CORE
CONCEPT

Family Business Succession Planning: Leadership and Ownership Transition

26 – 30 April 2027
Dubai - Five-star CBD venue

Family Business Succession Planning: Leadership and Ownership Transition

Ref: 1292_8018 **Date:** 26 – 30 April 2027 **Location:** Dubai - Five-star CBD venue **Fees:** 19500 SAR

Technical depth: Conceptual · **Practical mode:** Case study

Introduction

Few family enterprises survive into the third generation, and a poorly handled transfer of leadership or ownership is among the most common reasons. Founders postpone the decision, families avoid the conversation, and successors are chosen late, on birth order rather than capability, with no plan for ownership or for the incumbent's next role. This Core Concept course equips owners and directors to plan leadership and ownership succession as a structured, multi-year process. Participants examine transitions across sectors and generations and leave with a Family Business Succession Roadmap for their own enterprise.

Course Objectives

- Distinguish leadership, ownership and governance succession and judge an enterprise's readiness for each
- Evaluate succession options, including a family successor, a non-family chief executive and a sale, using recognised succession models
- Set selection criteria and oversee the assessment and development of potential successors
- Weigh ownership transfer instruments and share allocation choices against family fairness and business continuity
- Put in place emergency succession arrangements for the sudden loss of a key leader
- Direct the preparation of a Family Business Succession Roadmap for the family and the board

Target Audience

- Founders and controlling owners planning their own transition
- Chairs and board members overseeing leadership continuity in family-controlled companies
- Family council members responsible for succession and ownership policy
- Senior family and non-family executives involved in transition planning
- Senior legal, tax and wealth advisers to business families

Course Outline

Day 1: Succession in the Family Enterprise

- Succession Failure Patterns and Lansberg's Succession Conspiracy
- Leadership, Ownership and Governance Succession as Three Distinct Transitions
- Gersick Developmental Stages: Controlling Owner, Sibling Partnership and Cousin Consortium
- Sonnenfeld Departure Styles: Monarch, General, Ambassador and Governor
- Succession Readiness Assessment Scorecard

Day 2: Succession Models and Options

- Le Breton-Miller, Miller and Steier Integrative Succession Model
- Handler Mutual Role Adjustment Model for Incumbent and Successor
- Carlock and Ward Parallel Planning Process Applied to Continuity
- IFC Family Business Governance Handbook Guidance on Succession Policy
- Succession Options Matrix: Family Successor, Non-Family Chief Executive, Sale or Listing

Day 3: Selecting, Developing and Transferring

- Successor Selection Criteria and Leadership Competency Profile
- Candidate Assessment Using 360-Degree Feedback and Assessment Centres
- Successor Development Plan: Job Rotation, Mentoring and Outside Experience
- Ownership Transfer Instruments: Holding Structures, Trusts and Buy-Sell Agreements
- Business Valuation for Intra-Family Share Transfer: DCF and Market Multiples

Day 4: Succession Risks and Difficult Cases

- Emergency Succession Plan for the Sudden Loss of a Leader
- Fairness Versus Equality in Share and Estate Allocation
- Liquidity Mechanisms for Inactive Heirs and Minority Shareholders
- Incumbent Transition Role Charter: Chair, Mentor or Ambassador
- Succession Risk Register and Contingency Triggers

Day 5: Case Work and the Succession Roadmap

- Founder-to-Sibling Transition Case Study
- Non-Family Chief Executive Appointment Case Study
- Succession Options Appraisal for an Own Family Enterprise
- Family Business Succession Roadmap Drafting
- Family Council Presentation Rehearsal and Peer Review

Skills You Will Gain

- Succession Readiness Assessment
- Successor Evaluation
- Ownership Transfer Planning
- Emergency Succession Planning
- Intergenerational Negotiation
- Equitable Wealth Allocation
- Transition Governance
- Leadership Continuity Oversight

Why Attend This Course

- Return with a Family Business Succession Roadmap that sets out who, when and how, ready to present to the family and the board
- Open the succession conversation with the senior generation using a structure rather than a confrontation
- Avoid the ownership and fairness decisions that most often divide families after a transition
- Hear how owners from other sectors and countries have handled their own transitions

Conclusion

Succession is a process that takes years, not an event that happens when a founder steps down. This course moves from the patterns behind failed transitions, through the principal succession models and options, to successor selection and development, ownership transfer and valuation, and the emergencies and fairness disputes that derail many plans. The final day turns that material into a Family Business Succession Roadmap that participants take back to their family and board as the basis for an orderly handover.