



STONE CENTER FOR FAMILY BUSINESS, ENTREPRENEURSHIP, AND INNOVATION RICHARDS COLLEGE OF BUSINESS

2025 Family Business Retreat Draft Agenda/Program July 23rd and 24th 2025

"The Stone Family Business Retreat was created to allow the opportunity to strengthen relationships, align visions, and address challenges facing a family owned and operated business without the distractions of daily operations. This event creates an agenda that allows families to collaborate with others, gain leadership insights, as well as encourage innovative thinking. The value of attending this family business retreat lies in its ability to foster both personal and professional growth and ensures both the business and family continue to grow and thrive together. For anyone working in a family business, this retreat is designed specifically for you. I encourage you to set aside two days to learn, grow, and unlock the full potential of your family business."

Day 1- July 23rd: (9:00 AM - 7:00 PM)

9:00 to 9:30 Breakfast

9:30 to 10:30 Introductions and developing your leadership team

10:45 to 11:45 Family business leadership succession

12:00 to 1:30 Story-telling & lunch

2:00 to 3:00 Breakout Sessions

Track 1: Managing conflicts in family business: Family business succession often leads to conflicts due to the overlap of family, business, and ownership. Effective conflict management and social skills are crucial for ensuring smooth transitions and maintaining family harmony.

Track 2: Family relationships in a successful business: This session will evaluate balancing family dynamics with business success, including conflict resolution, role clarity, and how to maintain professional growth.

3:00 to 4:00 Breakout Sessions

Track 1: Developing an entrepreneurial mindset: This session will explore developing an entrepreneurial mindset within a family business structure. It will explore knowledge, attitude and skills required to excel leading or working for a family business.

Track 2: Future lens on technology and A.I.: This session will explore how A.I. is reshaping industries and impacting businesses, focusing on its effects in customer service, retail, banking, and government. Participants will be exposed to future innovations and opportunities presented by A.I. technologies.

4:00 to 5:00 Peer to peer connection hour

5:00 to 7:00 Networking Reception & Dinner

Day 2- July 24th: (9:00 AM - 2:00 PM)

9:00 to 9:30 Breakfast:

9:30 to 10:30 Building and rebuilding trust / family values as a competitive advantage

10:45 to 11:45 Breakout Sessions

Track 1: How boards can help entrepreneurial families move forward: This session will focus on how boards can support entrepreneurial families during crises and beyond, covering board roles, composition, and the involvement of the next generation.

Track 2: Engaging non-family employees working and building a career in your family business: This session will explore how to engage and develop non-family employees in family businesses, focusing on building leadership roles and ensuring their growth alongside family members.

12:00 to 1:30 First- & second-generation family business panel & Lunch

1:30 to 2:00 Wrap-up

Cost

General Admission: \$250/ person

Educator: \$150/ person