



# Family Business Leadership Academy





# Are you ready to be a leader of your family business?

The macro-environment in which you will be operating is going to be very different from that which the previous generation entered. Is your family business prepared? Are you equipped with the tools you'll need to make the changes necessary to remain resilient?



30 weeks



Academic and practical



Virtual & in-person learning



Mentoring



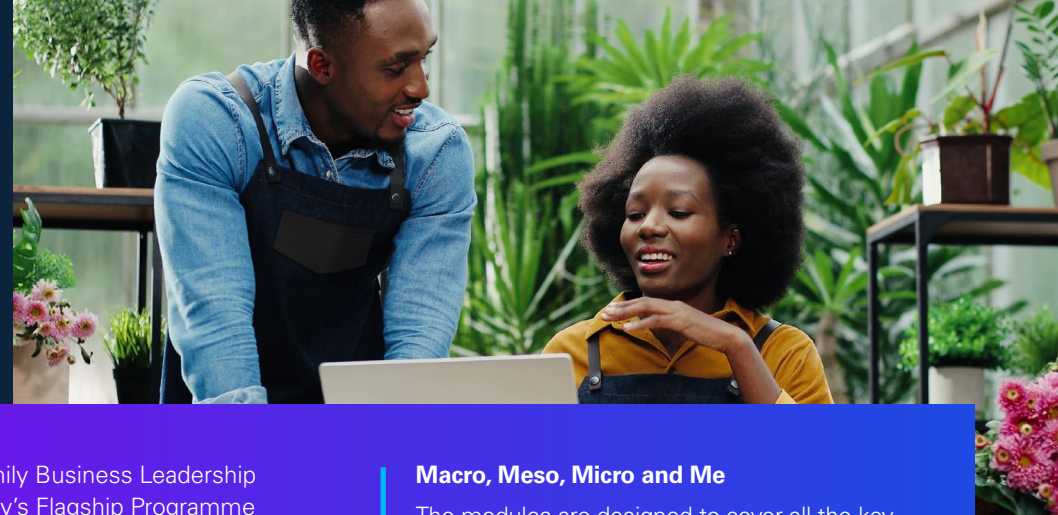
Peer networks



Project delivery experience



Hands-on project experience



The Family Business Leadership Academy's Flagship Programme provides an opportunity to gain knowledge, skills and experience. It's a programme specifically designed for future family business leaders which blends academic rigour with business mentorship.

Designed by the University of Leeds and KPMG, the programme is highly interactive and blends remote learning, residential study, peer networking, digital resources, and one-to-one mentoring sessions with a KPMG leader.

Your fellow learners will all be future family business leaders; you will have common experiences and perspectives but also be able to learn from each other's lessons.

## Continuing your leadership journey

And at the end you will come together for a graduation ceremony where you will celebrate the successful implementation of your project and become an alumnus of the Academy, giving you access to a lifetime of resources and networking.

## Macro, Meso, Micro and Me

The modules are designed to cover all the key areas facing family businesses today:



Leadership and team-building skills



Succession planning



Governance



Ownership issues and models



Sustainability and ESG



Diversity & inclusion



# Meet the Academy Directors



Family businesses play a key role in the UK economy and are drivers of entrepreneurialism, innovation and growth. But the operating environment is changing quickly. That's why we've launched the Family Business Leadership Academy.

This collaboration between KPMG and the University of Leeds builds on our extensive experience of advising and educating business professionals. This programme will deliver practical, relevant thinking that immediately resonates with the challenges and opportunities faced by family businesses.








The 30-week programme is an opportunity to develop insights and learning in the areas of leadership, sustainability, and governance in your business, including two separate residential learning sessions.

You will be supported along the way with a bespoke digital platform of resources including podcasts, a book club and regular online sessions with your KPMG mentor and your peer group of fellow learners. This will enable you to form lasting relationships with other family businesses – a network that will last throughout your career.

We hope you will join us in Leeds.



# Programme on a page

 Workshop knowledge topic	 Assessment	 Virtual topic	 Book club
 Workshop skills topic	 Podcast	 Peer learning activities	

From macro to micro – how well is your family business positioned to face the challenges of the future? ESG | Family Governance | Inclusive leadership

PREPARATION	WEEK 1	WEEK 2 - 12	WEEK 13	WEEK 14 - 29	WEEK 30
<b>Setting up for success</b> <p>You and your sponsor meet the rest of the cohort at the virtual Launch Event. Here you will hear more about the work to come, meet the Academy Directors and discover our digital platform.</p> <p>You will gain access to a blend of resources and be invited to take part in pre-course surveys so we can get to know more about you, your role, your business and what you want to achieve.</p>	<b>Macro to Meso (2.5 day residential)</b> <p>The big picture. The world which future leaders will inherit is very different from the one which previous generation navigated. You will engage in interactive sessions exploring future trends.</p> <p>Keynote speakers will explore trends, risks and some governance principles that are unique to family businesses.</p> <p>You will share your objectives and reflections you've had during the pre-course work.</p> <p>Then you'll have an opportunity to consider your project's objectives in the light of what you have learned.</p> <p>Our speakers will join you for dinner to continue the discussion and share insights.</p>	<b>Meso to Micro (remote &amp; on-demand)</b> <p>Between the residential sessions, you will meet your mentor who will help you to refine your project.</p> <p>A webinar will provide a deep dive into the importance of reflective leadership and how you can make your mark.</p> <p>You will explore technical knowledge via podcasts focusing on leadership skills and behaviours including creativity, communication, and innovation.</p> <p>And you will develop your project plan and provide detail on what success looks like.</p>	<b>Micro and Me (2.5 day residential)</b> <p>Is your business ready to meet the challenges you've identified? This is where your planning is put to the test.</p> <p>You will present your project plan to a "Dragon's Den style" challenge session with a panel of industry professionals. They will look carefully at business growth, innovation and environmental impact. Their feedback will help you shape the next phase of work.</p> <p>You will explore important leadership skills including managing high performing teams and succession planning. You will compare experiences with your cohort and discover how peers in other industries handle similar issues.</p> <p>Keynote speakers attend the formal dinners to share insights into next generation topics.</p>	<b>Make it happen (remote &amp; on-demand)</b> <p>This is where you will execute your projects using the feedback from the residentials and regular support through touch points with your mentor.</p> <p>You will continue to receive learning boosts through podcasts and book clubs and build technical understanding.</p> <p>And you will keep discussing your ideas with your cohort - virtually through a series of virtual peer learning group sessions.</p>	<b>Graduation</b> <p>We welcome you back for an in-person graduation.</p> <p>We will reflect on your project successes and your development throughout the programme.</p> <p>The programme doesn't end here! You'll be welcomed into the alumni network with a range of exclusive events and dedicated content.</p> <p>You'll be joined by future cohorts to create a network of family business leaders.</p>
<b>OBJECTIVES</b> <ul style="list-style-type: none"> <li>Identify ESG trends and reflect on which have an impact on your role</li> <li>Evaluate the maturity of your organisation using KPMG's Family Business dynamics tool</li> <li>Define three personal objectives you want to achieve on the programme</li> </ul>	<b>OBJECTIVES</b> <ul style="list-style-type: none"> <li>Understand FB Governance</li> <li>Identify the impacts of macro issues such as ESG on your business</li> <li>Explain how to implement change in a FB</li> <li>Understand the requirements of the assignment</li> </ul>	<b>OBJECTIVES</b> <ul style="list-style-type: none"> <li>Refine project plan with your mentor</li> <li>Describe how to be a reflective leader</li> <li>Explain how to manage people from different generations</li> </ul>	<b>OBJECTIVES</b> <ul style="list-style-type: none"> <li>Understand the importance of succession planning and what that means for you and your business.</li> <li>Complete individual project presentations</li> <li>State how to demonstrate leadership of high-performance teams in FBs</li> </ul>	<b>OBJECTIVES</b> <ul style="list-style-type: none"> <li>Complete your business project</li> <li>Understand how leadership affects how businesses nurture talent</li> <li>Explore financial stewardship for individuals and businesses</li> </ul>	<b>OBJECTIVES</b> <ul style="list-style-type: none"> <li>Celebrate successes and join the alumni network</li> <li>Review your initial expectations of your family business role and whether that has changed</li> </ul>
 Virtual launch event  Diagnostic assessments  Podcast 1: Family business and me  Welcome pack with book club intro	 Family Business Governance  The future of Family Business  Business Transformation  Peer Learning Group Activities  Horizon Scanning: how to spot risks and opportunities  Legacy: creating a lasting change  Project Selection	 Meet your mentor  Podcast 2: ESG in business  Podcast 4: Innovation/Creativity  Webinar 1: Decision making  Book Club virtual meeting  Podcast 3: Talent and Skills  3 Virtual Peer Learning Groups	 Succession Planning  Leading High Performing Teams  Persuading and influencing  De-risking succession  Peer Learning Group Activities  Project Presentations & Dragon Den Style Assessment  Escape room	 Mentor meetings continue  Podcast 5: Communicating change  Podcast 7: Financial Stewardship  Webinar 2: Reflective leadership and leading across generations  Book Club virtual meeting  Podcast 6: Intrapreneurship  3 Virtual Peer Learning Groups	 Graduation and project showcase  Intro to Alumni  Future learning opportunities  Intro to the Beyond platform



# Who is the Flagship Programme for?

**The programme is suitable for family members likely to take up a leadership, ownership or governance role in the coming years. You don't have to work in the family business today.**

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The business could be in any sector. To get value from the programme you need some management experience and a willingness to learn, study, reflect and be prepared to go on a journey of thinking and discovery.

For example, maybe you're part of a small family business who already has an active role in the leadership at a director level – and you're looking to move up to the C-suite in the next couple of years.

Alternatively, maybe you are part of a larger, more corporate family enterprise and are in a managerial role though not yet at director level – but there's a clear path for you to move up through the organisation in the coming years.

Whatever your current position, we will be very happy to talk it through and help you decide whether enrolling on the Programme is the right move for you at this time.

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# Meet Priya

**Priya's parents have an established family farm with a strong brand around a range of products centred on fruit including jams, juices and smoothies. They have a multi-revenue stream business including events, a farm shop which turns over £35m and a growing online business. The business employs 45 staff.**

Priya has a sister who has trained as a surgeon and who has little interest in running the family business, and it is clear that Priya will take over at some point in the next five to ten years. Priya has studied economics and recently qualified as an accountant. She works in the finance department for a national retailer in London.

Priya sees potential to grow the business significantly through new channels and new products. She thinks there is a strong export potential based on the success of other similar businesses and she is keen to explore a craft alcoholic beverages line.

These would both be new areas for the business and she will need to expand and strengthen the management team, particularly in marketing and in managing overseas sales. Priya currently manages a team of six junior staff but has no experience of leading senior teams or setting goals for a complex and pivotal part of her strategy.

She thinks her expansion plans will be a fantastic project for the programme and values the opportunity to get challenge and support from her peers. She is looking forward to discussing her ideas with her business mentor, honing her pitch with the Dragon's Den style panel and developing her management skills

## Growth story



Smaller business



Around £35m turnover



Significant growth potential



Works outside of the family business



2 years experience managing teams



5-10 years from C-Suite

# Meet William

**William is the third generation of his family's facilities management business. His grandparents started it as a cleaning business but it has grown to deliver services all over the UK and has a turnover of £400m. The business is mature and before the pandemic was growing steadily. The pandemic saw a temporary increase in intensive cleaning but reduced the win rate of new contracts. Now that contracts are returning to normal, William is worried about the capacity of the business to grow.**

The business model is based on a large workforce of mainly contingent staff on a little above minimum wage. In some areas it is very difficult to fill vacancies. William is aware of the impact of the cost of living crisis on the families of their workers and would like to increase all staff to the real living wage; his customers ask about ESG more and more. But this will put further pressure on margins. William thinks the answer is to streamline the back office, explore automation and release savings to invest in staff reward.

But not everyone is convinced that that degree of change is needed. William expects to take over running the business in the next 2-3 years. William has lots of experience managing divisions within the family firm over the last ten years but has never led a major change programme. He is attracted by the Flagship Programme to test his thinking with others in similar positions. He is keen to understand more about ESG and other macro trends facing his clients and the impact on future demand. And being able to run a pilot project with support from his learning group seems like a lower risk way to test his strategy.

## Risks ahead: change needed



Large, multi-generational facilities management business



Established, turnover of ~£400m



Faces significant ESG risk – relies on gig economy workers at minimum wage



Manages a division within the family business



Has management experience but has not led a major change project



2-3 years from taking over





# “Where do I sign?” – The application process

We make no apology that our standards are high. After all, part of the value of the Academy is learning from other families in business.

We are looking for at least two years of management experience (you need to have experienced challenges to apply the learning – and to have made some mistakes!)

And you will need a sponsor; a current leader of your family business who will help to shape the business project – to provide an opportunity to make a significant difference in your family business in the years to come.

## How to apply



Go to [www.kpmg.co.uk/FamilyBusinessLeadershipAcademy](http://www.kpmg.co.uk/FamilyBusinessLeadershipAcademy) to register your interest



We will send a short application form for you and your sponsor to complete



You will be invited for an interview with one of the Academy Directors



The interview outcome will be confirmed by phone call shortly after



The onboarding process will then begin





# Dates and deadlines

If enrolling with the programme is of interest, act quickly to avoid disappointment!

1

Make your application as soon as possible. Places will be filled on a rolling basis, with applications closing **3 months before the cohort you're applying for starts.**

2

Interviews will take place up to **6 weeks before your first activities begin.**

3

The programme opens with a virtual launch event and pre-work, **3 weeks before the first residential.**

4

You'll then join us for your first residential to kick-off the course and meet your peers.

# Beyond the programme

## 01. Continue the journey right here.

Your programme certificate unlocks an alumni network that includes access to KPMG Beyond. Beyond is a digital platform designed to help you build powerful connections, access the latest curated insight, network with peers and KPMG experts as well as participate in Community discussions. You will also have access to exclusive Beyond events designed to help you get the insight needed to unlock your potential.

## 02. Gain access to our international family business network.

Continue to share experiences and successes with your peers as you continue your family business career, sharing tips and discussing latest challenges with people like you.





# Any questions?

Lauren or Richard can answer questions about the materials, on-boarding process or programme structure.



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Tom or Angela can answer questions about KPMG's work with family business, or to discuss the role of the sponsor in more detail.



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Mark or Edgar can answer questions about the programme, to decide whether its suitable for you or for anything else.



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