I'm also listening to, uh, I'm also listening to what is it never split the difference by Chris Voss. Yep. I'd imagine that you were familiar with that book. I'm just curious as to like what tools and resources do you have available, because I'd imagine that not only are the systems that you employee valuable to our listeners and you know, to the guys I'm connected to where they're like, Oh, this is good, I should think about that. Or, you know, pros and cons of, you know, doing this now or later or you know, the stories there, but also like your ability to navigate or negotiate or facilitate is also a skill that's really important that you have a lot of exposure with.

Jon Vroman ([37:25](#)):

So any thoughts around that? Yes, yes, absolutely. So I myself am also a certified facilitator, so I'm very, very curious to check out the website for sure because yeah, I believe continuous learning is very important. So I take a facilitation approach to a lot of the work that we do. Of course there are frameworks that I follow in the business and one of them is our pyramid. If you can imagine a pyramid, the base of the pyramid is communication, unsurprisingly communication. So the first thing that I do when I engage with a family and we have an online assessment survey that helps families and it's free. So anyone can kind of go on there, fill out the questions, and they can gauge what elements of our framework they may need to work on, right? So, so that's a short way for them to do that.

Jon Vroman ([38:15](#)):

But when I sit in front of a family, I do that in more depth. So I get an indication or get an idea of what their communication is, like the communication dynamic. And this is from speaking with one person and then, and then speaking with key members of the family and other key stakeholders because there may be in the business, longstanding employees also have a perspective, right? So it's getting an idea, Oh, what communication is like in the business. Because I think John, as I've been saying before, communications runs everything. Then of course I look at the preparation, particularly when it comes to a succession conversation, when this business is about to pass on from one generation to the next, there's some things that need to be in place in order to prepare the next generation to take over and to prepare the outgoing generation too smoothly.

Jon Vroman ([39:06](#)):

Um, the park right? Or step aside. So we have some questions, but I really delve deeply into around preparation. And then of course the next at the very pinnacle is the actual execution of the succession, if that's what we're talking about. But it's always a very facilitative approach to kind of openly here and feel the dynamic right, of the family. Yeah. And it's like, I feel like I get hit over the head all the time with these lessons and I keep learning them over and over again. And it's one thing to know them intellectually. It's another thing to actually put them in practice everyday life. You know, especially when you're, when you're hungry or tired, and then you walk downstairs and you're from your office 30 yards away from your children and then forget everything you've learned from your amazing friend Rochelle. But the idea behind communication really being about listening, I mean, and that's really the core of great negotiation too, right? Or what Chris Voss talks about and our family counselor tells us all the time, it's really truly about hearing somebody and that they feel witnessed and heard. And yeah, I mean, I think that's where a lot of it does truly begin. Right listening. Absolutely. It's always a good lesson. I mean, and something that we know everybody's heard it, but we need, but the difference is how we practice it. Right? Absolutely. Yeah. Okay.

Jon Vroman ([40:32](#)):

Michelle, there's so much. I'm sure that we could talk about. This has been really wonderful. If guys want to explore this with you and what does that look like? Can they set up an exploratory call? Do they go to the website? If somebody is like, Hey, I want to learn more, dig, Rochelle, I want to check it out. Where do they go? Yeah, absolutely. So you can always visit the website, www.successionstrength.com check it out. We have lots of solutions on the solutions page. They can go in there and take the free assessment, check out any one of our products, but they can of course drop me an email info at successions, trends.com and either myself or someone from the team. Well, we have these exploratory calls all of the time, so yeah, just come on down. Listen, we're in the business of helping businesses, you know, successfully transition to the next generation.

Jon Vroman ([41:23](#)):

So more than happy to have a conversation and now doing a lot of your work on zoom, I would imagine, right? Yeah, quite a bit. You know, fortunately our level was as such where we did some of the work in person and some remotely. Now of course like everyone else in the world, most of the work is done remotely anyway, so we are very first in working in that way. Yeah, of course you are. Yeah, I love it. Well, Hey Rochelle, I can't wait to come hang with you in Amsterdam. Get get some food at the butcher. Go check it out. See some band go like, it's be awesome. Hey, this is really wonderful. I not only appreciate the wisdom that you brought to the call today and the things to be thinking about, but also your kind spirit and the way that you present it.

Jon Vroman ([42:09](#)):

Like I love somebody who brings a nice balance of intellect and also like this care and compassion and integrity that you can tell exists and lives within you. So I appreciate that so much. Anything else you want to say before we hang up? No. Listen, if you don't take anything else away from this, put a continuity plan in place. Your people will thank you. Even if you're not taking 10 2030 years down the line continuity plan, just to get one in place, and this was this, this is a drum that I've been beating from before coven, so it's important. Yeah, you're totally right. That's such a, and I bet you a lot of people are feeling that way in general right now, where in our dad's group, we've talked about this, where you said, how exposed are you? I remember one of our dads said that they were like, man, I didn't realize until this whole thing hit how exposed my business was.

Jon Vroman ([42:54](#)):

I just didn't realize it. And I feel the same way where we're trying to balance. Yeah. Paranoid prepared, right? Like yes. So I realized, Oh man, when you're clipping along and it feels like everything's always going to be there, electricity is always going to be there. Food's always going to be there. Toilet paper is always going to be there. All your customers are always going to be there. Everything's always going to be there. And then I don't want to live in a paranoid base, but I do want to live in a prepared space. I want to understand that anything that's been built [inaudible] collapsed. Anything. Yes. Right? And so I just need to be kind of, Hey, prepared for the worst and hoping for the best. Right? And working towards the best, but still prepared for, I want to put a parachute on type of deal.

Jon Vroman ([43:39](#)):

Right? And that's it. But you know, the most important thing that I point out, because yeah, business continuity plan isn't going to save you from Colvin, but that's not why it's put in place. Right? So folks who have business continuity plans in place, the reason that they're second, your lucky stars right now is

that they're able to say, Hey, you know what this plan did for me? I was able to not have to expend energy on figuring out how to keep this business running because I thought about it already. So when folks around me are losing their minds, maybe I'm losing money. That's not the frame of mind. Yeah. Person can think logically about how to keep a business running. So I'm happy that I have the plan, so that's kind of off my table. So I'm using my energy now to figure out, okay, what's the next step? How can I strategically respond to what we're dealing with right now? Yeah, so that those business owners, do you know what we're working on? How to

Speaker 3 ([44:32](#)):

adjust their business models to fit the existing new way of working? How do they prepare themselves to thrive once restrictions are lifted, because some business models have changed, but that's because they have the benefit of not having to figure out the the basics or the fundamentals of their business during the middle of a crisis. So also something to consider, but yeah, that's my big thing. Just put a continuity plan in place. We can think succession a little bit later, not too much later, but just, yeah, ensure, ensure that you're protected. Okay. Thanks for being here.

Speaker 4 ([45:06](#)):

Thank you so much for having me, John. Hey guys, if you haven't already done so, go right now to [front row ads.com/facebook](https://frontrowdads.com/facebook) and join the conversation that's happening right now on line. We designed this group for guys who are entrepreneurial in their thinking that are high performing guys with low egos. We're looking for the dads that believe in teaching their kids how to think, solve problems and be real leaders. We're looking for guys who believe in being family, men with businesses, not businessmen with families. We're looking for the fathers who have great knowledge but also believe that they have so much more to learn and we're looking for men who want to add value by sharing their wisdom and those that are willing to ask the questions that we all need and want answers to. That's [front row dads.com/facebook](https://frontrowdads.com/facebook) or simply go to Facebook type in front or dads and you'll get to our group and what we put in there links to all the podcasts and videos and other resources that you can't get access to anywhere else except for in this group. We want to give you the best ideas to help you with your marriage, balancing work and family life communication strategies with your spouse and also your children, travel ideas and even suggestions on the latest gear. That would save you time and help you be more effective. We've got updates on upcoming events and so much more. Go right now to [front row dads.com/facebook](https://frontrowdads.com/facebook) and join the conversation. I'll look forward to connecting with you there. [inaudible].