

ONIDA
FAMILY ADVISORS

# LEADERSHIP DEVELOPMENT FRAMEWORK

## Intro and Philosophy

Leadership in a family enterprise is not a moment—it is a structured process over time.

Most families wait until the next generation is “ready.” In practice, readiness is built through:

- Structured exposure
- Guided reflection
- Real responsibility

This process is designed to develop:

| **Clarity** | **Capability** | **Confidence** |
| --- | --- | --- |
| *(who I am)* | *(what I can do)* | *(how I show up)* |



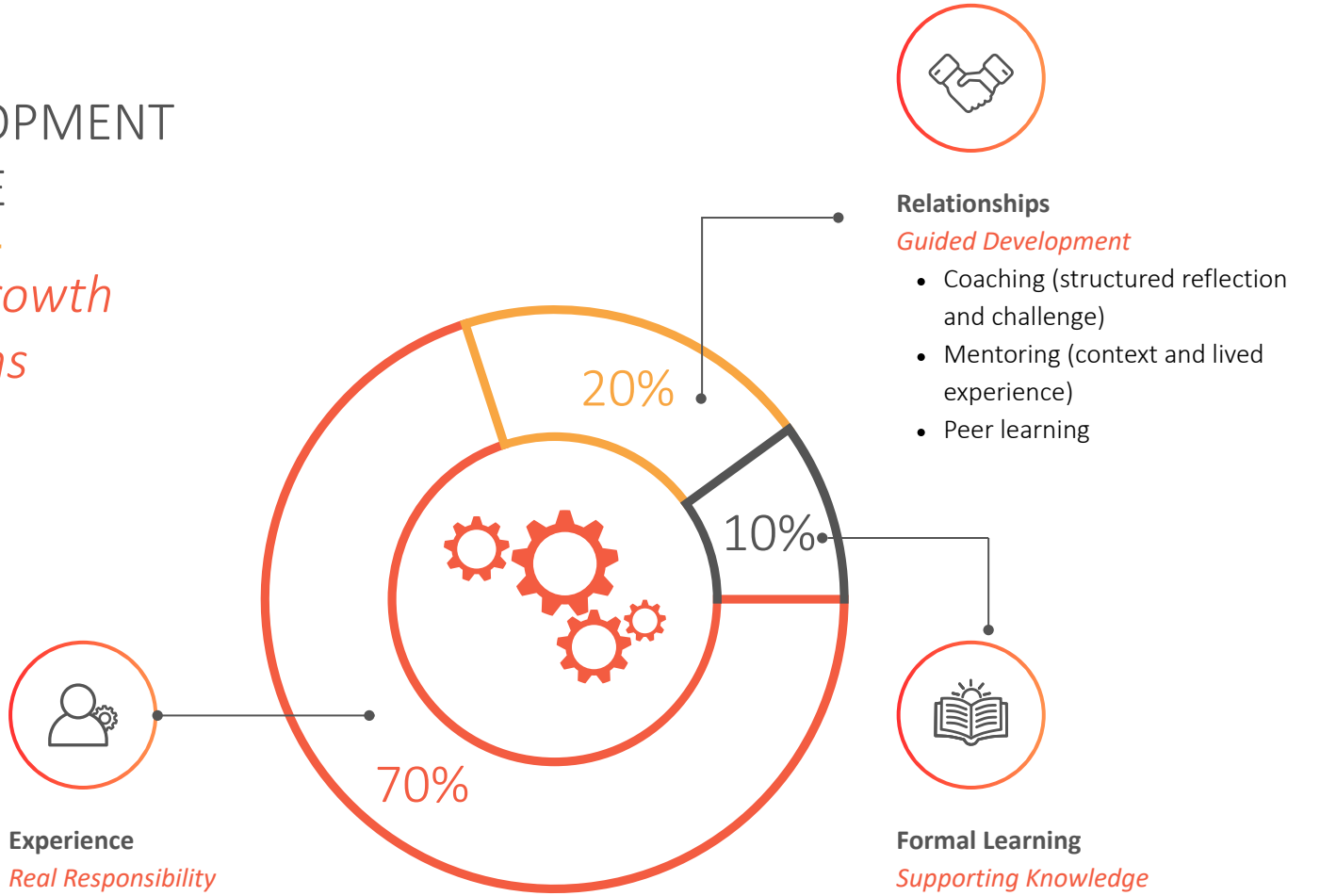
# THE DEVELOPMENT JOURNEY (WHAT YOU WILL EXPERIENCE)

| PHASE | PHASE 1: FOUNDATION<br>PURPOSE, CONTEXT & IDENTITY | PHASE 2: CLARITY<br>GOALS & DEVELOPMENT PLAN | PHASE 3: DEVELOPMENT<br>EXPERIENTIAL LEARNING | PHASE 4: INTEGRATION<br>OWNERSHIP & STEWARDSHIP |
|---|---|---|---|---|
| **What happens in this phase:** | • Personal discovery session (values, motivations, leadership style)<br>• Review of family enterprise context (structure, roles, expectations)<br>• Leadership assessment (e.g. strengths, style, preferences)<br>• Light 360 feedback or stakeholder conversations<br>• Initial conversation with a family leader to align expectations | • Define 2–4 clear leadership development goals<br>• Map potential future roles (owner, board, executive, etc.)<br>• Identify key capability gaps<br>• Build a personalized Leadership Development Plan (LDP) including:<br>• Development experiences<br>• Mentors / coaches<br>• Learning priorities<br>• Introduction to core concepts in family governance and stewardship | • Participation in real-world experiences such as:<br>  ◦ Governance meetings (observer → contributor)<br>  ◦ Project ownership (business, philanthropy, investment)<br>• Live coaching on real situations (e.g. board prep, family discussions)<br>• Ongoing feedback from:<br>  ◦ Coach<br>  ◦ Mentors<br>  ◦ Family leaders<br>• Optional mentorship pairing (family + external) | • Increased responsibility in governance or enterprise roles<br>• Leading initiatives or contributing to strategic decisions<br>• Reflection on leadership identity and long-term role<br>• Final review conversation with a family leader<br>• Transition planning (next roles, peer networks, continued development) |

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|---|---|---|---|---|
| **What the next gen gains:** | • Clarity on personal identity vs family expectations<br>• Understanding of how the family enterprise works<br>• Awareness of strengths and development areas | • A clear direction and sense of purpose<br>• A structured roadmap for development<br>• Alignment between personal ambition and family context | • Practical leadership experience<br>• Confidence in real conversations and decisions<br>• Ability to navigate complexity and relationships | • Confidence as a contributor, not just a participant<br>• Clarity on long-term role and pathway<br>• Ability to lead with credibility across generations |
| **Competency Focus & Progression:** | • Self-Awareness & Identity → Emerging → Developing<br>• Purpose, Context & Stewardship → Emerging → Developing<br>• Ownership Mindset → Passive → Aware | • Ownership Mindset & Responsibility → Developing<br>• Governance Understanding → Emerging → Developing<br>• Strategic Thinking → Emerging | • Governance Behaviour → Developing → Established<br>• Judgement & Decision-Making → Developing<br>• Collaboration & Relationships → Developing → Established<br>• Financial & Business Fluency → Developing | • Judgement & Decision-Making → Established → Steward<br>• Ownership Mindset → Established → Steward<br>• Legacy & Continuity Thinking → Developing → Established<br>• Leadership Presence → Established |
| **Typical Development Experiences:** | • Complete assessments and structured reflection<br>• Attend and observe family discussions<br>• Build understanding of enterprise structure and decision-making | • Define development goals and success measures<br>• Identify mentors and support network<br>• Map future roles and ownership pathways | • Prepare and contribute in governance meetings<br>• Lead projects or initiatives<br>• Analyse and present options on real decisions<br>• Receive structured feedback on contribution and judgement | • Lead governance discussions or initiatives<br>• Take ownership of defined decisions<br>• Contribute to long-term strategic thinking |

# THE DEVELOPMENT ENGINE

## *How Growth Happens*




**Relationships**

*Guided Development*

- Coaching (structured reflection and challenge)
- Mentoring (context and lived experience)
- Peer learning

**Experience**

*Real Responsibility*

- Projects, governance participation, decision-making
- Gradual increase in scope and accountability

**Formal Learning**

*Supporting Knowledge*

- Governance, finance, strategy
- Leadership and communication

# GOVERNANCE AS CLASSROOM

- **Next gens attend governance forums with a defined role:**
  - Observer → contributor → decision-maker
- **They prepare for discussions (briefs, questions, analysis)**
- **They receive feedback on:**
  - Thinking
  - Contribution
  - Judgment

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**Examples:**

- Presenting a recommendation to a family council
- Leading a small initiative or decision
- Writing a short reflection on a key decision

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**Why this matters:**
Governance becomes:

- Not just where decisions are made
- But where leaders are developed

# CLOSING

Leadership development in a family enterprise is not about preparing individuals for a role—it is about building the judgment, capability, and mindset required to steward across generations.

This process moves individuals from:
**Awareness → Contribution → Stewardship**

The Owner Competency Map provides the companion framework—defining what effective ownership looks like, and how capability develops over time.

Together, they ensure that progression into leadership and governance roles is based not on assumption, but on demonstrated capability, contribution, and trust.

Ultimately, the goal is simple:

**To prepare the next generation not just to step in—but to contribute, lead, and steward with confidence and credibility.**