

## CASE STUDY | Gamma Ray, Inc.

### Situation

**Family:** A Father in his 60's and two sons in their 30's, both active in the business. Father founded it in 1984.

**Business:** A successful, medium-tech manufacturing business.

**Ownership:** The Father had stated, historically, that he wanted to be proactive about succession but, other than transferring some stock, he'd not taken steps to designate or develop a successor or to stage transfer of ownership.

**Crises:** Sons were quite frustrated that Dad had not "walked the talk" about succession. Both have been in sales roles at a VP level.

**Leadership:** Both sons needed to be assessed and consulted regarding their fit with, potential for, and desire for the successor role. We discover that one, though, is technically oriented, and one has a "leadership urge."

**Core Issue:** The Dad (Owner) had simply been avoiding the situation because of his own anxiety over having to designate one son over the other, and how this would affect family relationships. The boys had never spoken of the issue either.

**Not Happening:** Accountant and lawyer were being blocked from scripting the ownership and business transfer strategy, as a result of the Human Factors obstacles.

### Solutions

- We first conducted a series of interviews with the family members (Dad, Mom, and the boys) and with key non-family managers and individual contributors.
- In conjunction with the interviews, we administered our web-enabled assessment survey which serves to evaluate the company on the 12 drivers of FOB performance and to evaluate it against research-based norms.

- Between the interviews and more formal assessment of each of the sons, it became clear (both to us and to the sons) which one was better suited to succeed his father.
- These assessments also led to designing a development plan and a coaching process for both sons, as we proactively readied them for their future roles.

### Results

- We facilitated a Strategic Advance to refine Gamma's Vision/Mission/Core Values (V/M/CV) and help them crystallize a going-forward business strategy.
- Father no longer had anxiety about the Big Decision.
- All the negative energy generated by Dad's procrastination and indecisiveness dissipated; harmony was restored.
- They were "allowed" to enter next phase of "growing up."
- They were charged with taking control of their development and preparation for the future.
- The power of a V/M/CV articulated a set of goals to supercharge both individual and corporate performance and performance targets.