

# Interviewing and Selecting Family Business Consultants

There are many consultants and business advisors serving the needs of business-owning families. Finding the right one may seem like a daunting task. When you begin exploring hiring an advisor, you should feel comfortable asking the candidate a number of questions to make sure the person is properly qualified to serve your family's needs.

## 15 Questions to Ask Family Business Advisor Candidates

1. Do you offer family business consulting exclusively? If not, what other products or services do you or your company provide?
2. How do you stay abreast of the latest developments in your field, for example business strategy and family dynamics?
3. Can you provide examples of situations you have encountered that might relate to ours? What were your goals, what did you do and what was accomplished by the business family?
4. Can you provide an example of when you were not successful? On reflection, why do you think the engagement was not a success?
5. Please provide an example of where you encountered a very sensitive family issue that you did not anticipate.
6. How are you unique from others in your field?
7. What are your values and beliefs about working with clients? Why do you do this work?
8. Describe your experience with multi-generational families.
9. How long do you usually work with client business families?
10. How long have you been a family business advisor?
11. What is the length of time you have spent with families with whom you currently work?
12. How many months/years (or other time frame) would you anticipate working with us?
13. Describe how you have helped successfully engage members who have become more distant or are reluctant participants.
14. What makes your approach and experience especially well-suited to our needs?
15. What is the first tool or technique you would use to get to know our family and why?

## Family Advisor Candidate Rating Form

First complete individual ratings, then share and discuss with all members of the search committee.

If the consultant encountered a challenge, s/he has the courage, sensitivity and skill to engage us to make needed and difficult changes.



The consultant will seek to understand our unique goals and values rather than impose a one size fits all approach.



The consultant has the expertise and experience relating to both family and business and has a good balance between the two.



During the interview, the consultant offered me enough of an opportunity to ask the questions I wanted to ask.



During the interview, the consultant clearly demonstrated that s/he accepted and respected my views.



From the consultant's explanation in the interview, I am able to clearly understand what s/he has to offer and this fits well with my expectations.



The consultant made it clear that s/he is willing to tailor her/his approach to our situation and goals.



The consultant will change her/his approach when or if we require such.



I believe the consultant will be a good listener.



I believe the consultant will fit culturally with our family.



During the interview, the consultant demonstrated wisdom; that is, I felt s/he provided thoughtful answers to questions based on experience.



I trust the consultant's integrity.



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The "15 Questions to Ask Family Business Advisor Candidates" and "Family Advisor Candidate Rating Form" are adapted from *The Family Council Handbook* written by Christopher J. Eckrich and Stephen L. McClure; Family Business Publications are a combined effort of The Family Business Consulting Group and Palgrave Macmillan

To learn more about The Family Business Consulting Group and how we serve families like yours, call us at (773) 604-5005 or email us at [info@thefbcg.com](mailto:info@thefbcg.com). There is absolutely no obligation.