

IN THE
COMPANY
of FAMILY

HOW *to*
THRIVE
WHEN
BUSINESS
IS PERSONAL

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Appendix

Self and Family Assessment

Ask family members who have read this book with you to complete the Assessment, also. Additional copies are available at companyoffamily.com/resources.

**On a scale of 1-5 (1 = poor, 5 = excellent),
how would you rate skill at ...**

1. Letting in the good
2. Keeping out the bad
3. Allowing others to reap the natural consequences of their choices
4. Differentiating between responsible for and responsible to
5. Differentiating between hurt and harm
6. Differentiating between true guilt and false guilt
7. Being fair
8. Being firm
9. Being friendly
10. Making boundaries visible
11. Knowing if, when, and to what degree to be flexible
12. Differentiating personal and business — so disagreement in one role does not infect another
13. Trusting others, including allowing them to regain your trust
14. Behaving respectfully towards others, even when you disagree
15. Being consistent

Your skill level (a)	Your family's overall skill level (b)

Instructions follow with suggestions on how to use Self and Family ratings.

*How to use your Self Assessment Ratings**

Ratings of 1-2:

- Reread the chapter on each principle scoring a 1 or 2.
- Consider how each principle is impacting you, your family, and your business.
- Which principle scoring in this range has the greatest need for improvement?
- Which has the greatest potential for impact?
- Use this reflection to help you choose one in this range to focus on developing.

Ratings of 3-4:

- You have developed a level of skill with this principle. Keep growing.
- To further enhance your skill, identify one or more current situations to which you will apply it.

Ratings of 5:

- You have developed strength with this skill. Congratulations.
- Consider how you developed this level of skill and how that experience may help you become more skillful with other boundary principles.
- Consider how you might mentor or support other family members seeking to grow this skill.

* See Chapter 13 — Consistency, for additional guidance on setting goals to build better boundaries.

*How to use your Family Assessment Ratings**

With family members who have read the book and completed their own Assessment, have a conversation about each person's ratings, including how you reached the rating you assigned. Discuss how the principles impact you individually, as a family, and as a family business. Approach the conversation with an open mind and seek to understand differences. People can experience the same facts differently. It is not a matter of who is right or wrong. This is an opportunity to gain insight into the experiences and perceptions of others.

The family ratings can help guide your focus as a group. Discuss together the principles with which you would like to become more skillful as a family. You may start with a principle most in need of improvement or one with the greatest potential for impact. Discuss how you may work together toward a shared goal.

Consider how family members with higher individual skill ratings may support family members wanting to grow their skill with the same principle.

* See Chapter 13 — Consistency, for additional guidance on setting goals to build better boundaries.