

More Than Just Business: Supporting Leaders in the Complex World of Family Enterprises

Sally Derstine, Managing Partner



Delaware Valley
FAMILY BUSINESS CENTER

MEA Leadership Conference
September 18, 2025

mea Better people.
Better outcomes.

DVFBC Team



37
Years

Serving
Enterprising
Families



AGENDA

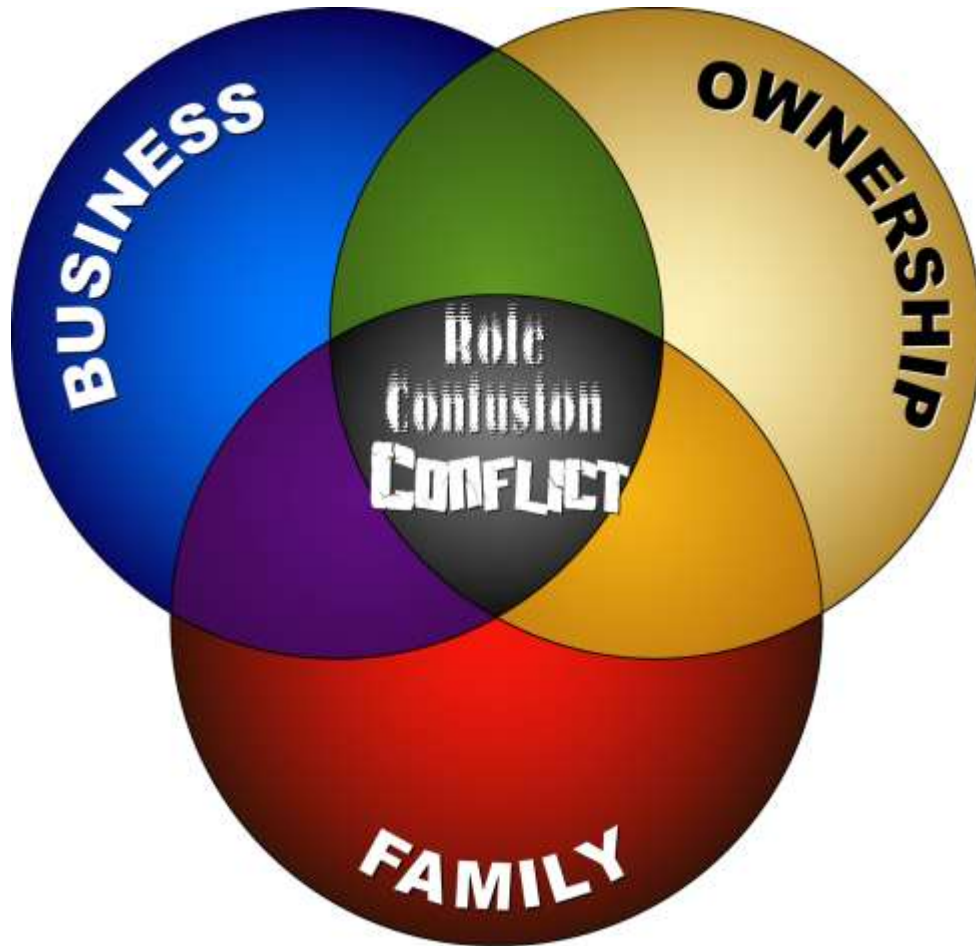
- **3 Conceptual Frameworks**
- **Practical Tools, Tips, Practices of Real Business Families**
- **Connecting & Conversing**
- **1-3 Actions / Takeaways**

Family & Business are two of the most important forces in the world.

When combined, family and business amplify their impact and their complexity.

If you are in a family business, you live and work in this intense nexus and you have insights and experiences that outsiders seldom understand.

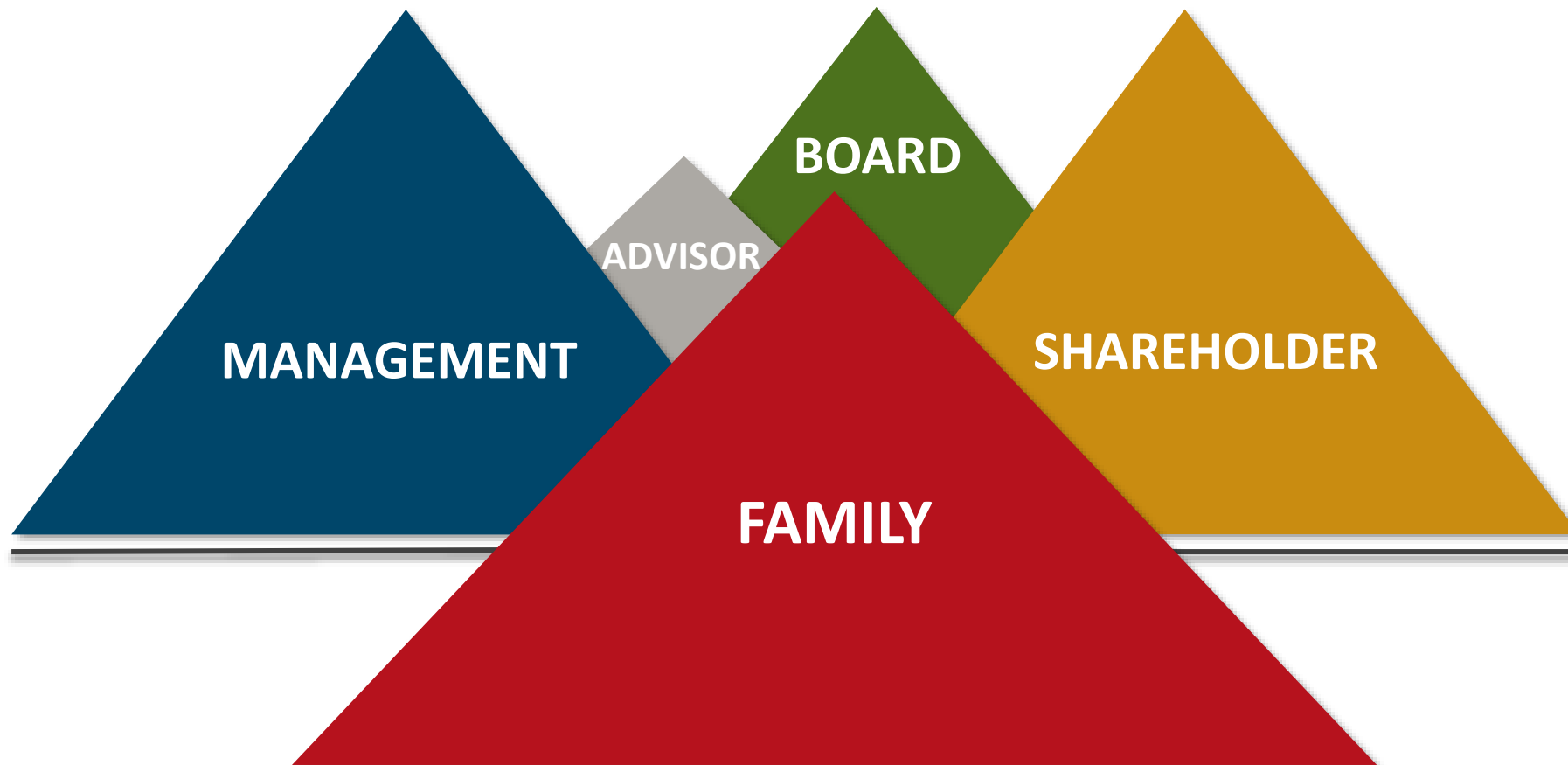
3 Circle Model of Family Business System



- Overlapping Needs, Goals, Roles
- Built-In Confusion

5 MOUNTAIN® Process

5 TEAMS WORKING TOGETHER
With Clear Roles, Responsibilities & Boundaries





LEADERSHIP
DEVELOPMENT

Key Characteristics

Of Impactful 5 MOUNTAIN Teams



TEAM
DEVELOPMENT

MANAGEMENT

Clear Strategy
Culture
Disciplined Execution

ADVISOR

Collaborative
Experienced
Expertise

BOARD

Future Focus
Objectivity
Accountability

SHAREHOLDER

Competent
Committed, Aligned

FAMILY

Respectful, resilient,
intergenerational relationships



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A leader is anyone who
holds themselves responsible
for finding the potential in
people and *processes*
and has the courage to develop that
potential.

- Brene Brown

LEADERSHIP IN FAMILY BUSINESSES

Multi-gen enterprising families
need **BOTH** family and
non-family leaders

Family Business

Team Work

Interior Work



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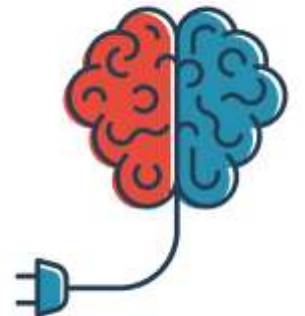
INTERIOR WORK OF LEADERSHIP

Leadership development starts **INSIDE**



Learning to Understand, Love & Trust Yourself

Documenting, then Expressing what you Believe & Stand for

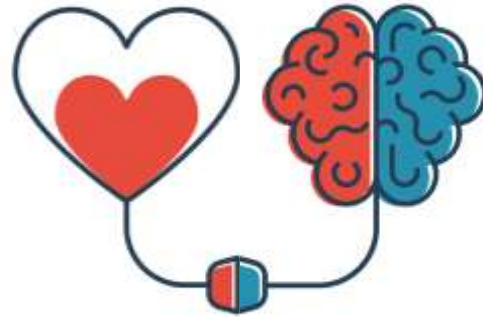


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INTERIOR WORK OF LEADERSHIP

Learning to understand, love, and trust yourself

- Personal assessments
- 1:1 support (coach / therapy)
- Peer groups / support groups
- Meditation / Mindfulness / Journaling



Documenting and expressing what you believe / stand for

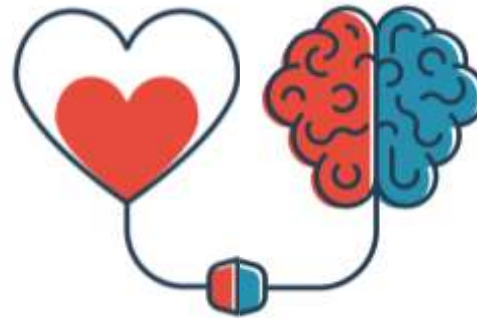
- Personal mission statement
- Core beliefs and values
- Compelling vision / strategic priorities / what unique qualities & skills you bring

Show up as your **WHOLE-HEARTED SELF** in every team interaction

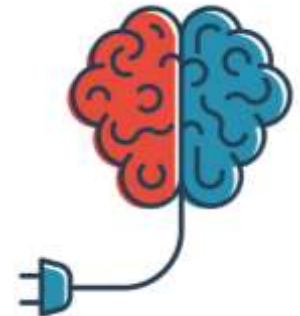
WHOLE-HEARTED LEADERS



- **Curiosity**
- **Courage**
- **Compassion**



- **Accountable**
- **Disciplined**
- **Speak Straight**

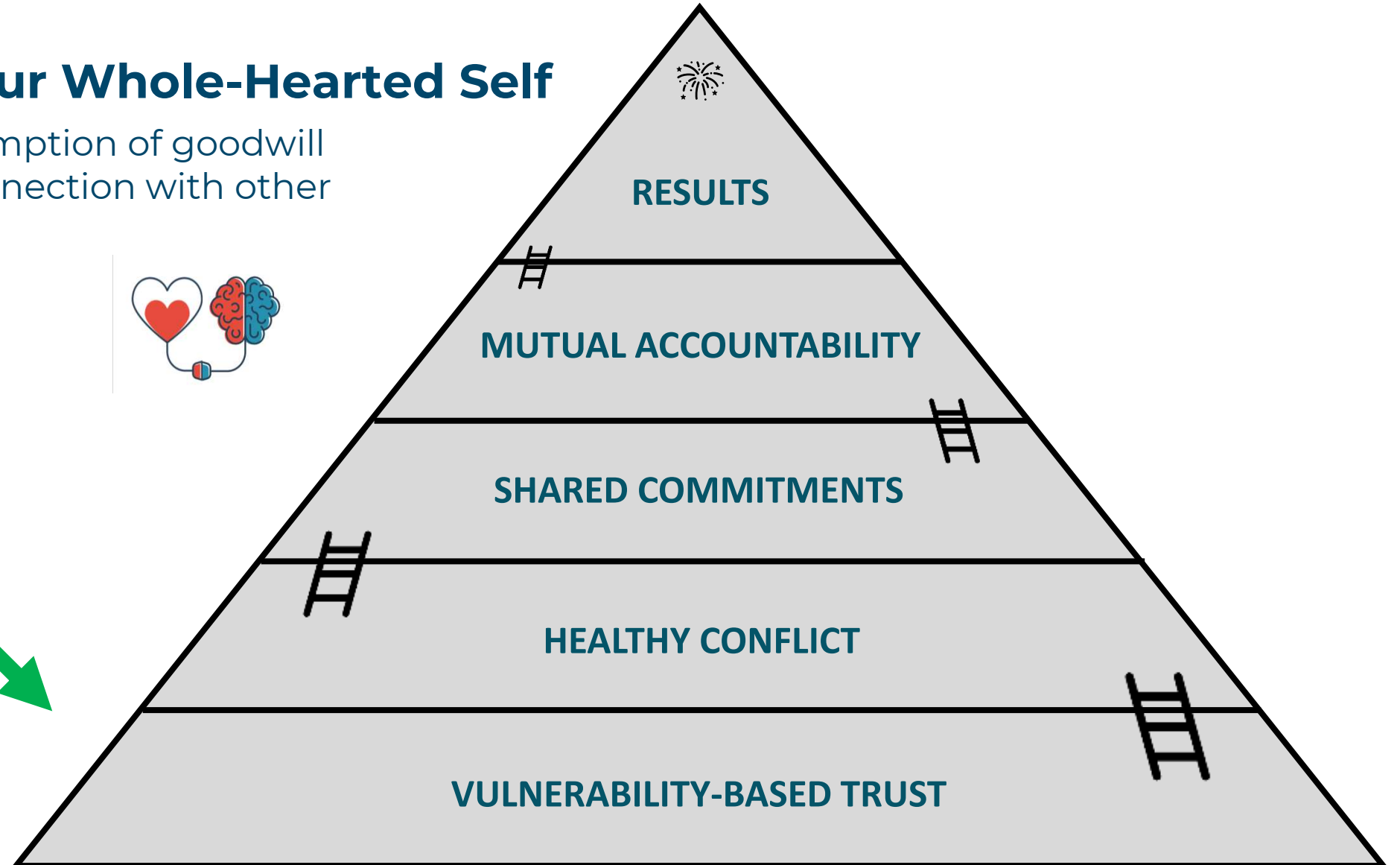
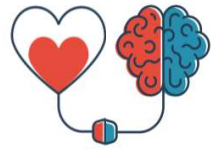
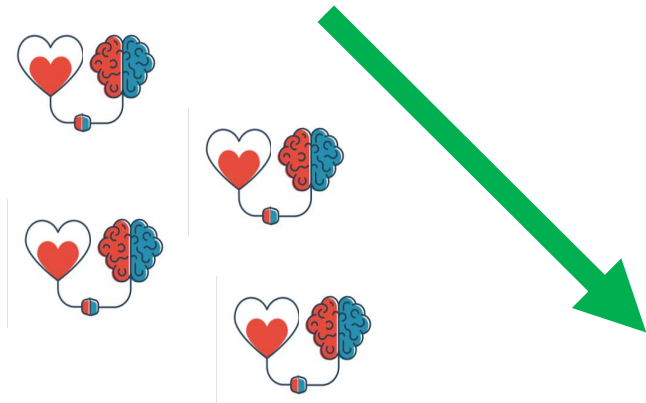


TEAM LEADERSHIP

“Show Up” as your Whole-Hearted Self

- ▶ Maintaining a presumption of goodwill
- ▶ Managing self in connection with other

Recruit Talent



NON-FAMILY LEADERS ... BRING IT ON!

1. **Objectivity** – not encumbered by Family Lens
 - a. **Role Clarity** – Family? Manager? Shareholder?
 - b. **Disagree Well** – go direct vs. triangling; clear is kind
 - c. **Accountability** – not at Family Sunday Dinner
2. **Develop Next Generation Leaders**
3. **Integral to Management Succession & Crisis Planning** – bridge, etc.
4. **Encourage Family Business Best Practices**

EDUCATE & ENCOURAGE

1. Honor Healthy Boundaries

- a. Use first name at work vs. Dad, Mom
- b. Encourage a written *Family Employment Policy*

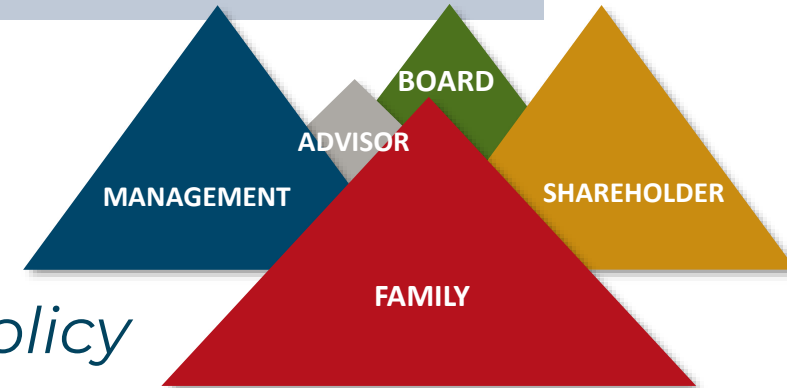
2. Speak Straight

- a. Direct with Respect vs. Triangling

3. Learn from & with Other Family Businesses

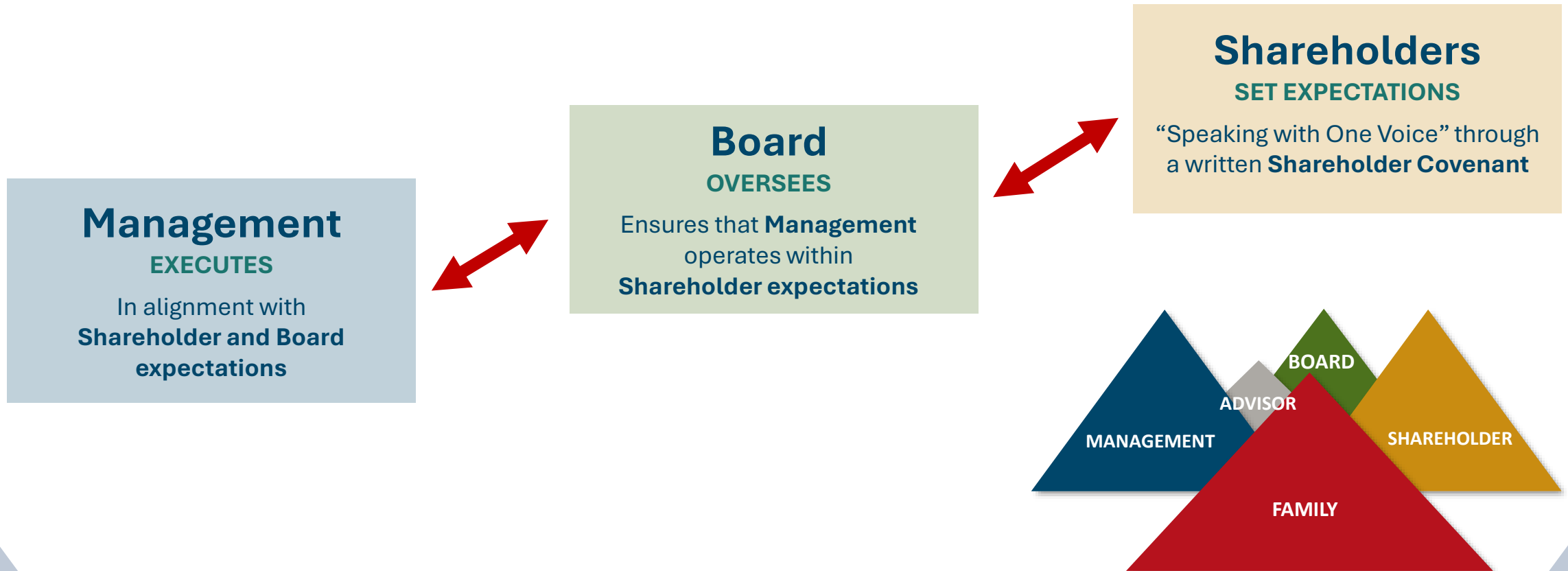
- a. Forum for Enterprising Families
- b. Peer Groups for Enterprising Families

4. Upgrade Advisors and Invite where Gaps



5 MOUNTAIN®

Cascading & Mutual Accountabilities



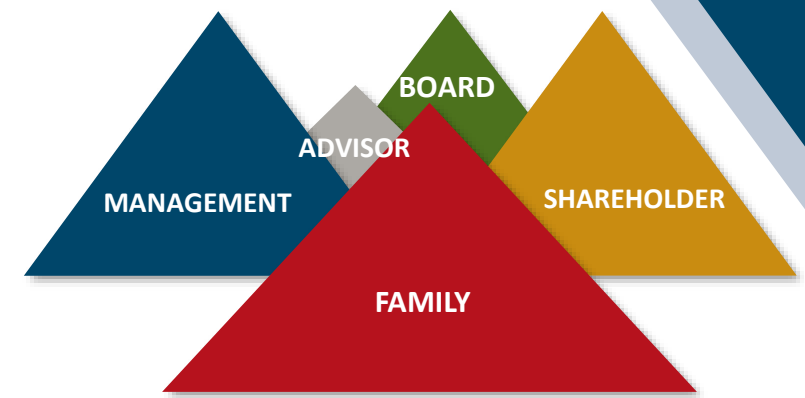
TRANSFORMATION

Businesses are transformed by leaders who are transforming themselves



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YOUR TURN!



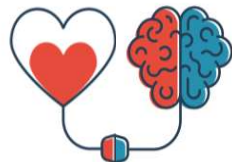
1. Name the MOUNTAIN(s) you're on
2. What's one courageous behavior or skill YOU will engage in to "show up" as a stronger leader in your system?

Learning to understand, love, and trust yourself

- Personal assessments
- 1:1 support (coach / therapy)
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- Mediation / Mindfulness / Journaling

Documenting and expressing what you believe / stand for

- Personal mission statement
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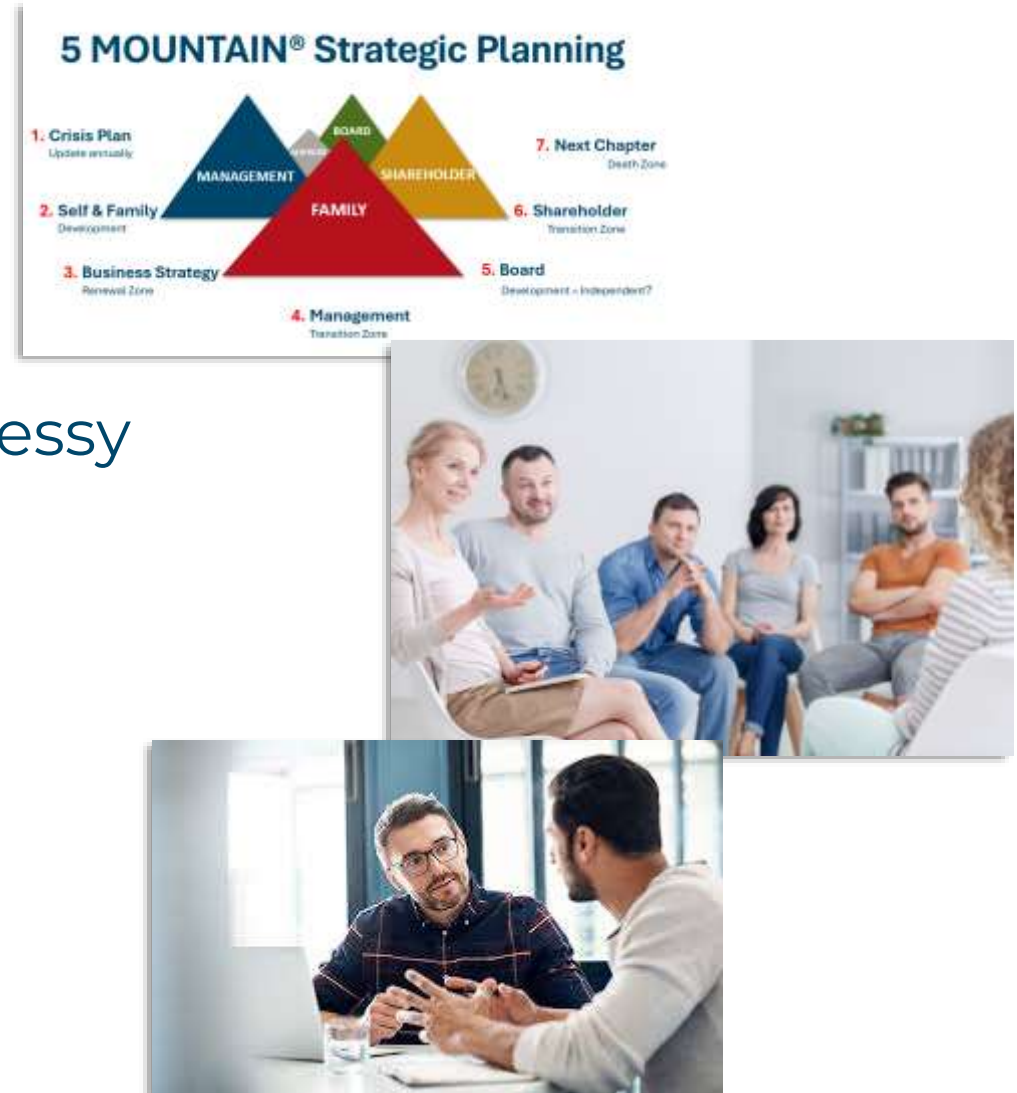
THE VALUE WE PROVIDE

1. Chart a Proven Path Forward to Multi-Gen Success which you define

2. Guide Families through Awkward, Messy Conversations

3. Develop Leaders to navigate 5 MOUNTAIN® Complexity

Assessments ♦ Coaching ♦ Peer Groups





March 27

**Growing, Diversifying,
and Sustaining Your
Family Enterprises**



**Erik Kesting,
G5 CEO & Board Director,
E. Ritter & Company**

**5:00 – 7:30 pm
Tavistock Golf Club**



May 14

**Forging the Path with
Clear Communication
Across the 5 MOUNTAINS®**



**Lisa Daniel, G5 Spouse,
Education Chair & Jay
Daniel, G5 Board Chair,
Lodge Cast Iron**

**11:30am – 2:30 pm
Clemens Food Group**



Sept 25

**From Family Doctor to
CEO to Board Chair**



**Dr. Anne Eiting Klamar,
G4 Board Chair &
Former CEO,
Midmark Corporation**

**8:30 – 11:30 am
Rivercrest Golf Club**



Nov 13

**Spicing Up Governance:
Lessons from TABASCO®'s
Family Leadership**



**Tony Simmons,
G5 former President, CEO
& Board Director,
McIlhenny Corporation**

**8:30 – 11:30 am
Radnor Valley Country Club**







Flourishing Families are the **Foundation** of Sustainable Businesses



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5 Principles for Healthy Generational Transitions

1. All Family Members Count 
2. The Controlling Generation Decides ... Prepares to Let Go 
3. The Rising Generation Steps Up ... Prepares, Invests Time, Chooses 
4. Professional Collaborative Counsel is Essential 
5. It takes Both Generations to Forge a Stronger, Durable Family Enterprise



You Climb We Guide

Guiding Enterprising Families to Climb Higher!



Sally Derstine

Managing Partner

Senior 5 MOUNTAIN® Advisor & Coach

Sally delights in facilitating conversations at the intersection of family, management, and ownership with the outcome of developing healthy family business governance processes and systems. Sally guides the development of clear boundaries and roles – often culminating in structured processes to create teams including energizing Family Councils, aligned Shareholder groups, and high-performing Management teams. In short, Sally charts the path, teaches principles, develops leaders & teams, and guides the path for healthy and sustainable families & businesses. In addition to her role as a lead advisor, she leads the DVFBC team.

Sally is passionate about family business education so families can learn early & together about the complexities, challenges & opportunities they face given their overlapping roles. These intermingling roles & relationships have emotional, strategic & life-altering implications which, if understood, will be easier to navigate. In 1992 Sally was key in launching our Forum for Enterprising Families which continues to gather today for educational Forums featuring successful business families and thought leaders.

A graduate of Eastern Mennonite University and Ashford University, Sally earned a degree in organizational management and psychology. She integrates her invaluable training in Family Systems Theory at the Bowen Center for the Study of the Family in Georgetown into her work. Sally is an 20-year member and a Fellow of the Family Firm Institute through which she earned certifications in Family Business Advising and Advanced Family Business Advising.

Sally and her husband Doug have 3 adult children and three precious grandchildren. Sally enjoys being active in the great outdoors, time with family, and contributing to their church and broader community.