WORKING MATERIAL 1.7 · CHAPTER 1 — THE VISION OF OWNERSHIP · SETTING: LUANG PRABANG, LAOS

Family and Leadership: Who Decides in a Family Business

Source: Francesco Dore, The Helm and the Lens, Volume 9a — The Small Property, subchapter 1.7 (book page 93)

GUIDING QUESTION

If the bank rang tomorrow, who in your family would take the call, and who would be allowed to say yes? And would your staff know whom to ask when two of you tell them different things?

1 · Verification Pact: market claims against the standard

Copied from the book. The last column is for your property: what holds here, and how you know it.

What is claimed	Binding?	What actually holds	In our property
Top management is always a single person	No	It is the person or group directing and controlling at the highest level	
In a family business the owner decides, and that is enough	Only partially true	Roles, responsibilities and authorities must be assigned and communicated (5.3)	
A policy is a long document	No	Content is required, not length (5.2)	
You cannot manage without a quality manager	No	Clause 5.3 requires tasks to be assigned, not a dedicated post	
The management review is a formal meeting with a set template	No	Planned intervals are required; form, attendance and minute format are free (9.3)	
The bank is an interested party	Only partially true	The ISO handbook gives banks as an example; the house determines which parties are relevant (4.2)	

2 · Common mistakes — a self-check

Tick each mistake you recognise in your own property, and note where it shows.

☐ Avoiding the leadership question to keep the peace; the dispute comes anyway, at an investment or a sickbed.

☐ Making decisions in the corridor, where those absent never hear and those present remember differently.

☐ Leaving roles from habit unwritten.

☐ Judging quotes by the person who obtained them.

☐ Treating succession as a date rather than a plan.

☐ Giving staff different answers to the same question.

☐ Believing the standard demands a single head.

☐ Leaving the bank and family members outside the business off the list of interested parties.

3 · A Checklist for Leadership in a Family Business

The book's checklist, with a column for your own answer.

Question	Why it matters	Our answer
Is it written down who leads the house, person or group?	Every duty in clauses 5 and 9.3 is addressed to top management	
Does each role have a responsible person, a deputy and a signing limit?	Roles from habit have no boundaries	
Does each legal duty have a named person in the house?	A duty on an unappointed person hangs on habit	
Is there an agreed statement of purpose?	Without a yardstick, quotes are judged by who obtained them	
Does the family council meet at set intervals with an agenda and minutes?	Clause 9.3 requires planned intervals and retained outputs	
Is succession a standing item with steps and dates?	A handover without a plan convinces neither bank nor staff	

4 · What would show this is working

Questions drawn from the subchapter's reading of the standards and its practical application. Clause numbers in brackets point to the harmonized structure or the standard the subchapter names; where the evidence lives, and the sheets named, are this book's method, not a requirement of any standard.

Question	Where the evidence lives	Seen?
Is top management named on a sheet, with areas, deputies and signing limits?	The leadership sheet, with a transition date where a handover is planned	☐
Has each legal duty been assigned to a named person, rather than to whoever usually does it (5.3)?	The role sheet; the obligations list's holder column	☐
Is there an agreed policy or statement of purpose, posted and communicated (5.2)?	The posted sheet in the office	☐
Does the family meet at planned intervals with a standing agenda (9.3)?	The dates of the family council in the calendar	☐
Are decisions retained with decision, owner and date (9.3)?	One page of minutes per meeting	☐
Is succession a standing item with steps and dates?	The agenda and the minutes	☐

> *What this sheet is not: no management-system standard prescribes this form, and filling it shows conformity with nothing. It is a working aid drawn from the book; the standards' own texts govern the real case, and legal duties are established with competent local expertise. Independent material; not affiliated with or endorsed by ISO or any certification, accreditation or scheme-owning body. The standards' own texts prevail; legal duties must be confirmed locally.*