

# Roadmap · Desarrollo de Successor

Currículo 3-5 años para heir Tipo B

**Cómo usar:** este roadmap está diseñado para heir «Tipo B» — con potencial pero sin experiencia relevante. Ejecutado consistentemente sobre 3-5 años, transforma un heir joven en successor capable de continuar el legado familiar. Skip fases o accelerate = risk material para business.

## Fase 1 · Años 1-2 · Experiencia externa

El heir trabaja en OTRA empresa (idealmente en la misma industria o industria relacionada). Objetivo: aprender operations + business sin the crutch de ser «hijo del owner». Roles progresivos junior → mid-level. Reports to non-family boss. Comes home eventually with humility + external perspective + credibility.

- Job placement en empresa non-familiar (2 años mínimo).
- Rol progresivo: entry level año 1, promotion o cambio expansión año 2.
- Reports to non-family boss + peer evaluation.
- Documenta learnings específicos aplicables a family business.
- Networking dentro de industria para futura reference.

## Fase 2 · Año 3 · Ingreso a family business (junior role)

Regresa a family business en rol operational (NO ejecutivo yet). Sales, operations, o project management típicos. Reports a manager NO padre. Owner trata como cualquier empleado. Objetivo: aprender el business específicamente from bottom up, sin la interpretation filtered de padre.

- Rol operational (sales, ops, project mgmt) — NOT executive.
- Reports a manager non-family.
- Salary competitive con mercado (NO nepotismo salary).
- Performance reviews formal como todo empleado.
- Rotación por 2-3 departamentos over 12 meses.

**Fase 3 · Año 4 · Middle management + mentorship**

Promoción a middle management (department head, regional manager, or similar). Ownership de P&L específico. Owner comienza mentoring 1-on-1 más intencional. Introduce a key relationships: banker, attorney, CPA, key customers, key suppliers. Board observer si applicable.

- Promoción a middle mgmt con P&L ownership específico.
- Mentorship 1-on-1 con owner (1-2 hrs/semana).
- Introducciones a banker + attorney + CPA + key relationships.
- Board observer si business tiene board.
- Presenting a management team + engaging strategic discussions.

**Fase 4 · Año 5 · Senior leadership + transferencia decisiones**

COO o similar senior role. Managing multiple departments. Owner cede operational decisions progresivamente — pero retains strategic control. External executive coach recommended para senior transition skills. Board member (full seat, no observer). Client relationships transferidos.

- Senior role (COO, president, GM) con broad P&L ownership.
- Owner cede operational decisions gradualmente.
- External executive coach 1-on-1 monthly.
- Full board seat con voice + vote.
- Key client relationships transferred to successor.

Fase 5 · Año 6+ · CEO transition

Formal transición a CEO role. Owner transitions a Chairman emeritus (voice but not vote on operational decisions). Estate structure (IDGT/GRAT) facilitates ownership transfer en paralelo. Board añade external members para governance discipline. Family council coordina decisions across multiple stakeholders.

|   |                                                             |
|---|-------------------------------------------------------------|
| ■ | Formal CEO transition ceremony (announcements + comm plan). |
| ■ | Owner → Chairman emeritus role.                             |
| ■ | IDGT/GRAT execute ownership transfer paralelamente.         |
| ■ | External board members added (2-3).                         |
| ■ | Family council setup para inter-family coordination.        |

## Advertencias críticas

- Skip fases = risk material. Heir sin external experiencia frecuentemente fails.
- Sin external mentor: owner dominance impide real growth del heir.
- Sin competitive salary: creates entitlement + resentment en other employees.
- Sin performance reviews formal: heir doesn't develop critical self-awareness.
- Sin board discipline: family dynamics dominate business decisions unhealthily.

*Este roadmap requires committment de 5-6 años del owner + willing del heir. Sin ambos: sucesión familiar rarely funciona. Alternativas legítimas: MBO, venta a tercero, ESOP. Empujar sucesión familiar sin readiness = disaster para business + family relationships + heir personal well-being.*