



Crossroads

live case scenario

Jack has built a successful closely-held business. His two grown children Carrie and Johnny work for the business. Carrie learned much at business school and is eager to try out her wings. Johnny, the only son, strolls into work late every day and believes his father hates him. Eleanor and Frank are loyal employees have worked at the company for over 30 years. They have watched the business grow and change. Eleanor, the office queen bee fears Carrie's big plans won't include her. Jack has been thinking of retirement due to a number of personal reasons and has some hard decisions to make about the future of his business.

"Your live case demonstrated what every family business struggles with. Your replays of situations showed dramatically the challenges we face selling to family businesses. Thanks for making the challenge come alive."

Vice President, Private Financial Services, Major Financial Services Company

There's a possibility the company may be sold or the children may take over the business. Each child lobbies their father for the opportunity to run the company. Their methods create tension for everyone at the business. Jack throws up his hands and says he should just sell the place. Carrie threatens to go work for their biggest competitor. The play ends with Jack and his two children at a loss for how to proceed. Where will they head from here?

learning objectives

- Introduce the unique dynamics of selling services to a closely-held businesses
- Uncover opportunities for recommending services to a net-worth individual(s)
- Closely-held businesses demand consideration of each family member
- Understanding the emotional dynamics is the key to a successful solution
- Jumping to close a sale too soon will reduce the chance of a close

program format suitable for

Standard or talk show format

- Meetings
- Training Seminars
- Conventions
- Retreats
- Luncheons
- Dinners