



FACILITATING FAMILY COMMUNICATION & DYNAMICS PROGRAM

Several years ago I was talking with David Cohn about the issues professionals encountered when working with families, and particularly in families with family businesses and the competing dynamics of the family and business. David's comment to me was that if someone couldn't walk into the room in the face of uncertainty and relish the opportunity ahead, they shouldn't be doing this work. And, he is right.

Over the years we have seen many great advisors who had both the right clients and the right content to help the families they serve, but did not successfully deliver that content to their clients due to the advisor's lack of confidence and/or facilitation training and skills. Many of them came to us looking for ideas and scripts ("what should I say next?"). Their hope is that the content alone will provide them with success. It doesn't. It only will if all of your clients have "the script" and know what to ask, what to want, and how to answer your questions. And, that doesn't happen.

To be successful you need to be able to weave the content into a meaningful conversation that moves the conversation in the right direction. Hemingway once said that we should never confuse motion with action. Without excellent facilitation training and skills, too often you will hold meetings that do not deliver the desired outcomes of you and/or the participants.

Imagine being so comfortable with yourself and what you're doing that you confidently and easily facilitate any meeting on any topic that creates measurable changes in behavior for the participants because you have advanced facilitation training and skills. This Facilitating Family Communication & Dynamics Program will give you those skills and that confidence.

We have collaborated with Doug Carter, Hyrum Smith and the "3 Gaps" organization, and Vital Smarts and developed a program that will provide both the training and the ongoing resources that will allow you to help your client families thrive.



There are three issues that must be conquered to successfully facilitate families:

1. You must have proven and effective content to provide to the families.
2. You must be a superb facilitator who can both facilitate the delivery of the content in any meeting. And,
3. You must be able to navigate the family dynamic and communication issues that often derail those meetings, and help the family develop the culture necessary to maintain healthy communication, trust and unity over multiple generations. More often than not, these negative family dynamics and conflicts arise when one or more of the parties harboring some beliefs that are inconsistent with the results they want.

This program will provide you with both the facilitation skills and family dynamics/conflict resolution skills and content to help your client families thrive for multiple generations.

This training will be put into the context of family meetings and specifically The Heritage Process. But, the concepts and skills are the same when you are facilitating any family/business/organization/entity meeting.

This program will include three in-person sessions and follow-up materials that will be based on the groups input following our last in-person session. The in-person meetings will be held in Dallas, Texas on:

- January 24-26: The Exceptional Facilitator's Training with Doug Carter
- March 2-3: (as part of our Annual Meeting Week): "3 Gaps" and Franklin Reality Theory training (Hyrum Smith's group), and family meetings.
- March 27-29: Crucial Accountability training with Vital Smarts

Each of these sessions will finish at 5:00 pm, so plan your flights accordingly. We will not be able to accommodate you if you leave early on the last day (and you will disrupt the group).



THE EXCEPTIONAL FACILITATOR'S TRAINING WITH DOUG CARTER

January 24-26, 2017

The Exceptional Facilitator's Training is meant for you.

The goal of this intensive Exceptional Facilitator's Training program is to have you be so comfortable with yourself and what you're doing that you can pick a topic out of a hat, spend 5 to 10 minutes (or less) organizing your thoughts and then conduct an interactive workshop that creates measurable changes in behavior for the participants.

We can't guarantee that you'll be able to do what we just described in every circumstance because no one can predict what might happen in the future. What we ARE saying is you'll have enough understanding of what you're doing to be able to conduct a behavior-changing, interactive workshop that produces positive results and you'll be able to conduct that workshop with minimal time to prepare. Yes that means you can pick a topic out of a hat and in less than 60 seconds take control of the group, identify a topic, generate relevancy, and conduct your training.

It's not a about the content.

We want you to continue to change people's lives simply by the way you guide them along the structure.

It seems that even experienced trainers and facilitators start with wanting to know what to say in order to accomplish a result. The words that are all about what to say actually become the last thing to know once you understand how to build your workshop based on an underlying structure. Content is on the surface of results.

There are three elements to being an exceptional facilitator (in order of importance):

1. YOU being ready to be the exceptional trainer/facilitator;
2. You mastering the concepts and methodology of an exceptional trainer/facilitator; and
3. The content of the facilitation or training

This facilitator training goes beyond words. The first 2 days are about learning and practicing the underlying structure that quickly produces predictable measurable results. The 3rd day is learning and practicing the concepts, skills and tools to help your clients (families, businesses, non-profits, etc.) identify and resolve relationship issues that are hindering their optimal effectiveness.



This is what you get:

- A 4-step process that puts your participants at ease so they willingly participate.
- How to make any subject relevant to your participants.
- The 6 comments that drive a conversation down your desired path.
- Ways to makes what you say more believable and increases your credibility.
- An age old method to increase participation.
- What to do at the beginning of the meeting that enhances participation later in the session.
- The one thing that has to happen to keep their trust.
- An underlying structure that tells you what to do next.
- How to do positive, interruptive coaching by stopping a conversation or action and putting that person back on track without damage or upset.
- A powerful 2-step process that makes your participants recognize the value of what you're doing even if they don't like it.
- How to end a session with the participants wanting more.
- How to identify and resolve conflict amongst participants.

You probably already know some of this. You've been there. You've seen it. You handled it. You're trained. You have a skill set that has most probably been tested and has grown by experience. You trust your intuition whether you call it following hunches or trusting your gut or whatever you call it. You've gotten the job done...and you want more. This training will give you the skills, content, practice and confidence to facilitate nearly any meeting with most content.



“3-GAPS” AND FRANKLIN REALTY THEORY TRAINING AND DEVELOPING SPECIFIC FAMILY MEETINGS

March 2-3 2017

The morning of Session 2 will be presented by a representative of Hyrum Smith’s 3 Gaps organization. Hyrum Smith is the creator of the Franklin Planners and founder of the Franklin Quest company that later became Franklin Covey. Hyrum is also one of the “discoverers” of the Franklin Realty Theory that essentially states that we all have human needs and have all developed a series of principles/beliefs by which we operate. These principles/beliefs lead to rules that create predictable and automatic behaviors. And, our behaviors lead to results. If the results of your behavior do not meet your needs, you have an incorrect principle or belief.

Over the years, Hyrum and his group determined the 3 Gaps that most often lead to results that do not meet our needs. These gaps are:

The Values Gap - learning how to do the things you value—that are central or core to who you are and what you want to accomplish in life.

The Beliefs Gap - everyone (individuals and organizations) needs to pay more attention to the effect your beliefs have on the results you’re getting. If you are failing to get the results you need, you need to understand there’s a gap between what you believe and what you need. Closing that gap—between what you currently believe and the beliefs that will meet your needs – is essential to success.

The Time Gap - (the events that make up your day) and the effort to plan for that day directly impacts your productivity. Too many people are busy without being productive because there is a gap between their goals and how they’re investing their time.

This first part of this session will be a 4-hour intensive training by the 3-Gaps folks that will talk about the Franklin Realty Theory, the 3-Gaps, and what changes when we close the 3-Gaps.

This training is based on the bestselling book, *The 3 Gaps—Are You Making a Difference*. During the session, we teach us how to better live our values, challenge our beliefs and create plans that are clearly linked to our individual and organizational success. As a result, people are happier, have more energy to put into positive goals, and are more productive.



The key messages that will come from this session are:

- Everyone has a basic desire to make a positive difference at home and at work.
- Increased engagement and reduced friction result when individuals close the gaps in their lives.
- There is an important link between motivation and individual values, beliefs and goals.

This training was developed by 3 Gaps for business organizations, and will be taught in the context of working with families.

During the afternoon of March 2nd and all March 3rd will connect and combine the materials from Doug Carter and this session and develop models for providing these concepts to families. As we all know, our ultimate goal is to help the family become a multi-generational high performance team.

We will accomplish that by creating two family meetings that will implement what you have learned. By the end of this session, you will have actually applied what you learned in the first two session, and be ready to implement the concepts immediately.



CRUCIAL ACCOUNTABILITY TRAINING FROM VITAL SMARTS

March 27-29, 2017

The first two days of training for this session will be provided by the Vital Smarts folks and is based on the ***Crucial Accountability*** book. It is designed to help you improve accountability, execution and performance in the families you serve.

A family with a culture of weak accountability is one where those who see problems say nothing because they assume they don't have authority or skills to raise a concern. Their portion of this session will teach a straightforward, step-by-step process for identifying and resolving performance gaps, strengthening accountability, eliminating inconsistency, and reducing resentment. It uses video, group discussions, skill practice, and real-life application, so it will be both entertaining and engaging.

This training will provide a methodology for effectively holding others accountable that is based on more than 25 years of research. The key points are:

- **Hold anyone accountable:** no matter the person's power, position or temperament.
- **Master performance discussions:** to get positive results and maintain good relationships.
- **Motivate others without using power:** clearly and concisely explain specific, natural consequences, and permanently resolve problems.
- **Manage projects without taking over:** creatively help others avoid excuses, keep projects on track, and resolve performance barriers.
- **Move to action:** agree on a plan, follow-up, engage in good report practices, and manage new expectations.

Again, their typical training is done for organizations and businesses. We will spend the third day working on how to provide this training and these concepts to families.

We will spend the afternoon of March 29th identifying and reviewing the support materials you need to most effectively and efficiently integrate all of this training and facilitate the creation of a culture of communication, trust and unity in the families you serve.



Enrollment in this program will be on a first come, first served basis. The fee for this program and the follow-up materials is as follows:

- \$14,212.50 for HDPs who register on or before November 1, 2016
- \$16,720.50 for non-HDPs who register on or before November 1, 2016
- \$18,220.50 for anyone registering after November 1, 2016.

Because this is very intensive and interactive training, attendance is limited to 15 participants.



FACILITATING FAMILY COMMUNICATION & DYNAMICS PROGRAM

Name: _____ Date: _____

Company: _____

Business Address: _____

Telephone: _____ Email: _____

This is a three (3) session program: January 24-26, 2017, March 2-3, 2017 and March 27-29, 2017. All sessions will be held in Dallas, Texas. I understand and agree that there is no refund or credit for withdrawal from the program or missed sessions.

The fee for this Training \$16,720.50. You may pay a \$1,000.00 initial payment with this application and the balance due on or before January 6, 2017. The "First Adopter" Registration fee is \$14,212.50 for Heritage Design Professional™ (HDPs) and \$15,212.50 for non-HDPs if this Application is received and paid in full on or before September 30, 2016. The Early Registration Fee is \$14,712.50 for HDPs in good standing and \$15,712.50 for non-HDPs if this application and initial payment are received on or before September 30, 2016. A late registration penalty of \$1,000.00 will be added for all Applications received after December 1, 2016

Please initial all that apply:

I am an HDP _____ paying in full or _____ paying a \$1,000.00 initial payment

I am not an HDP _____ paying in full or _____ paying a \$1,000.00 initial payment

_____ **Enclosed is my check** _____ **Please contact me for direct payment information**

_____ **Please charge my (Circle One):** Visa Mastercard

The Heritage Institute is authorized to immediately charge my card for the amount due described above.

Card Number: _____ Expiration Date: _____ SCV Code: _____

Card holder's name as it appears on the card: _____

Billing address: _____

Signature: _____ Date: _____