

## VALUES, MYTHS AND RULES

### Values Often Found in Successful Business Families<sup>1</sup>

VALUE	DEFINED	HAVE Y/N	WANT Y/N
Accountability	Responsible and answerable for actions	<input type="checkbox"/> / <input type="checkbox"/>	<input type="checkbox"/> / <input type="checkbox"/>
Adding Value	Making a difference, contribution	<input type="checkbox"/> / <input type="checkbox"/>	<input type="checkbox"/> / <input type="checkbox"/>
Collective Good	When situation pits individual needs against what's best for everyone, the collective welfare will prevail	<input type="checkbox"/> / <input type="checkbox"/>	<input type="checkbox"/> / <input type="checkbox"/>
Valuing Input and Interaction [give and take]	Process of sharing in a decision embraces and empowers people and makes them believe that their ideas are important.	<input type="checkbox"/> / <input type="checkbox"/>	<input type="checkbox"/> / <input type="checkbox"/>
Education and Development	Continuous skill-building and inter-personal improvement	<input type="checkbox"/> / <input type="checkbox"/>	<input type="checkbox"/> / <input type="checkbox"/>
Ethical Conduct	Preservation of reputation, integrity and honesty in action and compliance	<input type="checkbox"/> / <input type="checkbox"/>	<input type="checkbox"/> / <input type="checkbox"/>
Focus on Values and Values Education	Naming and planning [cultivating] to exercise shared values in the world;	<input type="checkbox"/> / <input type="checkbox"/>	<input type="checkbox"/> / <input type="checkbox"/>
Fun	Incorporate curiosity, creativity and nonconformity into social interaction	<input type="checkbox"/> / <input type="checkbox"/>	<input type="checkbox"/> / <input type="checkbox"/>
Justice	Fair, but not necessarily equal, proper order of things/people	<input type="checkbox"/> / <input type="checkbox"/>	<input type="checkbox"/> / <input type="checkbox"/>
Meritocracy	Responsibility and appointments are made/given based on demonstrated talent and ability [competence]	<input type="checkbox"/> / <input type="checkbox"/>	<input type="checkbox"/> / <input type="checkbox"/>
Openness	Transparency and sharing of information, embracing of others and ideas; with boundaries [privacy but not secrecy]	<input type="checkbox"/> / <input type="checkbox"/>	<input type="checkbox"/> / <input type="checkbox"/>
Practical Realism	Keep your eye on the ball and be alert to changing environments	<input type="checkbox"/> / <input type="checkbox"/>	<input type="checkbox"/> / <input type="checkbox"/>
Risk-taking	Manage risk and control what is possible; take advantage appropriate opportunities and experiences	<input type="checkbox"/> / <input type="checkbox"/>	<input type="checkbox"/> / <input type="checkbox"/>
Self-reliance	Hard work, initiative, self-discipline, independent; follows own instincts and ideas	<input type="checkbox"/> / <input type="checkbox"/>	<input type="checkbox"/> / <input type="checkbox"/>
Servant Leadership	Higher value on helping others or groups achieve, especially with respect to shared goals	<input type="checkbox"/> / <input type="checkbox"/>	<input type="checkbox"/> / <input type="checkbox"/>
Social Purpose	Improve society, do no harm, goodwill in community, with staff, suppliers and the like; make a meaningful difference	<input type="checkbox"/> / <input type="checkbox"/>	<input type="checkbox"/> / <input type="checkbox"/>
Entrepreneurial Spirit	Innovative and energetic practice to identify or create and opportunity	<input type="checkbox"/> / <input type="checkbox"/>	<input type="checkbox"/> / <input type="checkbox"/>
Stewardship	Attitude towards ownership of taking personal responsibility for leaving resources better than they were when they came under your watch.	<input type="checkbox"/> / <input type="checkbox"/>	<input type="checkbox"/> / <input type="checkbox"/>
Trust	Assured comfort in the integrity, congruence, shared values, commitment and friendship of another	<input type="checkbox"/> / <input type="checkbox"/>	<input type="checkbox"/> / <input type="checkbox"/>
Valuing Stakeholders	Mutuality with respect to suppliers, staff, investors, associates, customers and the like	<input type="checkbox"/> / <input type="checkbox"/>	<input type="checkbox"/> / <input type="checkbox"/>

<sup>1</sup> As developed by Pervin – see files

**Exploring Your Business Family Myths<sup>2</sup>**

How does knowing your business family mythology help? Recognizing how your business family myths help or hinder your positive thoughts, mood and behaviour often leads to an examination of your core beliefs. Ultimately, this awareness affords choice, and the ability to enact change.

Every business family has its own set of messages. These unspoken expectations, patterns and assumptions, which are not necessarily obvious, are imbedded in every action. These messages, patterns, expectations and assumptions frequently describe how relationships should work, what people owe each other, what is allowed, what is taboo, how the family operates, what is important, and what the family stands for. These myths may be invisible to the employees, but the family is aware of them and business behaviour can only be understood when the family mythology is understood.

Family myths often lead to misunderstandings and conflict. Many myths are assumptions that individuals make about what they can expect and what is fair in the family. But each person may interpret them differently. There is no hurt deeper than the sense that a family member has betrayed a core family myth or value.

Examples of common family myths that may be transferred into a business include:

- The business will always take care of all family members.
- Everyone in the family is treated equally, in or out of the business.
- You don't have to work all the time to operate a good business.
- Our business success proves we're a good family.
- Leaving the business is as bad as leaving the family.
- The next generation shouldn't have a feud that divides the family and the business.
- The business should never be sold.
- The family agrees on everything.
- You can do whatever you want.
- Women must support the activities of the men.
- If we don't have the business, we don't have a family.
- It's not safe to let people know who you are.
- Unspoken expectations help keep the peace.

For each family myth, it is often helpful to list some of its positive and negative effects on your family, business and shareholder group.

Some myths will have to do with the core values of the family, its' meaning, what it stands for. Others, upon reflection, will be seen to have outgrown their usefulness, or may be questionable. These are the usually ones that need to be explored deeply.

Myth	Positive/negative or advantage/disadvantage effect

<sup>2</sup> Original work as developed by Dennis Jaffe, *Working With the Ones You Love*



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### Exploring Your Business Family Rules<sup>3</sup>

Take a few moments and think about how your family manages the tasks of intimacy, dependency, power, independence, and growth. What did your family do to help you meet each of these needs at different stages of your life? Is there one area where your family communicated a negative or mixed message? Was it not OK to grow up, or depend on each other, or have power?

Now think about how each of these areas is expressed or defined in your family business. Write down your thoughts.

Describe your family rules in the following areas:

What makes for a close family	
How we act when we're together	
What we never do	
How we behave in public	
How we behave in private	
What we never discuss	
What we consider important	
What we always discuss, but never resolve	
How we treat our elders	
How close family members act	
What is private and what is shared	
Who gets to interrupt others	
How we deal with differences of opinion	
What do we find threatening	
What women do	
What men do	
How do we work	
What we do when we are hurt or upset	
What is allowed	
What is taboo	
How we deal with anger	
How we use the "golden rule"	
How we deal with entitlement	
How we deal with safety	

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<sup>3</sup> Original work as developed by Dennis Jaffe, *Working With the Ones You Love*

**A Few Unspoken Rules that Possibly Shape your Business Life<sup>4</sup>**

RULE	DEFINITION	FITS/DOESN'T FIT
1. Confusion Rule	No dominant definition of what is the real problem – and defining it is part of the ongoing battle.	<input type="checkbox"/> / <input type="checkbox"/>
2. Dependency Rule	Reliance on Dad is required to receive his/her approval.	<input type="checkbox"/> / <input type="checkbox"/>
3. Loophole Rule	Things that could produce change evoke immediate threats.	<input type="checkbox"/> / <input type="checkbox"/>
4. Distraction Rule	Any attempt to focus gets derailed by other problems.	<input type="checkbox"/> / <input type="checkbox"/>
5. Entitlement Rule	Attempts by anyone to take away divine right privileges, influence and rewards are met with hostility and/or avoidance.	<input type="checkbox"/> / <input type="checkbox"/>
6. Ambush Rule	Attempts to connect and share are confused with provocative and confrontational interventions under the guise of ...learning or helping [and is sometimes combined with a seagull management style].	<input type="checkbox"/> / <input type="checkbox"/>
7. Past Rule	Attempts to deal with current problems are defeated by assumptions that the “real” problem is in the past.	<input type="checkbox"/> / <input type="checkbox"/>
8. Identity Rule	The business consumes my life, no matter how hard I attempt to change it.	<input type="checkbox"/> / <input type="checkbox"/>
9. Enmeshed Rule	Attempts to separate contribution, management and ownership are met with resistance because it's too personal.	<input type="checkbox"/> / <input type="checkbox"/>
10. Lifer Rule	No one receives their legacy prior to death – if they do [see entitlement rule], then there are strings attached.	<input type="checkbox"/> / <input type="checkbox"/>
11. Success Rule	If the business is successful then I must have innate talent [the reverse applies too!].	<input type="checkbox"/> / <input type="checkbox"/>
12. Closeness Rule	It is unsafe to get close emotionally so fighting [mostly passive aggressive] maintains the required safe distance to protect my needs, priorities and me.	<input type="checkbox"/> / <input type="checkbox"/>
13. Wellness Rule	Maladaptive and destructive behaviours are allowed to thrive in an attempt to maintain and preserve family harmony.	<input type="checkbox"/> / <input type="checkbox"/>
14. Knowledge Rule	Individual past activities and experiences are the badge of courage, learning is a personal and information is not forthcoming which adversely affects everyone and the business [and leads to learned incapacity].	<input type="checkbox"/> / <input type="checkbox"/>
15. Leadership Rule	The top job is maintained by a sustained determination to isolate would-be competitors.	<input type="checkbox"/> / <input type="checkbox"/>
16. Harmony Rule	Any attempt to sustain harmony is countered by habitual anger.	<input type="checkbox"/> / <input type="checkbox"/>
17. “My Way” Rule	Little attempt is made for permission, and apology and forgiveness is not easily performed.	<input type="checkbox"/> / <input type="checkbox"/>
18. Power Rule	Any attempt to make things better or change is seen as an attempt to gain control over others and is resisted.	<input type="checkbox"/> / <input type="checkbox"/>
19. Rigidity Rule	Attempts to consider alternate ways of acting and/or doing are rejected as inappropriate.	<input type="checkbox"/> / <input type="checkbox"/>
20. Sacrifice Rule	My life is my work in order that the family may benefit.	<input type="checkbox"/> / <input type="checkbox"/>

<sup>4</sup> As developed by Pervin – see files



## VALUES, MYTHS AND RULES

### A Few Myths that Possibly Shape your Business Family Life<sup>5</sup>

MYTH	FITS/DOESN'T FIT
1. The business will always take care of all family members.	<input type="checkbox"/> / <input type="checkbox"/>
2. The business will make us respectable.	<input type="checkbox"/> / <input type="checkbox"/>
3. The business can support everyone in the family.	<input type="checkbox"/> / <input type="checkbox"/>
4. Everyone in the family is treated equally, in or out of the business.	<input type="checkbox"/> / <input type="checkbox"/>
5. The leader of the business is the leader of the family.	<input type="checkbox"/> / <input type="checkbox"/>
6. Our business success proves we're a good family.	<input type="checkbox"/> / <input type="checkbox"/>
7. Every son or daughter has a job waiting in the business.	<input type="checkbox"/> / <input type="checkbox"/>
8. You can do whatever you want as long as _____ agrees.	<input type="checkbox"/> / <input type="checkbox"/>
9. The business should never be sold.	<input type="checkbox"/> / <input type="checkbox"/>
10. If we don't have the business, we don't have a family.	<input type="checkbox"/> / <input type="checkbox"/>
11. It's not safe to let people know who you are.	<input type="checkbox"/> / <input type="checkbox"/>
12. Never disagree with _____, who is responsible for creating this wonderful business.	<input type="checkbox"/> / <input type="checkbox"/>
13. The family is able to agree on everything.	<input type="checkbox"/> / <input type="checkbox"/>
14. Since we're so successful, we don't need to change.	<input type="checkbox"/> / <input type="checkbox"/>
15. The more money we receive, the more we are loved.	<input type="checkbox"/> / <input type="checkbox"/>
16. Talent and success are inappropriately linked.	<input type="checkbox"/> / <input type="checkbox"/>
17. Your idea here	<input type="checkbox"/> / <input type="checkbox"/>

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<sup>5</sup> Repeat of Dennis Jaffe work