



Family Business Boundary Assessment

Are Your Boundaries Strengthening Your Business or Straining It?



Use this as a simple way to assess clarity, expectations, & communication in your family business. In just a few minutes, you'll uncover gaps where structure can reduce tension & strengthen leadership.

Meridian Associates | Blessing Family Businesses Across Generations
(817) 594-0546 | AskMeridian.com

Rate each group of statements based on how true they are overall in your business today.

1 = Not true at all

2 = Sometimes true

3 = Mostly true

4 = Consistently true

1. Decision Clarity

___ We are clear on who makes which decisions in the business

___ Leadership roles and authority are well understood

___ We avoid revisiting decisions due to confusion or overlap

___ Strategic decisions follow a consistent process

Total score: ___

2. Family Employment Expectations

___ There are clear expectations for family members in the business

___ Roles, responsibilities, and performance standards are defined

___ Family members are held accountable just like other employees

___ Advancement is based on performance, not assumption

Total score: ___

1 = Not true at all, 2 = Sometimes true, 3 = Mostly true, 4 = Consistently true

3. Separation of Conversations

- ___ Business decisions are discussed in appropriate meetings (*not everywhere*)
- ___ Family time is protected from operational business conversations
- ___ We have a structured time to discuss family-related business topics
- ___ Emotional concerns are addressed proactively, not during conflict

Total score: ___

Your Boundary Strength Score:

40–48 → Strong Boundaries

You have clear structure in place, which allows both the business and family relationships to operate effectively. Continue refining and maintaining these systems as you grow.

28–39 → Some Clarity, Some Gaps

You likely have informal systems that work, until they don't. Strengthening structure now can prevent future tension and create more consistency in leadership.

Below 28 → Boundaries Are Likely Creating Tension

If decisions feel personal, expectations feel unclear, or conversations happen everywhere, your business may be operating without the structure needed to support long-term success.

Reflection Questions

Use these to spark conversation:

- Where do we feel the most confusion today... decisions, roles, or expectations?
 - What conversations tend to happen in the wrong setting?
 - What expectations have we assumed... but never clearly defined?
 - Where would more structure reduce tension right now?
-


Your Primary Gap

After completing your Boundary Assessment, look at your three section scores:

- **Decision Clarity** 
- **Family Employment Expectations** 
- **Separation of Conversations** 

Whichever section has your lowest score is your Primary Gap.

This is where improving structure will create the fastest and most noticeable impact.

 Read on to see how to fix it!

If Your Lowest Score is: Decision Clarity

What this means:

You may be experiencing confusion around who makes decisions, when input is needed, or how final calls are made.

What it often feels like:

- Decisions get revisited or second-guessed
- Conversations drift without clear outcomes
- Leadership authority feels unclear or inconsistent

What's likely happening:

Roles and decision rights haven't been clearly defined or consistently followed.

Focus here first:

Clarify who decides what and how decisions are made.

Even small improvements in decision clarity can quickly reduce frustration and increase momentum.

 Your Next Step is on Page 7!

If Your Lowest Score is: Family Employment Expectations



What this means:

Expectations for family members in the business may be unclear, inconsistent, or assumed rather than defined.

What it often feels like:

- Questions around fairness or favoritism
- Uncertainty about roles, promotions, or accountability
- Tension between family and non-family employees

What's likely happening:

Standards for joining, performing, and advancing in the business haven't been clearly documented.

Focus here first:

Define what it takes to join, grow, and lead in the business.

Clarity here builds trust, both inside the family, and across the organization

! Your Next Step is on Page 7!

If Your Lowest Score is: Separation of Conversations



What this means:

Business and family discussions may be happening in the same spaces, causing conversations to blur and emotions to rise.

What it often feels like:

- Business topics show up during family time
- Emotional conversations spill into business decisions
- It's hard to “turn off” work discussions

What's likely happening:

There aren't clear boundaries around when and where different types of conversations take place.

Focus here first:

Create structure around when and where conversations happen.

Protecting space for both business and family strengthens both.

! Your Next Step is on Page 7!

Next Step

Healthy boundaries don't happen by accident, they're built through clear structure, shared expectations, and intentional leadership.

If this assessment revealed gaps, that's not a problem, that's clarity. Clarity is where progress begins. **The good news? You don't have to fix everything at once.**

Most families see meaningful improvement by focusing on one area at a time, starting with their Primary Gap. If you'd like a fresh perspective in thinking through your results, Meridian can walk through this with you and identify practical next steps.

Many families choose to go further through our **M-Power™ program**, where we clarify decision-making, strengthen leadership alignment, and build the structure needed for long-term success, both in the business and at home.

Contact our office at 817-594-0546 to start the conversation