

# Family Business Satisfaction Survey



How satisfied are you with how your family and business are functioning? If you have any concerns, our free Satisfaction Survey may serve to focus your thoughts and, perhaps, help start a process to make things better. If you respond quickly and don't think too hard about justifying your answers It should only take around 10 minutes to complete.

Section 1 (in 4 parts) covers Family Fundamentals – things that should be documented, in place and working well for your family.

Section 2 (in 2 parts) covers Meetings, Processes and Skills – human activities, and the way they're carried out, within your family.

## Section #1: Family Fundamentals

Questions (1) and (2) require a “Yes” or “No” response. Question (3) requires an evaluative, scored response.

- If you answer “No”, score (0). This is something you may need to help make happen.
- If you answer “Yes”, score your sense of satisfaction with how things have been done / are working, between (1) and (3).

*Score guide: (1) = not happy; (2) = just OK; (3) = happy & satisfied.*

Section #1: Family Fundamentals		Yes / No	Sense of Satisfaction			
1. Family Values, Vision, Mission and Goals			(0)	(1)	(2)	(3)
1.	Do you have written Family Values, Vision & Goals?	Y / N				
2.	Were you involved in setting / agreeing them?	Y / N				
3.	How appropriate and effective are they for your family?					

<b>Section #1: Family Fundamentals</b>		<b>Yes / No</b>	<b>Sense of Satisfaction</b>			
<b>2. Family Plans</b>			(0)	(1)	(2)	(3)
1.	Do you have written, long term Family Plans?	Y / N				
2.	Were you involved in developing them?	Y / N				
3.	How appropriate and effective are they for your family?					
<b>3. Family Rules, Policies and Procedures</b>			(0)	(1)	(2)	(3)
1.	Do you have written family policies?	Y / N				
2.	Were you involved in developing / reviewing them?	Y / N				
3.	How comprehensive, appropriate and effective are they for your family?					
<b>4. Family Code of Conduct</b>			(0)	(1)	(2)	(3)
1.	Do you have a Family Code of Conduct?	Y / N				
2.	Were you involved in developing / reviewing the Code?	Y / N				
3.	How appropriate and effective are they for your family?					

**Section #2: Family Meetings, Processes and Skills**

This section focuses on family meetings, processes and skills: *Score guide: (0) = not at all; (1) = not well; (2) = just OK; (3) = we do things very well.*

<b>Family Processes and Skills</b>		<b>Yes / No</b>	<b>Sense of Satisfaction</b>			
<b>5. Family Meetings</b>			(0)	(1)	(2)	(3)
1.	Does your family hold regular family meetings?					
2.	Do you participate in those meetings?					
3.	Do you have formal rules and procedures for your meetings?					
4.	How useful and effective are your family meetings?					
<b>6. Communication, Problem Solving, Decision Making, Conflict Management &amp; Collaboration</b>			(0)	(1)	(2)	(3)
1.	How well does your family communicate?					
2.	How well does your family solve problems?					
3.	How well does your family make decisions?					
4.	How well does your family manage conflict?					
5.	How well does your family collaborate?					

Enter your survey scores in the following table. If you scored 0 or 1 in any area consider: (a) what needs to be done to improve the situation and (b) how important is it to make that happen?

*Score Guide: rate your Priority from: (A) = Urgent: needs to be addressed soon; (B) Important: get onto it ASAP; (C) Noteworthy: keep in mind, but no need to do anything now; (D) Unimportant: no need to do anything.*

<i>Family Fundamentals – Results</i>	<i>Actions Required</i>	<b>Priority</b>	<b>Scores</b>			
		(A to D)	(0)	(1)	(2)	(3)
1. Family Values, Vision, Mission and Goals						
2. Family Plans						
3. Family Rules, Policies and Procedures						
4. Family Code of Conduct						
5. Family Meetings						
6. Family Processes:						
- Communication						
- Problem Solving						
- Decision Making						
- Conflict Management						
- Collaboration						

What happens next? If you've identified any priority items (A or B), somebody needs to do something about them. The issues won't fix themselves. If you need help, or just want to bounce some ideas around, please contact us for an obligation-free discussion. It may be the most important call you make this year.

Contact us: [<click here>](#)