

# CREATING CLEAR ROLES AND BOUNDARIES — IN YOUR — FAMILY BUSINESS

5 Steps to Minimize Tension  
and Maximize Growth



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The insights and advice provided are based on general business principles and the author's personal experiences.

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Readers are encouraged to consult with qualified professionals to receive personalized advice tailored to their specific business needs and circumstances.

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Success in family business depends on various factors unique to individual situations.

Please use this resource as a guide, but rely on your own judgment and professional advice to make the best decisions for your business.

# INTRODUCTION



*"Family ang involved sa negosyo. Paano ba gawing maayos?"*

This is one of the most common questions I get asked during my mentoring sessions.

And I understand why.

Let me share Leilanie's story with you.

Leilanie started a small food business making Filipino snacks from her home kitchen.

Her dream?

To grow it enough so her OFW husband, Joel, could finally come home for good after 15 years in Dubai.

Every night, after sending product photos to her resellers through Viber, she would video call Joel: *"Konti nalang, makakauwi ka na. Lumalaki na ang business!"*

But life had other plans.

Unexpectedly, Joel's company had massive layoffs.

Instead of his planned homecoming when his contract ends, he had to return to the Philippines immediately.

Leilanie was caught off guard. While happy to have her husband home, she worried about adjusting from running the business solo to working with Joel 24/7.

# INTRODUCTION



*"Dati text-text lang kami about business decisions.  
Ngayon, magkasama na kami araw-araw."*

Their children, Mike, a college student studying Business Management, and the tech-savvy Anna, also wanted to help "modernize" things.

*"Ma, kailangan na nating mag-digital marketing!"*

*"Pa, dapat gamitin natin ang social media para dumami ang customer!"*

Have you encountered similar situations?

It's common to face challenges in a family business.

In my 40+ years of business experience and mentoring many Filipino business owners, I've seen how family businesses can either become our greatest strength or our biggest challenge.

The good news?

With clear roles and boundaries, you can minimize tension and maximize growth.

This ebook provides 5 actionable steps to guide family businesses toward success.

# CHAPTER 1

## When Roles Mix with Relationships



Remember Leilanie from our introduction?

Let me tell you more about her first few months working with her husband Joel.

After 15 years of running the household and starting the business on her own, Leilanie developed her own systems.

She knew every supplier by name.

She had routines for production, quality control, and delivery.

Then Joel came home.

With his corporate experience in Dubai, Joel immediately saw ways to "improve" things:

*"Hon, dapat may proper inventory system tayo."*

*"Dapat may daily reports ang production."*

*"Bakit hindi natin i-expand ang distribution?"*

Leilanie found herself torn.

She was happy to have her husband's help, but...

*"Parang hindi niya nakikita ang effort ko in the past years,"* she confided to me during one mentoring session.

*"Feeling ko hindi valid ang systems na ginawa ko."*

Have you experienced this?

*Let's explore some common challenges when family and business roles get mixed up:*





## 1. The *“I’m the Boss”* vs *“You’re the Employee”* Dynamics

You see, Filipino families have their natural flow at home.

We grow up knowing who calls the shots.

Parents guide the kids, older siblings look after the younger ones, and traditionally, the husband takes the lead at home.

But mix in a business setting?

That’s where it gets interesting.

Imagine your Ate, who used to just bug you about cleaning your room, now having to review your sales numbers.

Or picture having your wife, who you share breakfast and inside jokes with, suddenly discussing why you missed last month's targets.

It's like trying to play basketball and chess at the same time - same players, completely different rules.

For Leilanie and Joel, this was their biggest hurdle.

In their home, they were husband and wife.

But in the business?

Leilanie was technically Joel's boss since she started it.

*"Minsan magtatanong ako about production numbers, tapos sasabihin niya 'Ano ba, asawa mo ako, hindi empleyado!'"*  
Leilanie shared.



Now don't get shocked or anything.

You see, this is a common struggle.

Our traditional family roles sometimes clash with business needs.



*The key is understanding that we can wear different hats at different times.*



## 2. The *"Younger Generation Knows Better"* Syndrome

You know how it gets in family businesses, right?

Sometimes, everyone thinks they've got all the answers!

Let's say, you're like Leilanie who's been running the store forever, super confident about her ways.

Then there were Mike and Anna, their children.

Mike, who is in his final semester in college:

*"Ma, Pa, kailangan nating mag-automate! Natutunan ko sa school..."*

And Anna, who is passionate about all things social media, said, *"We need to build our social media presence! It's the way to go!"*

It's pretty funny when we see it happen.

The younger ones burst in with their, *"Ma, let's do this..."* or *"Pa, sa marketing class ko..."*

Meanwhile, we are like, *"Noon pa naming ginagawa ito."* or the classic, *"Trust me, I know our customers."*

While their enthusiasm was admirable and their ideas had merit, they sometimes forgot that experience has its own wisdom.

*"They want to modernize everything immediately,"* Leilanie explained.



*"They don't understand that we have customers who aren't comfortable with online ordering."*

The thing is, everyone gets caught up in it.

One minute it's the parents refusing to try anything new.

Next thing you know it's the kids acting like what they learned from their teachers know better than 15 years of running the business.



## QUICK CHECK: Do You Have These Signs?

**Take a moment to reflect.**

Do you experience any of these in your business?

- Family members giving unsolicited advice about your area of responsibility
- Bringing business arguments to the dinner table
- Confusion about who makes final decisions
- Different family members giving different instructions to employees
- Business discussions taking over family gatherings

If you checked even one box, don't worry!

These are normal challenges in any family business.

The good news is, there are solutions.

## **ACTIVITY:** **Family Business Health Check**

**Take a few minutes to answer these questions:**

1. What roles do your family members currently play in the business?
2. Which areas cause the most tension or confusion?
3. What traditional family dynamics might be affecting your business relationships?

In the next chapter, we'll look deeper into common mistakes family businesses make and how to avoid them.

**But before we move on remember this:**

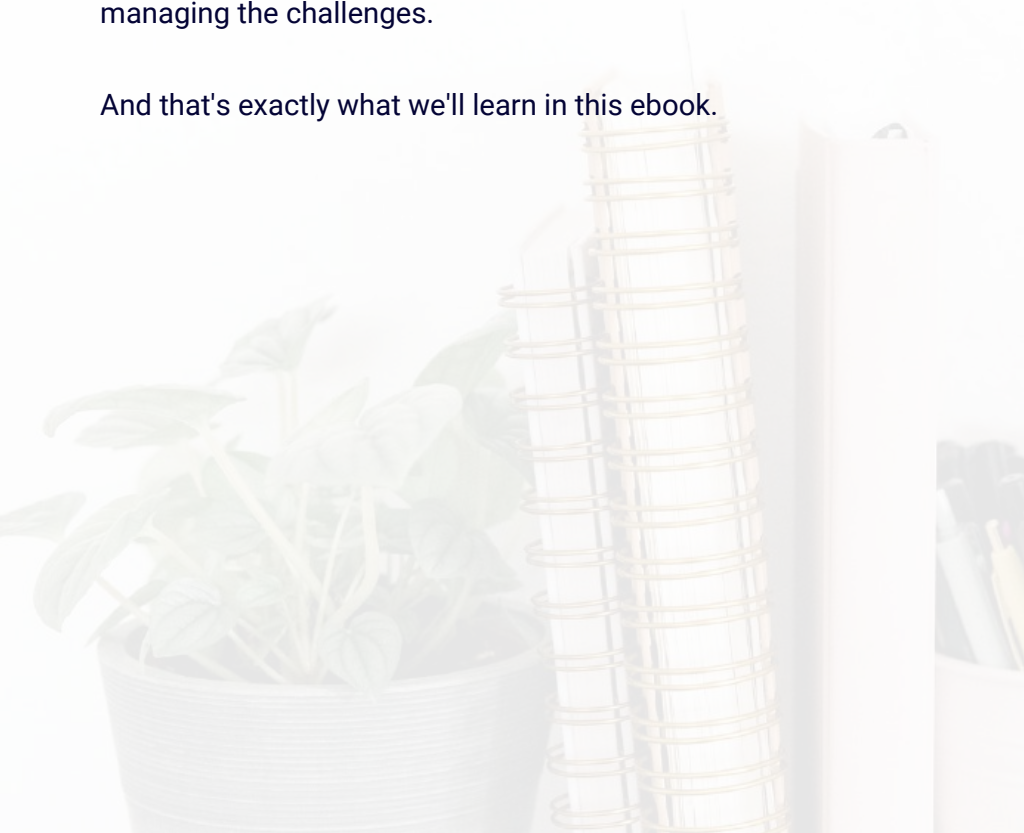
*Having family in business isn't just about challenges. It can be your biggest strength.*

## Think about it:

- Who will be more committed to your success than your own family?
- Who knows your values and vision better?
- Who will stand by you during tough times?

The key is learning how to harness these advantages while managing the challenges.

And that's exactly what we'll learn in this ebook.



# CHAPTER 2

## Common Pitfalls in Family Business



Let's return to Leilanie and Joel's story during their first year of working together.

Their experience shows us what NOT to do in a family business.



## 1. The *"I Know Better"* Trap

When Joel first came home, he was eager to apply everything he learned from his corporate job in Dubai.

Without learning Leilanie's existing systems, he started changing things:

*"Dito sa Dubai, ganito ang sistema..."*

*"Sa corporate, may proper documentation..."*

*"This is how professional companies do it..."*

Leilanie felt hurt and undervalued.

Fifteen years of running the business successfully, yet suddenly everything needed to be *"professionalized"*?

So you see, when one person insists their way is the only way, it can lead to frustration, missed opportunities, and even tension at home.

Let's consider that a business thrives when both partners feel valued and heard.

You might consider to address this issue by:

Open communication, mutual respect, and a willingness to consider new perspectives.

Because the best ideas often come from working together.





## Lesson:

Before suggesting changes in a family business, take time to understand how things already work.

I've mentored business owners who wanted to bring in new systems right away, only to realize that flexibility is key.

What works in big companies won't always fit a smaller, more personal setup.

Some things may seem inefficient, but they've stood the test of time for a reason.

Instead of forcing changes, the real challenge is learning when to adapt and when to improve.

It's about balancing fresh ideas with the practical realities of how the business, and the people in it, actually operate.

## Ask Yourself:

1. Do I listen to other family members' ideas, or do I assume my way is always the best?
2. Have I ever dismissed a suggestion without truly considering it, just because it came from someone younger or less experienced?
3. How can I encourage open discussions in our family business instead of making all the decisions on my own?





## 2. The *"I'm in Charge"* Syndrome

Leilanie, used to making all decisions, struggled to let go...

*"Sanay ako na ako lahat... Ngayon, parang hindi ko na alam kung ano role ko."*

Joel, wanting to prove his worth...

*"Parang walang tiwala sa abilities ko..."*

And their children are caught in between.

This is one of the pitfalls that may lead to confusion in the whole operation.

They don't know who to follow.

This may take a while to realize that combining their strengths worked better than trying to overrule each other.

Joel's corporate experience complemented Leilanie's practical knowledge.

You see, when they started working together instead of trying to prove who knew better, that's when their business started to grow.





## Lesson:

Shifting from making all the decisions yourself to sharing leadership isn't always easy.

It's definitely not easy going from being the only one calling the shots to sharing the leadership role with someone else.

It's like suddenly having a co-pilot when you've been flying solo for so long.

It's going to take some patience, for sure.

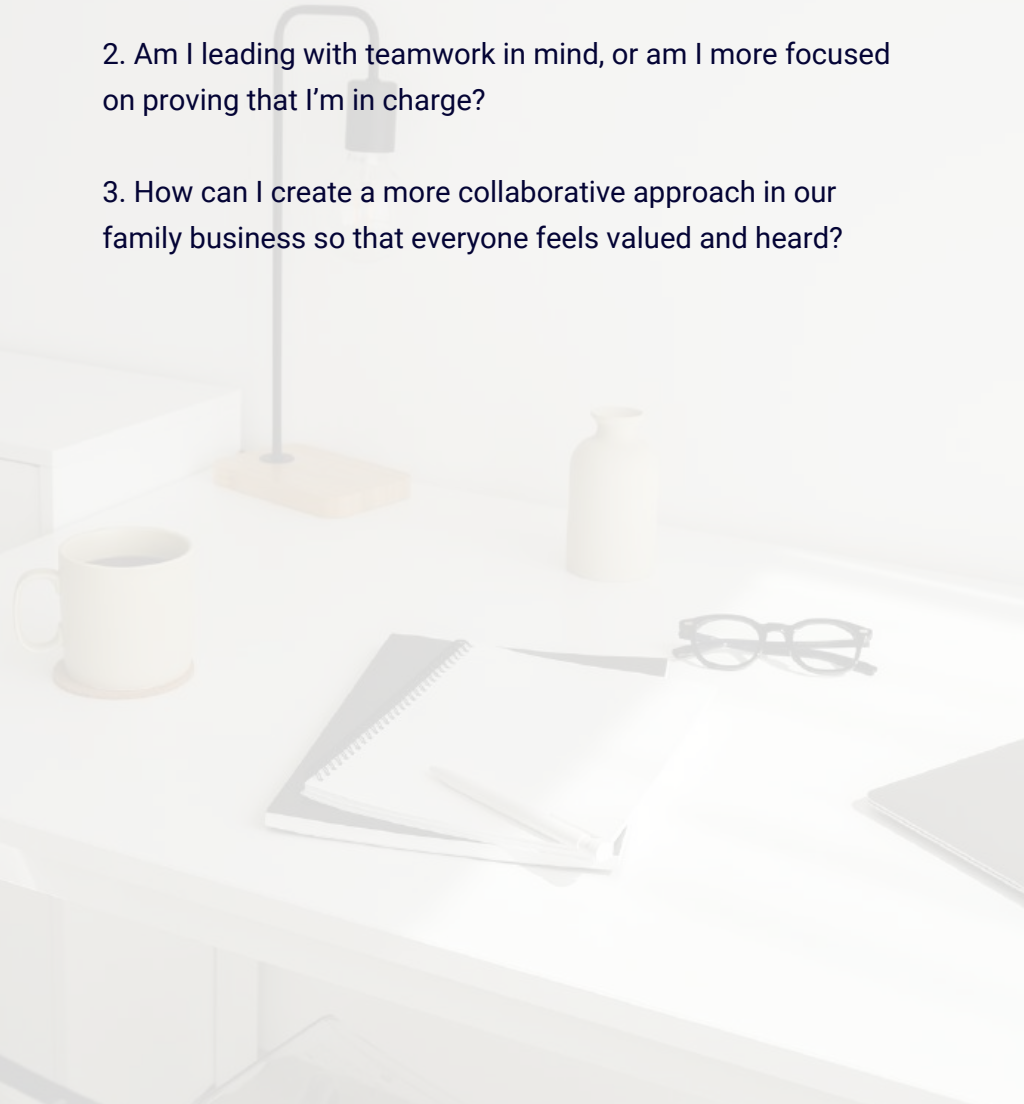
You've got to be open to different ideas, and you both need to make sure you're on the same page.

It's all about having clear, honest conversations about roles, responsibilities, and expectations.

That way, when both sides feel heard, working together becomes much easier.

## Ask Yourself:

1. Do I make decisions on my own, or do I take the time to listen to my family members' ideas and experiences?
2. Am I leading with teamwork in mind, or am I more focused on proving that I'm in charge?
3. How can I create a more collaborative approach in our family business so that everyone feels valued and heard?





### 3. The *"Modernization"* Rush

This happens a lot in small businesses.

People get excited about the latest tech, apps, or strategies they see big businesses use.

Mike, their son, was particularly eager to digitize everything.

*"Ma, we're so behind the times!"*

He wanted to upgrade everything: new software, new processes, new everything.

But here's the thing, just because something's modern doesn't mean it's the right fit.

Leilanie had been running things with systems that worked well for her and the team.

The rush to "modernize" ended up feeling like an unnecessary change and added stress instead of improvement.





## Lesson:

The key is balance.

Yes, modernization is great.

However, it's important to take things one step at a time and make sure the changes actually make sense for the business, not just because they're trending.

It's about adding value to the old ways while gradually introducing new ideas that make sense.

## Ask Yourself:

1. Am I rushing into changes just because they seem trendy, or am I considering if they'll truly benefit the business?
2. Have I taken the time to understand how current systems work before suggesting any big shifts?
3. How can I balance modernizing the business while still respecting the methods that have been working so far?





#### 4. The "24/7 Business Talk" Problem

Running a family business often means work conversations never really stop.

Leilanie and Joel used to have this problem.

They would talk about the business at breakfast, during family outings, even before bed.

Their daughter Anna finally pointed it out:

*"Ma, Pa, kahit Sunday lunch natin, puro business na lang!"*

They didn't realize how much work had taken over their daily lives.

They didn't realize how much work had taken over their daily lives.

It was getting harder to just be a couple, be parents, or enjoy time outside the business.

This happens when business talk takes up all the space, leaving little room for anything else.





## **Lesson:**

You can love your business, but taking breaks matters too.

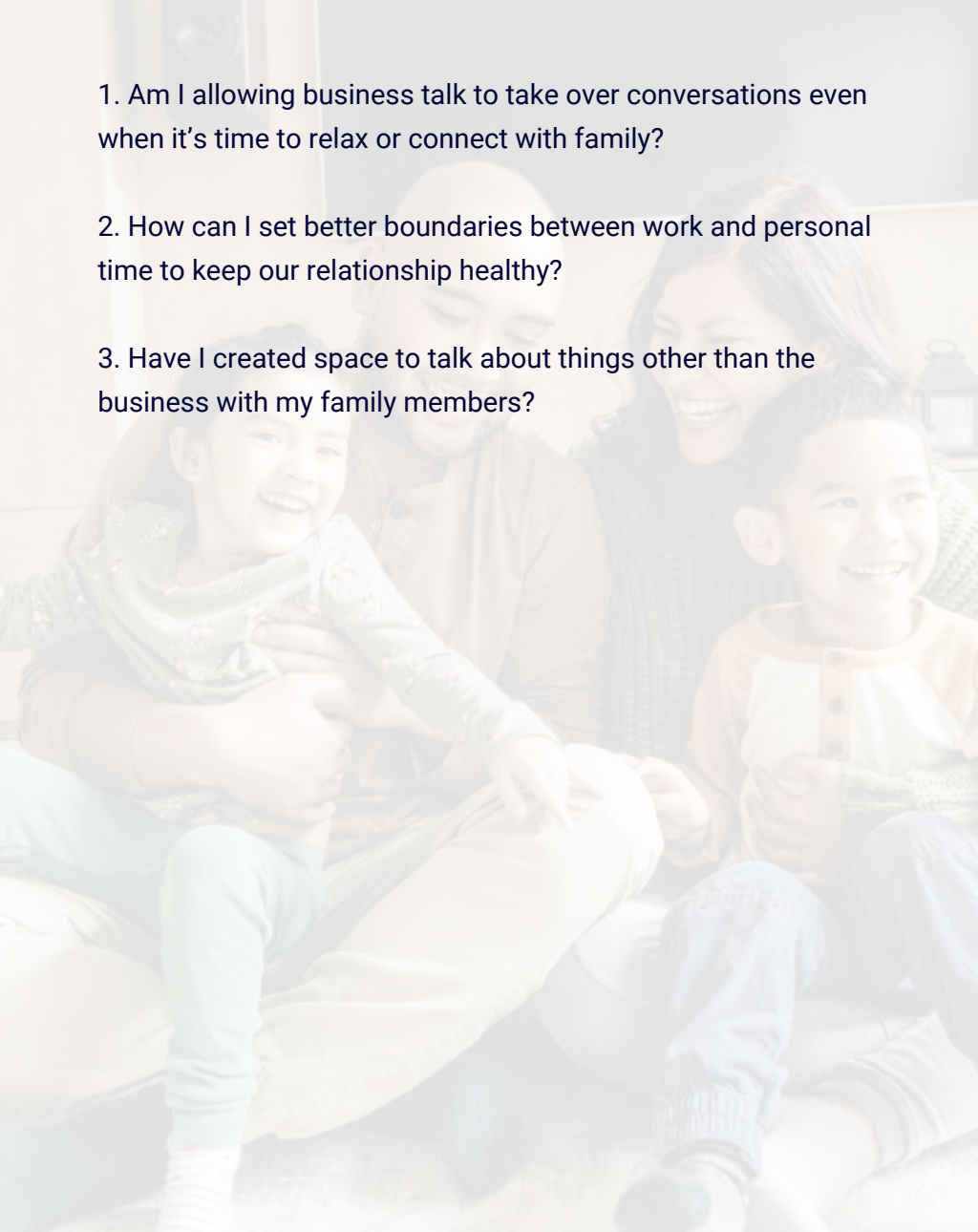
Stepping back helps you recharge, think clearly, and spend quality time with your family.

A successful business isn't worth it if it hurts your relationships.

Make time for things outside of work, because a strong family makes a strong business.

## Ask Yourself:

1. Am I allowing business talk to take over conversations even when it's time to relax or connect with family?
2. How can I set better boundaries between work and personal time to keep our relationship healthy?
3. Have I created space to talk about things other than the business with my family members?



## Signs You're Falling Into These Traps:

- Do family members often say "*That's not how we do it in (previous workplace)*"?
- Are there frequent arguments about "*old way vs new way*"?
- Do you feel defensive about your methods?
- Is there tension during business discussions?



## **DO THIS:** **Spot Your Family Business Pitfalls**

**Take a moment to reflect:**

1. Which of these situations feels most familiar to you?
2. What defensive reactions do you notice in yourself when family members suggest changes?
3. How often does business talk invade family time?



# Learning from Others' Mistakes

Let me share what happened when Leilanie and Joel ignored these warning signs:

- Production slowed because workers got confused about whose instructions to follow.
- Their children started avoiding family gatherings because *"it's all about business anyway"*.
- Their relationship became strained as business disagreements affected their marriage.
- Good employees left because of inconsistent management.

But don't worry...

Leilanie's story has a happy ending.

She and her husband tackled these challenges using the 5 steps we'll cover next.

## Quick Tips to Start With:

- Identify what's already working before making changes.
- Set clear times for business discussions.
- Recognize each family member's role and contribution.
- Make room for personal conversations, not just business.



## Now, think about this:

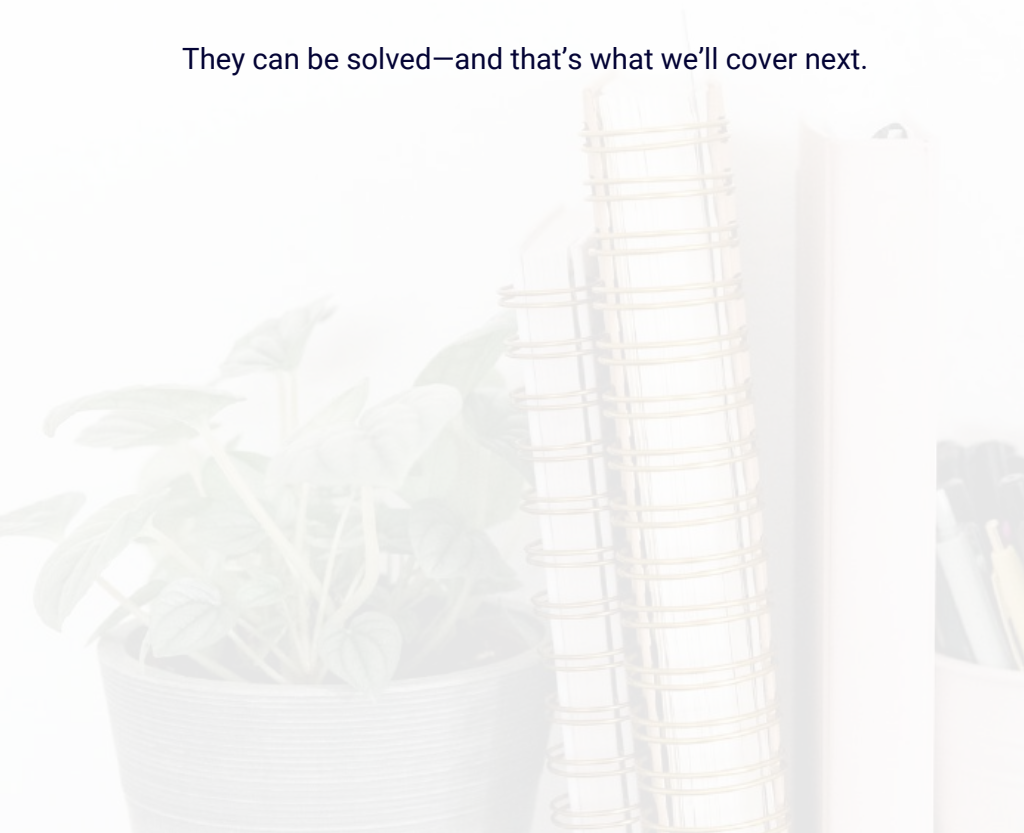
What's your biggest challenge in the family business?

Is it really about the system, or is it about relationships?

From experience, most "*business problems*" are actually relationship problems in disguise.

The good news?

They can be solved—and that's what we'll cover next.



# CHAPTER 3

## 5 Steps to Better Roles and Boundaries



Remember how Leilanie felt when Joel came home, and their kids started throwing in their own business advice?

It was overwhelming...

Too many voices, too many opinions, all at once.

Through proper guidance and lots of family discussions, they found a way to make things work.

Here are the 5 steps they used.

These are the same ones that have helped many small business owners I've mentored and coached over the years.



## Step 1: Define Clear Roles

When I first suggested role definition to Leilanie, she was skeptical:

*"How do we define roles when we're family? Won't it feel too formal?"*

This is a common concern.

Some worry that making things too "business-like" might affect family dynamics.

One moment, you're talking business. The next, you're back to being spouses, parents or siblings.

That's why setting clear roles helps.

It's not about being strict, it's about making things smoother.

When everyone knows what they're responsible for, there's less stress, fewer misunderstandings, and more time to focus on growing the business.



# Here's how Leilanie's family did it:

## **Leilanie (Founder & Product Development Head)**

- Creates and improves products
- Manages supplier relationships
- Ensures product quality
- Sets the business direction

## **Joel (Operations & Finance Head)**

- Manages production, inventory, and logistics
- Supervises staff
- Tracks income and expenses
- Handles invoices, payments, and financial records

## **Mike (Marketing & Sales Lead)**

- Manages social media and promotions
- Oversees online orders
- Updates website and tracks sales

## **Anna (Customer Relations & Support)**

- Handles inquiries and customer concerns
- Processes orders and feedback
- Coordinates with resellers

# DO THIS: Map Your Family's Roles

Take a moment to list each family member involved in your business and their strengths:

Family Member	Natural Strength	Current Task	Potential Role
			Mon
		Sun Week 05	
			Week 06
			5
			Week 07
			12 Week 08



## Step 2: Set Clear Money Rules

Let's talk about money—one of the trickiest parts of running a family business.

As they say, "*Kapag pera na ang usapan, kahit magkapatid nag-aaway!*"

Things can get messy fast if you don't set clear money rules early on.

Leilanie and Joel felt this struggle early on.

They weren't sure:

- How much salary to take
- If they should reinvest profits or just split them
- What to do when someone needed to borrow from the business
- If family members should get paid more just because they're family

Money talk can get tricky, but setting clear rules early can save a lot of headaches later.

Decide upfront how you'll split profits, who handles expenses, and how to deal with financial concerns.

When everyone knows what to expect, there's less room for confusion or conflict.

It's all about keeping things fair and avoiding unnecessary tension.



# Here's what worked for them:

## 1. Keeping Business and Personal Money Separate

Leilanie and Joel's first step was making sure their business and personal money didn't mix.

They opened separate bank accounts and set fixed salaries for everyone, including themselves.

They also made clear rules on when and how money could be taken from the business.

This helped them stay organized and avoid confusion.

## 2. Setting Rules for Emergency Funds

Next, they made sure the business always had enough money for daily operations.

They agreed on a fixed amount that should always stay in the business account and created a clear process for emergency withdrawals.

This way, they didn't have to make rushed decisions when unexpected expenses came up.

## Here's what worked for them:

### 3. Paying Family Members Fairly

With their finances in order, they then focused on fair compensation.

They paid family members based on market rates, not just assumptions.

They also introduced performance-based bonuses (yes, even for family!) and set clear policies on benefits.

This made sure everyone felt valued and knew exactly what to expect.

These simple steps made handling money easier and avoided a lot of arguments.

## **DO THIS:**

# **Money Boundaries Checklist**

1. Do you have separate bank accounts for business and personal money?
2. Are family members' salaries clearly set?
3. Do you have written rules for:
  - Taking money from the business?
  - Sharing profits?
  - Handling emergency funds?
  - Keeping personal and business expenses separate?

This makes it easy to check if your family business has clear money boundaries!

## **Ask Yourself:**

How can I apply the money boundaries checklist to ensure that both personal and business finances stay clear and well-managed in my own family business?



## Step 3: Create Work and Family Boundaries

When you're running a family business, it's easy for work to bleed into family time, right?

Leilanie and Joel discovered this the tough way.

They had to make an effort to draw a line between work and home life.

They set rules like no business talk during dinner or family gatherings.

This helped them avoid that constant work stress creeping into their personal time.

Setting these boundaries isn't just about protecting your business; it's about keeping your relationships strong and making sure you don't burn out.



One day, during a mentoring session, Leilanie shared something interesting:

*“Before, I’d immediately scold Joel when something went wrong in production. Now, we have a system—it’s less stress and fewer fights!”*



# **Their new system included:**

## **1. Time Boundaries**

Leilanie and Joel set their business hours from 8 AM to 5 PM and made sure to avoid any business talk during family meals, weekend family time, holidays, and bedtime.

This helped them keep work from taking over their personal life.

## **2. Space Boundaries**

Leilanie and Joel set up a designated home office for work, used business-only phone lines, and created separate chat groups for family and business conversations.

This helped them keep things organized and ensured their work didn't spill over into their personal life.

### 3. Communication Boundaries

Leilanie and Joel scheduled regular business meetings, making sure not to hold them during family time.

They kept a professional tone during business hours and switched to a more personal, relaxed tone when they were with family, helping to maintain a healthy balance between work and home life.



# DO THIS:

## Create Your Boundary List

What boundaries do you need in your family business?

**List them here:**

**Time Boundaries:**

- 1.
- 2.
- 3.

**Space Boundaries:**

- 1.
- 2.
- 3.

**Communication Boundaries:**

- 1.
- 2.
- 3.



## Step 4: Put It in Writing

When I first suggested this to Leilanie, she was hesitant.

*"Mommy N, isn't it awkward to have contracts with family?"*

*"Doesn't that mean we don't trust each other?"*

*"Isn't that a bit too formal?"*

I smiled when she raised her concerns.

And I reassured her that these are normal reactions.

In our Filipino culture, we often feel that formal agreements mean a lack of trust.

But actually, written agreements help keep relationships strong by avoiding misunderstandings.

This way, there was no confusion, no second-guessing, and no awkward arguments.

Whenever a question came up, they could just check what they agreed on instead of relying on memory.

It wasn't about formality—it was about keeping things smooth and fair, both in business and at home.

Here's how they made it work:



# **Their Simple Family Business Agreement included:**

## **1. Roles and Responsibilities**

- Leilanie handles Product Development.
- She has the final say on recipes, manages supplier relationships, and sets quality standards.

## **2. Decision-Making**

- For major expenses over ₱10k, all family members must agree.
- Leilanie makes the final call on new products.
- Marketing ideas from Mike and Anna need approval before being implemented.

## **3. Money Matters**

- Fixed monthly salaries and profit-sharing every quarter.
- Clear rules for emergency funds and salary increases.

## **4. Exit Plan**

- Guidelines for what happens if a family member leaves the business.
- A plan for succession and retirement.

By putting this in writing, everyone knew their role, and decisions became smoother—less drama, more clarity.

# DO THIS:

## Draft Your Agreement

Use this simple template to start your family business agreement:

### 1. Family Members' Roles:

- Who: \_\_\_\_\_
- Role: \_\_\_\_\_
- Main Responsibilities:
  - 
  - 
  -

### 2. Decision-Making Authority:

- Big decisions (₹\_\_\_\_\_ + amount): \_\_\_\_\_
- Daily operations: \_\_\_\_\_
- Emergency situations: \_\_\_\_\_

### 3. Financial Arrangements:

- Salaries: \_\_\_\_\_
- Profit sharing: \_\_\_\_\_
- Business expenses: \_\_\_\_\_



## Step 5: Keeping Communication Simple and Effective

Miscommunication can create unnecessary stress in a family business.

Leilanie observed that small misunderstandings could quickly turn into bigger problems.

So, she decided to start a simple habit—quick daily check-ins.

Nothing too formal, just a short conversation to make sure everyone was on the same page.

This small change made a huge difference.

It helped them avoid conflicts and made working together much easier.

# DO THIS:

## Draft Your Agreement

### 1. Quick Daily Check-ins (15 minutes)

Each morning before starting work, Leilanie and the team take a few minutes to check-in.

Everyone shares:

- ✓ Their top priority for the day
- ✓ Any challenges they might need help with
- ✓ Important updates from the previous day

This short routine keeps everyone aligned, ensures problems are addressed early, and makes teamwork smoother.

### 2. Weekly Business Meetings (1 hour)

Every Sunday at 4 PM, they hold a weekly meeting to:

- ✓ Review the past week's progress
- ✓ Plan for the upcoming week
- ✓ Address any important issues

To keep things efficient, they set one simple rule: everything must be discussed within the set time.

This helps meetings be more productive and prevents them from dragging on too long.

### 3. Monthly Reviews (2 hours)

Once a month, they take a step back to look at the bigger picture. They:

- ◆ Review business performance
- ◆ Check in on family dynamics
- ◆ Celebrate wins—big or small
- ◆ Discuss challenges and make plans for the month ahead

This keeps both their business and family relationships strong.

Leilanie shared how this helped them...

*"Before, we'd raise our voices when there was a problem. Now, we have a proper time to discuss things calmly."*

#### 4. The Power of a Simple Debrief

Leilanie keeps their morning check-ins quick and simple, usually just five minutes.

##### **Morning Check-in Questions:**

- *"What's your main goal today?"*
- *"Do you need any help?"*
- *"Any updates from yesterday?"*

##### **Evening Check-in Questions:**

- *"What's your win for today?"*
- *"Any challenges?"*
- *"What's your plan for tomorrow?"*

Of course, there were times they couldn't follow through with these meetings—things got busy or unexpected issues came up.

But instead of giving up, they made it a point to make up for missed check-ins and keep the momentum going.

What mattered most was staying committed to clear communication, even if it wasn't always perfect.

These simple habits helped the team reflect, solve issues early, and stay on track—without the stress of long meetings.



# DO THIS:

## Create Your Communication Schedule

Plan your family business communication:

### Daily Quick Meet:

- Time: \_\_\_\_\_
- Duration: \_\_\_\_\_
- Participants: \_\_\_\_\_

### Weekly Meeting:

- Day: \_\_\_\_\_
- Time: \_\_\_\_\_
- Agenda Items:
  - a. \_\_\_\_\_
  - b. \_\_\_\_\_
  - c. \_\_\_\_\_

### Monthly Review:

- When: \_\_\_\_\_
- Duration: \_\_\_\_\_
- Key Points to Cover:
  - a. \_\_\_\_\_
  - b. \_\_\_\_\_
  - c. \_\_\_\_\_

A faded background image of a family sitting on a rug outdoors. A woman in a white dress and a wide-brimmed hat is on the left, a man in a white shirt is on the right, and a child is in the middle. They appear to be in conversation. The background is filled with green foliage.

## Pro Tips from Leilanie's Experience:

1. Keep meetings on schedule
2. No phones during meetings
3. Use "I feel" statements instead of accusations
4. Celebrate small wins
5. Address issues promptly but professionally
6. Keep personal matters for family time

### **Remember:**

Good communication doesn't happen by accident.

It needs structure, commitment, and practice.

# CHAPTER 4

## Making It Work Every Day



For Leilanie, running a family business isn't just about big decisions or long-term plans.

It's about the small, everyday actions that keep things running smoothly.

In this chapter, we'll explore the simple but powerful habits and routines she follows to keep the business on track—while making sure family relationships stay strong.

# A Day in Their Life

## 6:30 AM - Starting Right

Leilanie and Joel made a simple rule for themselves: no business talk until after their morning coffee together.

*"Dati, pagkagising pa lang, production agad ang usapan,"*  
Leilanie shared.

*"Ngayon, we take at least 15 minutes to just be husband and wife first."*

This small habit helps them start the day feeling connected before diving into work.

## 7:30 AM - Morning Huddle (When Possible)

Whenever Mike and Anna don't have early classes, they join a quick 15-minute family huddle.

Leilanie shares product orders for the day, Joel updates the team on production capacity, Mike reports on online marketing, and Anna gives updates on customer feedback.

However, since Mike and Anna are still in school, they can't always be involved in business tasks.

On days when they're too busy with studies, someone from the team steps in to manage their responsibilities.

- The staff helps with responding to customer inquiries.
- A marketing assistant schedules and maintains the business's online presence.
- Their parents take charge of urgent matters.

This setup allows the business to run smoothly without putting pressure on the kids to juggle too much at once.

## 8:00 AM - Work Mode On

At this time, the parents and the team get to work.

- **Leilanie** focuses on product development.
- **Joel** oversees production and logistics.
- **The staff** manages day-to-day operations.

Mike and Anna help out when they can, but their priority is school.

If they have free time, Mike works on digital marketing, while Anna assists with customer service.

If they're swamped with schoolwork, their tasks are covered by the team.



## 12:00 PM - Family Lunch

Their golden rule: no business talk during lunch.

*"This was hard at first,"* Mike admitted.

*"But now it's nice because we talk about other things—like my brother's love life!"* Anna would laugh.

Keeping work separate from meals has helped them stay connected as a family, beyond just the business.

## 5:00 PM - Quick Debrief

Before wrapping up the day, those involved in the business for the day do a quick 5-minute debrief to check on progress, priorities for the next day, and any urgent concerns.

If Mike and Anna are available, they join in.

## After 7:00 PM - Family Mode

Unless there's an emergency, business discussions stop in the evening.

*"This was our game-changer," Joel shared. "Having clear cut-off times helped us maintain relationships."*

By setting these boundaries, they've been able to balance work and family time more effectively.

# Success Stories



## The Social Media Win

When Mike first suggested investing in social media marketing, Leilanie was hesitant.

But with their new system in place, Mike worked only on the strategy, while a marketing assistant handled the actual posting and engagement.

The result?

A 30% increase in orders within just three months! By assigning execution to a team member, Mike was able to contribute to the business.

# The Production Challenge

During a busy season, they faced a big challenge: overwhelming orders, limited production capacity, and the risk of quality issues.

Instead of handling everything on their own, they delegated production tasks to trusted staff while focusing on problem-solving and supplier coordination.

By leveraging their team, they successfully fulfilled all orders without burning out.



# The Customer Service Innovation

Anna noticed that customers were asking the same questions repeatedly.

Since she couldn't always be online to answer them, she created an FAQ document and trained the team to respond consistently.

Now, even when she's busy with school, customers still get quick and clear responses—making operations more efficient without relying on her all the time.





# Handling Common Situations

# Disagreements About Business Decisions

These days, Leilanie and Joel handle disagreements differently.

For example, when they were discussing packaging:

- Leilanie preferred sticking with the traditional design.
- Joel wanted to switch to a cost-effective option.

Instead of arguing over dinner, they set up a time to discuss it properly.

They gathered facts, shared their points, and made a decision together.

To avoid confusion later, they also documented their final choice.



# Dividing Responsibilities Between Mike and Anna

Since both Mike and Anna wanted to take charge of social media, it could have caused confusion.

Instead, they split responsibilities based on their strengths:

- Mike focuses on content creation and analytics.
- Anna handles customer engagement and inquiries.

Since they can't always attend to these tasks, a marketing assistant supports them by executing their plans and keeping things on track.



# Sticking to the System (Even When It's Hard)

Of course, they're not perfect.

There are days when schedules get disrupted, and they can't follow their system exactly.

- Sometimes, Mike gets swamped with schoolwork and can't check on social media marketing.
- Other times, Anna has exams and can't respond to customer messages.
- Leilanie occasionally gets caught up in product development, making it hard for her to check in on daily operations.
- Joel sometimes needs to focus on operation issues, pulling him away from team discussions.
- There are moments when urgent business matters spill into family time.



But instead of getting discouraged, they focus on making up for it and keeping the momentum going.

- If they miss a check-in, they update each other later.
- If a business discussion happens over dinner, they keep it short and get back to personal time.
- If Mike or Anna are too busy, the team ensures that nothing is left undone.
- If Leilanie or Joel are caught up in urgent work, they trust their staff to manage tasks until they're available.

*"The goal isn't to be perfect," Leilanie says.*

*"It's to keep improving and making things work for our family and our business."*



## KEY TAKEAWAYS

- ✓ **Family first, but with clear systems**—business should never overshadow relationships.
- ✓ **Delegate when needed**—having a team helps keep things running smoothly.
- ✓ **Adaptability is key**—not every day will go as planned, and that's okay.

With teamwork, communication, and flexibility, they've found a way to run a successful business without sacrificing their family life.

# DO THIS:

## Your Daily Implementation Plan

Create your family business schedule:

### Morning Routine:

- Family time: \_\_\_\_ to \_\_\_\_
- Business huddle: \_\_\_\_ to \_\_\_\_
- Work starts: \_\_\_\_

### During Day:

- Meeting times: \_\_\_\_
- Break times: \_\_\_\_
- Family meals: \_\_\_\_

### Evening Routine:

- Work ends: \_\_\_\_
- Debrief time: \_\_\_\_
- Family time starts: \_\_\_\_

# TIPS FOR SUCCESS

## 1. **Start Small**

- Begin with one or two changes
- Build habits gradually
- Celebrate small wins

## 2. **Be Consistent**

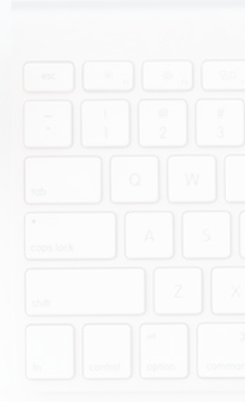
- Stick to scheduled meetings
- Maintain boundaries
- Follow agreed processes

## 3. **Stay Flexible**

- Adjust systems as needed
- Listen to everyone's feedback
- Be open to improvements

## 4. **Keep Learning**

- Attend seminars together
- Share knowledge
- Stay updated with industry trends





## Warning Signs to Watch For

- Boundaries starting to blur
- Business talk creeping into family time
- Roles becoming unclear
- Communication becoming tense
- Meetings being skipped

If you notice these, it's time to revisit your agreements and systems.

## Success Metrics

Track your progress with these indicators:

### Business Metrics:

- Improved productivity
- Better decision-making
- Clearer processes
- Increased profits

### Family Metrics:

- Less tension
- Better communication
- More quality family time
- Stronger relationships

### Remember:

**The goal isn't perfection, but progress.**

# CONCLUSION



As we wrap up, let's reflect on the key lessons to minimize tension and maximize growth in your family business.

Over time, Leilanie's family business has grown beyond its small home-based beginnings, expanding its operations and product range.

But more importantly, they've found ways to strengthen their family bond throughout the journey.

Leilanie shares, *"Before, I was afraid that the business would hurt our family relationships. But now, we're even closer!"*

Joel adds, *"The business actually made our marriage stronger because we learned to communicate better."*

Even Mike and Anna, who could have chosen corporate jobs, decided to stay in the family business.

Mike puts it simply, *"We saw that a family business can be both professional and personal."*

*We don't have to choose between family and success."*

# CONCLUSION



Leilanie's story proves that it's possible to build a successful family business without sacrificing relationships.

When everyone respects each other's roles, sets clear boundaries, and stays open in communication, both the business and the family can thrive.

Now that you already have what you need to balance business and family in a way that works for you.

Take it one step at a time.

Start with one small change today.

Because a family that works together—grows together.



**Ready to simplify your business  
journey?**

**Get your FREE Business Breakthrough  
Starter Kit**

**CLICK HERE** 

*To your business success,*

*Mommy N*

