



# Find your **learning champion**, shape your **family purpose**

## Your family learning champion is key to next-gen creativity and drive

By Patricia Saputo

Since the dawn of family enterprise, aging family leaders have pondered how to effortlessly pass on their affairs to their progeny and create a lasting legacy. For centuries, these succession issues have remained top of mind for family leaders.

Are the next gens capable? Are they interested? These big questions are enduring. Capabilities are not limited to skills, as they can always be acquired. But what about willingness? How do we fire up the next generation's imaginations? How do we sketch a business family future that reflects their aspirations? That's another story.

I believe that a family must begin this journey the same way one plans a trip. Although the actual trip may begin on a particular day, the pre-planning stage begins when the thought of the trip arises. In an enterprising family, the pre-planning stage begins when the family learning champion realizes that the next generation needs to be onboarded to take on the various responsibilities that come with being born into an enterprising family!

Some may think it is sensible to encourage the offspring of business-owning families to acquire advanced business degrees followed by years of external experience prior to entering the enterprising family ecosystem. Newfound wisdom tells us that a family's happiness is measured by the least happy family member. Happiness is nothing without meaning. And meaning is found when curiosity sparks passion. This results in a purpose that allows you to create something that has an impact. Allowing next gens to choose their own path, whether they lead to enterprising family endeavors or not, will help the family's cohesiveness and allow the family to continue purposefully for generations.

Few have moved the needle in terms of improving the enterprising family's chances of breaking the elusive third generation succession threshold, without impacting the family's wealth and wellness. However, there are a select few who have. Examples of such enterprising family longevity outliers are the Brenninkmeijer, Lee Kum Kee and the Mulliez families. What they all have in common is multi-generational thinking – the legacy plan.

Most families believe that concentrating on the financial capital of a family will help the legacy plan. But research has shown that concentrating on the human and social capital of a family helps raise the probability that the family's wealth will survive past the third generation.

Developing learning journeys for family members and understanding the roles each one plays within the enterprising family's ecosystem is important to their success. Governance needs to be emphasized and policies and procedures need to be established so everyone understands their respective roles based on the "hat" they wear – family member, business leader, owner. This provides different ways a family member may contribute to the overall longevity of the enterprising family.

A learning family orientation predates the origins of chief learning officers (see side bar) and has served the Mulliez group well. "Yes, it is difficult to manage a large number of shareholders," acknowledges Mulliez family associate Antoine Mayaud in his book *Enterprising Families*, "but on balance, the advantages outweigh the difficulties."

What may those advantages be? "There is more intelligence in 800 heads than there is in five or even 20," Mayaud writes. Reassuringly, the Mulliez family's robust and creative governance mechanisms mitigate decision-making risk as it is shared among hundreds of shareholders.

Workplace, or context learning, has become a key lever for success. Consequently, the traditional role of the **family learning champion** is changing. No longer are they responsible just for employee training or running leadership-development programs. They're embracing a more powerful role in which they reshape leadership capabilities and organizational culture.

Learning champions are transforming their organizations' learning methods, making them more experiential and immediate. They are shifting the focus from skills-development to the cultivation of mindsets and capabilities that help enterprising family members perform more adaptively.

It is worth pointing out a common yet vital feature of progressive learning champions: they augment their teams' capabilities by fostering "self-ownership" models of learning, in which employees and family set their own agenda for gaining knowledge and skills.

## A learning champion by any other name

When Jack Welch, former top boss of GE, made Steve Kerr chief learning officer in 1989, it was a world first. As the highest-ranking officers in charge of learning management, CLOs drive corporate strategy by aligning the development of people with business goals. In family-owned enterprises they are learning champions, whose goal is to encourage and empower families to become learning organizations. *Fifth Discipline* author Peter Senge defines such groups as "organizations where people continually expand their capacity to create the results that they truly desire, where new and expansive patterns of thinking are nurtured, where collective aspiration is set free and where people are continually learning to see the whole together." Is your family a learning family?

They are also future-oriented. So even in a family's journey – as in a trip one takes – there are always setbacks, no different than disruptive business events like COVID-19, financial crises or automation. With time, families gain strength and become more adaptive.

In 1993, the Mulliez family asked itself this key question: “**why, what for, and for whom**” did it want to stay together for the next 20 years? The beauty of posing such a question is that, in committing to answering, it automatically puts a family on a vision-driven learning path. Any family can do it, regardless of size or complexity. This process should include members of the rising generation as they play a defining role in this future-setting conversation.

Canada's enterprising family leaders would do well to answer the crucial “why and for whom” questions every few years, as part of their own vision setting process. And why not go further and ask questions such as “Where will our economic growth areas be?”

In asking such questions, multigenerational enterprising families could begin to engage in meaningful “human development through creation and business development,” Mayaud writes. The overarching goal? To see leadership as a resource that needs to be replenished or else it depletes and becomes obsolete.

If the idea of a chief learning officer as a sophisticated propellant for entrepreneurial families to become nimbler, resilient, and highly adaptive sounds overly corporate, then stick with “family learning champion” because our objectives – to bring purpose, improve and sustain over generations – are the same.

Once you find your learning champion, your family and its individual members will find their higher purpose, which will bring meaning and in turn, happiness.

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