

COVER TO COVER

Family
HOW ↓ BUSINESS HISTORY BOOKS ARE BUILT


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Whether or not your children or grandchildren are actively involved in running the family business, younger generations can benefit enormously from learning the true story of how the enterprise began. Understanding the roots of the family's entrepreneurialism will cultivate stewardship and deeper appreciation of the wealth and responsibilities generated by long-term success.

For someone born long after a company's founding, peeling back the years and imagining a grandparent or great-grandparent's colossal struggles to get the business off the ground can be tough. That's where family business history can play a valuable role, by bridging the gap between Gen 1 and later generations.

What Good History Can Do

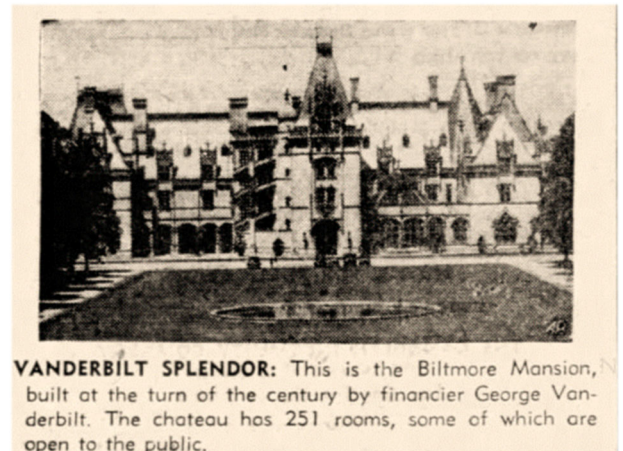
- **Educate** younger family members about their shared heritage.
- **Convey** the values and work ethic of the founding generation.
- **Reinforce** family philanthropic philosophy and stewardship.
- **Acknowledge** the critical role of risk-taking, missteps, luck, timing and persistence in any worthwhile endeavor.
- **Underscore** that the family's financial blessings did not simply fall out of the sky; someone worked hard to create the wealth.
- **Supply** meaningful business and life lessons by separating fact from fiction, truth from legend.
- **Reveal** the human side of the generation that founded the business. The formidable great-grandparent staring down from an oil portrait in the boardroom was once a child who probably scraped his knees, almost burned down the family barn with his electrical experiments, wept when an adored sister died of polio at the tender age of six, loved fast cars and grew up to sport a straw boater, bowtie and hip flask during his bachelor dandy days in the Roaring '20s. (Take a fresh look at that boardroom portrait and you'll swear great-grandfather is winking slyly!)
- **Provide** a sense of continuity and a source of real pride for the younger generations, including—or perhaps especially—those who have no hands-on connection to the family business, yet are benefiting materially from its success.



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Cozy Cabin or Oceanfront Mansion?

The process of creating a book is similar to the sequence of steps used to design and build a house. The final product can be as simple or fancy as you please, but certain components are necessary regardless of whether you're building a cabin or a mansion.



Firm Foundation

Among the key questions that need to be answered sooner rather than later:

- **Who** is the audience? Family only? Employees? Customers? General readership? A combination?
- **What** is at the heart of main story? The founder's life? The business? A balance of both?
- **Why** is this particular story worth telling? What's the mission?
- **How** should it be told? In the first-person, perhaps by the founder? In the neutral third person, by a historian?
- **Where** will you find illustrations? Do you have a family or company archive? Who will gather and choose the photos?
- **When** does the book need to be ready? Is there an occasion coming up? Or is the project open-ended?

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High Quality Building Materials: Research

Any serious history is based on serious research. Sources of historical material can range from official corporate archives, to online repositories, to stuffed boxes of photos and memorabilia tucked away in a storage closet or basement.

The research phase provides the “invisible infrastructure” of a book—a strong, flowing storyline, backed by an army of facts and insights. It is, hands down, the longest and most labor-intensive stage of any book project.



Research provides not only vital facts and milestones, but also contributes valuable historical color and context that make the story readable and relatable. A thorough research process will dig out unknown gems, long- forgotten incidents and tantalizing period details in old newspapers, industry journals, annual reports, letters and more.

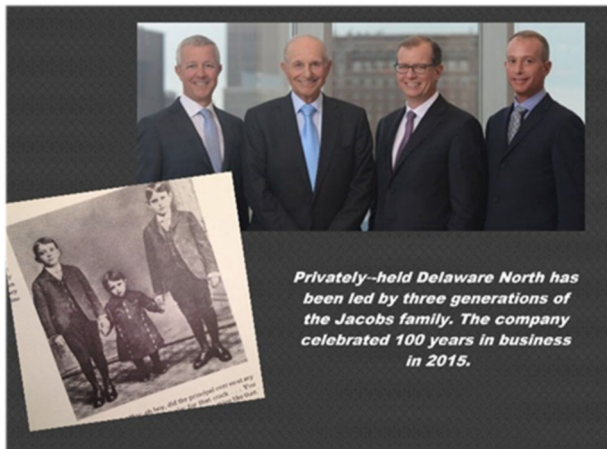
Two “trails” combine to create the best research materials to ground any credible history:

- **The paper trail:** documents of every imaginable kind.
- **The people trail:** interviews with key people who can fill in the meaning and importance of events and developments.

Research, Research, Research, continued

In a typical book project, the “paper trail” constitutes 80 percent of the research; the “people trail” supplies the remaining 20 percent.

Don't skimp on this phase of a history project. You're not likely to



put together a new book every five years, so it pays to view the research (and the book) as a worthwhile and long-lasting investment in the family and the business.

Give careful thought to the list of people to be interviewed. Who is best

equipped to explain different eras or threads of the business? Who can shed light on the thinking behind major decisions? Who will be able to talk about the business in the larger context of its industry or its market?

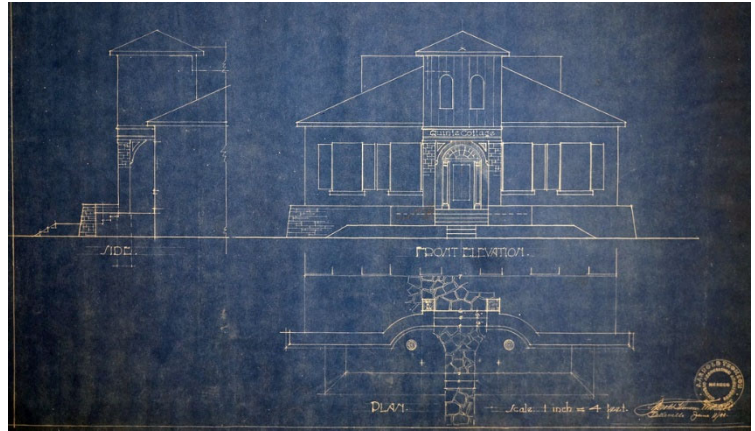
Interviews with key players typically last 60-90 minutes, are recorded (usually audio, but video is certainly possible) and then transcribed professionally.

Multiple sessions with someone crucial—such as the company founder—are normally spread out over several weeks or months to allow time for reviewing transcripts and creating thoughtful follow-up questions. Many interviews can be done by phone, if needed or preferred.



Blueprint: The Book Outline

While the long research phase is underway, a rough idea of how best to assemble the story begins to bubble up. Certain moments or milestones jump out as ideal chapter anchors. Most books unfold largely in chronological fashion, but any good story is peppered with teasers— anecdotes and insights that foreshadow events to come or showcase uncanny parallels between someone’s tough childhood and her later business success.



As research winds up, the process of preparing a detailed outline of the book begins. The document will serve as the blueprint (or roadmap, if you prefer) for writing the manuscript. The outline might run anywhere from 15 to 30 pages and include bulleted lists of topics

likely to be covered in each chapter. This phase is a critical one. If you have any concerns about content, emphasis or tone, now is the time to share your thoughts so the outline can be adjusted before any writing begins.



Construction: Drafting the Manuscript

Of all the phases that go into a book, the drafting of the manuscript is most like constructing a house. A solid book isn't written chapter by chapter—any more than a house is built room by room. The subfloor and floor go in throughout the house. Walls are framed. Electrical, heating and other systems are added before walls are plastered. Layer after layer of infrastructure goes in before any painting or trimming. The same applies to a book. A tightly woven narrative is built as a whole, from the ground up.



Every historian has his or her own methods, but a typical drafting process begins with assembling the research roughly in the order of the approved outline. Then a first pass at a draft follows. More detail is added with each successive pass. Sometimes stories will be moved around to spots where they shine more light or add more drama. Information gaps can crop up that might require a bit of research or a quick phone call for further clarification.

The Punch List: Editing

If the book team has been doing its homework all along, there should be no unwelcome surprises during the final editing phase. Editing should consist mostly of fact-checking, tweaking a story or two, double-checking names and working in a few last-minute details about Great-Aunt Martha's brief but stellar success as a bootlegger during Prohibition.

Landscaping and Décor: Designing and Printing the Book

The last phase of the project can be the most enjoyable for clients—working with a designer to create the lay-out and choose the overall look of the book. By this point in the process, someone has usually pulled together an interesting universe of photos, graphics, old ads, letters, newspaper headlines and other memorabilia from which to draw. Illustrating a book is not a quick-and-easy task, but it can be a fun process. A thoughtful arrangement of photos (usually with captions) is a worthwhile investment of time and often supplies an entire storyline of its own.



Early in the design phase, the client has an opportunity to consider a range of choices in paper, fonts, covers, binding and more. It's worth hiring a professional designer who will read the manuscript, ask questions, listen to your ideas and develop at least three prototype layouts for consideration. Many designers will arrange printing services and work directly with a print house on quality checks.

Voila! At the end of a process that typically takes anywhere from 12 to 30 months from start to finish, the long-anticipated book will make its debut. To continue the home construction analogy, it's the perfect time to throw an Open House to celebrate and show off your finished project.

Pitfalls, Potholes and Booby Traps

- Few projects (or home builds) ever go entirely according to plan, schedule or budget. Be prepared to hit a few bumps along the way.
- Every book project is wonderfully unique. Steer clear of a cookie-cutter approach.
- Shortcuts rarely pay. You're probably not going to undertake another history book for at least a generation, so give it your best.
- Too many cooks spoil the broth. Consider keeping the book team small and focused.
- Stay on track by being available to the project historian when he or she needs documents or clarification.
- Ask questions. Problems can be avoided if a client asks tons of questions early on, rather than hesitate to speak up.
- Include the lumps, bumps, mistakes, missteps, bloopers, fights and controversies. The best and only truly useful history offers real-life lessons in resilience, humility and persistence. Celebrate the hardships and learn from them!



Kathi Ann Brown founded Milestones Historical Consultants, LLC in 1987 to help businesses, associations and other organizations preserve and profit from their past. She became a FOX member advisor in 2019.

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