The first year at the helm.

Five decisions, a script for presenting the new leadership and the warning signs to watch in the first twelve months of a family business succession. With a test to see where your company stands today.

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Everyone is watching.

When you take the helm of a family business, the team, clients, the bank and the family itself are waiting for a signal. What you do and say in the first twelve months sets how you will be seen for the next ten.

The first year is not for changing everything. It is for deciding what changes, what stays and how you tell it.

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30.9%

of Spanish family businesses have been through at least one generational handover.

13%

expect the family to keep holding most leadership positions.

1.3%

have reached the third generation.

Sources: Instituto de la Empresa Familiar, "La Empresa Familiar en España 2025"; KPMG and IEF, "Informe de Empresa Familiar 2026".

Most family businesses never reach the third generation.

It is rarely for lack of product or clients. It happens through improvised handovers, conversations that never took place and companies that kept presenting themselves as they did twenty years ago while the market moved on.

Your first year at the helm is when these decisions cost least and show most.

By the end of year one you should be able to answer

- Who decides, and does everyone know it?
- What no longer depends on the founder?
- What does the market see today that it didn't before?

Listen before you move.

The first three months are worth more as reading than as action. Talk to your largest clients, to middle managers and to whoever has been there longest, on their ground and without hurry. Don't announce changes yet.

- What do we do better than anyone?
- What do clients ask for that we can't give them?
- Which decision have we been putting off for years?
- What do you expect from me in this new chapter?

You're on track if

by month three you have a list of what works, what holds you back and what's expected of you, and you still haven't announced anything.

Typical mistake

announcing a plan at your first team meeting.

Separate what depends on the founder.

Make a list in three columns and give each item a date: it passes to you, gets documented or is shared across the team.

- Relationships: clients, suppliers and bank contacts who only talk to them.
- Decisions: prices, hires and investments only they approve.
- Knowledge: processes, craft and history only they understand.

You're on track if

every key relationship has a name and a handover date.

Typical mistake

assuming it will "sort itself out", with no date.

Pick one or two visible wins.

A good first win is visible from outside, achievable within months and doesn't threaten what works: a brand that matches the company, a better sales presentation or a measured first step into another market.

You're on track if

someone outside notices the change without you explaining it.

Typical mistake

choosing a win that can only be seen from inside.

Tell the new chapter.

If you don't explain what is changing, someone else will. One message per audience: what stays, what improves and why. Never the same announcement for everyone.

You're on track if

each audience can sum up in one sentence what changes and what doesn't.

Typical mistake

a single announcement for team, clients and bank.

Protect what works.

Long-standing clients buy trust, relationship and the certainty that things are done properly. Change the form and look after the substance.

You're on track if

no key client is surprised by a change.

Typical mistake

changing a long-standing client's contact without warning.

Tool

Founder dependency map.

Fill it in during the first weeks. Each row is one part of the handover.

What	Type	Decision	Date
Relationship with [main client]	*Relationship*	*Transfer: joint visit*	*Month 2*

Type: relationship · decision · knowledge. Decision: transfer · document · share.

A script for presenting the new leadership.

Each audience has its own question. Answering it well, and in the right order, shapes how the succession is perceived.

Team

Question · **What will change for me?**

What to say · Who decides now, what stays and how decisions will be made.

How · In person, early and with middle managers first. Leave room for questions.

Key clients

Question · **Am I still in good hands?**

What to say · Guaranteed continuity and one concrete improvement you will introduce.

How · A visit, together with whoever has managed the relationship so far.

Bank

Question · **Is the succession solid?**

What to say · A three-year vision, first-year priorities, how management is split and the founder's role.

How · A meeting with a plan and figures.

Market

Question · **Is it still the same company?**

What to say · That it remains reliable and now goes further.

How · Website, materials and public presence consistent with the new chapter.

The order.

- Family and founder: agree the message before it leaves the house.
- Middle managers, then the rest of the team.
- Key clients, one by one and in person.
- The bank, with a plan and figures.
- Other clients and suppliers.
- The market: website, materials and public presence.

Weeks, not months, should pass between the family decision and external communication. If the market hears it from others, you are no longer leading the conversation.

One-sentence template

I received company **with** what makes it strong **. I'm keeping** what doesn't change **. And we're heading to** where we're going **because** reason **.**

Adapt it to each audience: the substance stays, the emphasis changes.

Warning signs in the family.

Almost every succession conflict can be seen coming. These are the most common signs.

- « Company decisions are debated at family meals.
- « The team gets contradictory instructions from two people.
- « Nobody dares to discuss the founder's future role.
- « A relative hears about a change from someone else.
- « Siblings with overlapping responsibilities.
- « Relatives outside the business who receive no information.

If you see two or more.

Name each person's expectations, separate ownership, governance and management, and give the founder a clear role with a date. Come to the family with arguments, not hierarchy. Family protocols and shareholder agreements are the domain of your lawyers and advisers.

Test

Where does your company stand today?.

Tick what is true today. Be honest: nobody else will see your answers.

- ☐ Key clients call me, not only the founder.
- ☐ I know which relationships and decisions still depend on the founder.
- ☐ The team knows who decides and how.
- ☐ The bank knows my three-year plan.
- ☐ Our website and materials represent what the company is today.
- ☐ The whole sales team describes the company the same way.
- ☐ I can explain in one sentence why clients choose us.
- ☐ Everyone's role in the family is clear.
- ☐ I have one or two visible wins planned for this year.
- ☐ I know which market or segment to grow into next.

8–10

You're ahead. Time to refine and accelerate.

4–7

A solid base, with gaps that already show from outside.

0–3

The succession still runs on inertia. This is the best moment to put it in order.

Send me your score and the boxes you didn't tick. I'll tell you where I'd start.

Twelve months.

Months 1–3 · Listen	Conversations with clients, team and family. Dependency map. No big announcements.
Months 4–6 · Tell	First visible win. Presenting the new chapter to team, clients and bank.
Months 7–9 · Order	Handover of relationships and decisions. Founder's role agreed, with a date.
Months 10–12 · Project	Review what you've learned. Year-two priorities: brand, sales or new markets.

What this guide can't do for you.

- See your company the way someone who doesn't know you sees it.
- Compare it with how your competitors present themselves.
- Tell you which of these decisions comes first in your case.

That takes an outside view.

RINATA Diagnostic.

One week. Fixed price. By the end you'll know what's holding your company back and what to change first.

- Brand and perception review
- Commercial and sales review
- New-market potential
- 12-month priority plan

Every month your company looks like less than it is, an opportunity is left on the table.

Make it clear who's leading now.

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Write to me with the subject "Diagnostic", or send me your test score.

I reply personally, within 48 hours. Discretion from the very first message.