

## GUIDE

# Family and Business **Basic360**



The world's first online 360° tool to improve your family and business planning

## WHY?

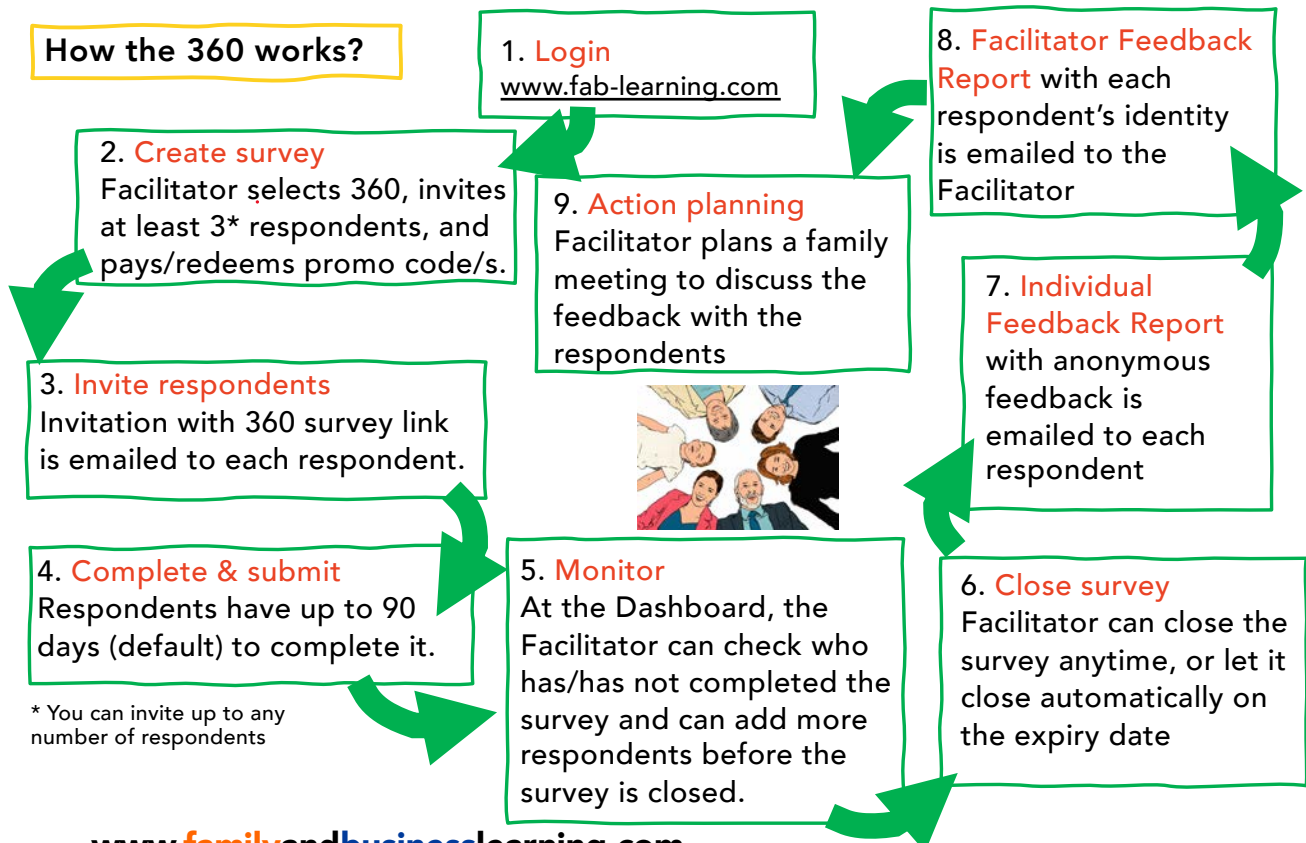
- Apply a shared model and vocabulary for family planning discussions
- Capture the family's feedback on your current family and business planning
- Analyze and discuss planning feedback to develop family and business plans

[www.familyandbusinesslearning.com](http://www.familyandbusinesslearning.com)

v. 09042020

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### How the 360 works?



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# Introducing the Family and Business 360 Facilitators Feedback Report

These instruments are for training and planning by business families, with the support of a **Facilitator**, who may be a family member, family business advisor, or consultant.

A Facilitators Feedback Report (FFR) with the identities of the respondents will be sent to the Facilitator – the user who creates the survey and invites the respondents. Your completing of the survey grants your consent for the Facilitator to use the data in training and planning activities with the family.

To protect confidentiality among individual respondents, the answers to the survey will be collated in the **Individual Feedback Report**.

Except to the Facilitator, none of the information you provide will be identifiable as coming from you, **unless you voluntarily offer personal information** in the narrative or comment boxes.

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**Step 1** Facilitator to **Login** at [www.fab-learning.com](http://www.fab-learning.com)  
Sign up with your email and a password of minimum 8 digits

**FAMILY AND BUSINESS  
LEARNING**

HOME

STORE

TOOLS

BOOK

CONTACT

English ▾



Username

Password

**Sign up**

Login

Forgot password?

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**Step 2** In MY DASHBOARD, click [Create survey](#) for the **Commitment360**. Then add family members (**respondents**) by providing their Email addresses and Names.

## MY DASHBOARD

### AVAILABLE SURVEYS

Name	Action
Commitment360	<a href="#">Price</a> ▶ <a href="#">Create survey</a>
Communication360	<a href="#">Price</a> ▶ <a href="#">Create survey</a>
Advanced360	<a href="#">Price</a> ▶ <a href="#">Create survey</a>
<b>Basic360</b>	<a href="#">Price</a> ▶ <a href="#">Create survey</a>

## Step 2 Create survey

### Basic360

Create a name for your survey. You can use your business name or any other name that your participants will recognise:

Set your expiry date, not more than 90 days ahead:

2020-09-08

Name of the business:

Which country the business resides in:

select country

Which year the business was founded:

Are you also a respondent:

Yes, I am a respondent and the facilitator.

No, I am not a respondent, I am only a facilitator.

Select email language:

English ▾

We do not want a Facilitators Feedback Report

Checking this box eliminates you from receiving the Facilitators Feedback Report. Please consider this carefully. This decision cannot be reversed

Continue

If you are an external advisor for a family, you can select "No, I am not a respondent, I am only a facilitator." You will not be able to participate in the survey but you will still receive the Facilitators Feedback Report.

If you don't have a family business, use your family name.

If you are working with a family who doesn't want the identity of each respondent to be shared with the facilitator, tick the box "We do not want a Facilitators Feedback Report". This should be the exception.

**Step 2** Invite family members (**respondents**) by providing their Email addresses and Names/Nicknames. The Basic360 requires a minimum of 3 respondents (including yourself) with no maximum limit.

**Invite respondents**

Email	Name	What's this?
<input type="text" value="kay@fab-learning.com"/>	<input type="text" value="Family_and_Business_Learning"/>	
<input type="text" value="name@example.com"/>	<input type="text" value="Name, nickname or identifier"/>	
<input type="text" value="name@example.com"/>	<input type="text" value="Name, nickname or identifier"/>	
<input type="text" value="name@example.com"/>	<input type="text" value="Name, nickname or identifier"/>	
<input type="text" value="name@example.com"/>	<input type="text" value="Name, nickname or identifier"/>	
<input type="text" value="name@example.com"/>	<input type="text" value="Name, nickname or identifier"/>	

[+ Add more e-mail addresses](#)

**Create survey**

You can continue adding any number of email addresses and names to the survey. Please check that the email addresses are correct.

**FAMILY AND BUSINESS LEARNING**    HOME    **DASHBOARD**    STORE    TOOLS    BOOK    CONTACT    FBNUSER    English

**PAYPAL or CREDIT CARD**    STRIPE

[Continue with PAYPAL or CREDIT CARD](#)

**Step 2** Billing page

1. Enter the promo code (if you have one)
2. Redeem
3. Continue to payment page for the balance (if any) via Credit Card, Paypal or Stripe.

**Billing**

Communication360	
x4	
# of respondents	\$10.00
x4	
# of respondents	\$8.00
x0	
# of respondents	\$5.00
x0	
<b>Total (USD)</b>	<b>\$40.00</b>

**Redeem**    Multiple Promo-Codes?

**Back**

**Step 3** Click [Begin survey](#) on MY DASHBOARD to start your survey.

#### MY SURVEYS

Type	Status	Name	Expiry date	Completed/Invited	Action
Basic360	Active	FBN Comm Exercise	2020-04-15 16:00 UTC	0/4	<a href="#">▶ Begin survey</a> <a href="#">■ Close survey</a> <a href="#">↻ Invite</a> <a href="#">↻ Re-Invite</a> ▶ FFR <a href="#">📄 Analyse</a>

### Invite respondents

Your respondents will each receive an email from **Family and Business Learning** with the subject "You are invited to complete the Basic360 Profile for {your survey name}" with a unique link to complete their own assessment.

**Step 4** **Complete** the Basic360 Profile

There are 20 Family and Business planning action statements you will rate on a scale of 1-4 with

1 = "Strongly disagree" and  
4 = "Strongly agree"

Rate away!

You need to rate each of the action statements before you can move to the next page by clicking **NEXT**.

All 20 action statements with an asterisk\* are required.

#### Family system

In this section, you'll find 10 action statements based on 5 factors of family business planning across the family dimensions. Rate your family and business planning performance based on your first-hand experience (observable behavior) against each statement using a scale of 1 to 4, where 4 = strongly agree 1 = strongly disagree.

All statements marked with an asterisk \* are required.

**Family values**

1. Our family values drive our decision-making. \*

Performance Strongly disagree  1  2  3  4 Strongly agree

---

2. Our family transmits its values to the next generation. \*

Performance Strongly disagree  1  2  3  4 Strongly agree

Back

1 2 3 4 5 6 7 8 9 10 11

Next

## Step 4 Complete the Basic360 Profile

Then answer 6 open-ended Booster Questions to share your family specific thoughts.

All respondents will be reminded that their completion of the Basic360 grants their consent for the Facilitator to view and use the data in family training and planning activities.

This survey should take no more than 20 minutes to complete.

## Step 5 Monitor on MY DASHBOARD (only for the Main user or Facilitator)

- Completed/Invited: track who has or has not completed the survey
- Invite: to add more respondents, and Re-Invite: to re-send the link to respondents
- Close survey: close the survey prior to the expiry date, and even when some respondents have not yet completed the survey
- FFR: view the Facilitators Feedback Report, only when the survey is closed
- Analyse: view your own Individual Feedback Report at any time.

### MY SURVEYS

Type	Status	Name	Expiry date	Completed/Invited	Action
Basic360	Active	FBN Comm Exercise	2020-04-15 16:00 UTC	0/4	<a href="#">▶ Begin survey</a> <a href="#">■ Close survey</a> <a href="#">🔗 Invite</a> <a href="#">🔗 Re-Invite</a> <a href="#">▶ FFR</a> <a href="#">■ Analyse</a>

Step 6 Click **Close survey** on MY DASHBOARD to close your survey any time before the expiry date (default 90 days).

## Step 7 Review your Individual Feedback Report

Once the survey is closed, an email from Family and Business Learning with the subject "The Basic360 Feedback Report for {your survey name} is now ready for your review" and a link to the respondent's Individual Feedback Report will be sent to all respondents.

## Step 8 Review your Facilitators Feedback Report

Once the survey is closed, an email from Family and Business Learning with the subject "The Basic360 FFR report for {your survey name} is now ready for your review" and a link to the Facilitators Feedback Report will be sent to the main user or Facilitator.

You will be able to EXPORT TO PDF or PRINT using the buttons founds at the end of the reports.

## The Basic360 Individual Feedback Report

Sample

### Report 1. You vs Group Overall Performance

Each statement is rated on a scale of 1 – 4 with 1 = "strongly disagree" and 4 = "strongly agree"

	YOU	GROUP
Family system	2.60	2.97
Business system	2.20	2.47

The questions that this score should stimulate are:

What is the **effectiveness** of our overall family and business planning performance

and

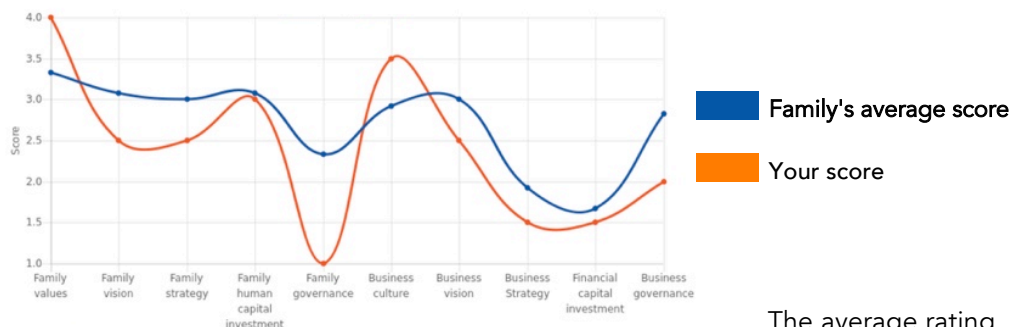
What is the **balance** between our family and business planning performance?



# The Basic360 Individual Feedback Report

Sample

## Report 2. Overall dimensions



The average rating is calculated by combining and then averaging the ratings of the 10 planning dimensions.

	FAMILY SYSTEM					BUSINESS SYSTEM				
	Family values	Family vision	Family strategy	Family human capital investment	Family governance	Business culture	Business vision	Business Strategy	Financial capital investment	Business governance
<b>You</b>	4.00	2.50	2.50	3.00	1.00	3.50	2.50	1.50	1.50	2.00
<b>Group</b>	3.33	3.08	3.00	3.08	2.33	2.92	3.00	1.92	1.67	2.83

# The Basic360 Individual Feedback Report

Sample

## Report 3. Performance Ranking across all dimensions

A chart ranking the importance of the 10 family and business planning dimensions from highest to lowest based on the group's average responses.

	Group	Ranked	You	
3.33	Family values	1	Family values	4.00
3.08	Family vision	2	Business culture	3.50
3.08	Family human capital investment	3	Family human capital investment	3.00
3.00	Family strategy	4	Family vision	2.50
3.00	Business vision	5	Family strategy	2.50
2.92	Business culture	6	Business vision	2.50
2.83	Business governance	7	Business governance	2.00
2.33	Family governance	8	Business Strategy	1.50
1.92	Business Strategy	9	Financial capital investment	1.50
1.67	Financial capital investment	10	Family governance	1.00

The report is designed to provide the family team with more perspectives to think about and discuss their family planning.



# The Basic360 Individual Feedback Report

Sample

## Report 4. Narrative comments on Booster Questions

	Booster questions	Comments
1	What one barrier is preventing your family from planning more effectively <b>for the family</b> ?	You: - Our family planning is fine. Group: - We don't have regular family meetings - I think we need to consider the family more - My older brother makes all the decisions
2	What are the possible solutions for overcoming this barrier to planning <b>for the family</b> ?	You: - Not needed. Group: - We should meet as a family more often
	...	...
6	Is there one action you can take to improve the way your family plans <b>for its business</b> ?	You: - Not needed. Group: - Put more ideas into action - Talk more among family members

6 open-ended  
Booster questions

Designed to help propel your family thinking on improving your family and business planning effectiveness.

# The Basic360 Facilitators Feedback Report

**The Facilitator**, who may be a family member, family business advisor, or consultant, will receive a report showing the profile and identities of each participant.

## Overview of the Participants

Sample

Overall number, list and profile of participants by their Identifier (ID), Name, Generation, Current Role and Gender.

Invited	Completed	Male	Female	Others	Started	Closed
3	3	66%	33%	0%	Jan. 10, 2020, 3:33 p.m.	Jan. 11, 2020

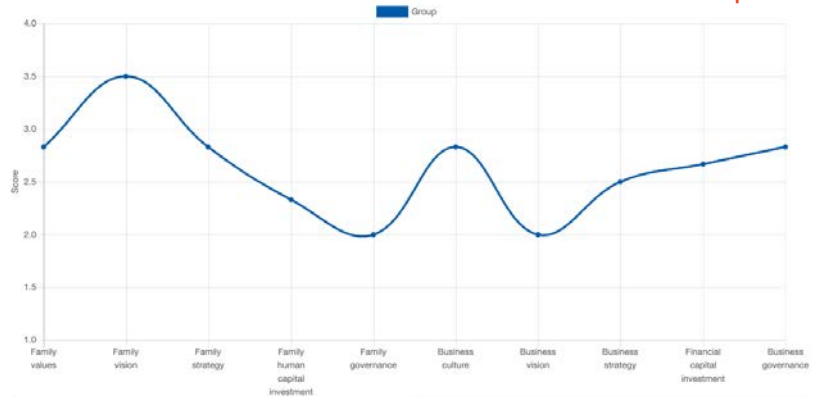
Profile of respondents (Only participants who completed the survey)

ID	Name	Gen	Current Role	Gender
A01	Fabian	G2	4. Family member, owner, employed by the enterprise	M
A02	Gerald	G5	5. Family member employed by the enterprise	W
A03	User	G4	5. Family member employed by the enterprise	M

# The Basic360 Facilitators Feedback Report Sample

## Sample Report

The table shows the group and each individual's score, so you can see how her or his ratings compare with the family.



The colored boxes and outlines help the Facilitator identify areas and individuals to prepare for the discussion.

	Family system					Business system				
	Family values	Family vision	Family strategy	Family human capital investment	Family governance	Business culture	Business vision	Business strategy	Financial capital investment	Business governance
<b>Group</b>	2.83	3.50	2.83	2.33	2.00	2.83	2.00	2.50	2.67	2.83
A01	2.50	3.50	3.50	1.50	1.50	3.50	1.50	2.50	3.00	3.50
A02	4.00	3.50	3.50	3.50	3.00	3.50	3.00	2.50	1.50	2.00
A03	2.00	3.50	1.50	2.00	1.50	1.50	1.50	2.50	3.50	3.00

Figure 2. Overall view of ten Family and Business dimensions showing each individual's response in comparison with the family's average.

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## Step 9 Action Planning

Review the reports and plan a family meeting to discuss.

### Need help?

Go to [www.familyandbusinesslearning.com/faq.html](http://www.familyandbusinesslearning.com/faq.html) or email [kay@fab-learning.com](mailto:kay@fab-learning.com)