

The **First 90** Days:

How to Onboard a C-Suite Executive into a Privately-Held, Family-Owned Company



Bringing a new C-level leader into any organization is a pivotal moment for its culture, but when the company is family-owned, the stakes and subtleties are even greater.

Privately held, often multi-generational, family businesses tend to operate with deep legacy, unwritten rules, and a highly relational culture.

So while a new CEO or other C-suite executive may come equipped with functional expertise, success hinges just as much on how well they navigate culture, trust, and ownership dynamics ***especially in the first 90 days.***

At CarterBaldwin Executive Search, we know firsthand how critical it is to select the right executive and ensure their onboarding is intentional, thoughtful, and successful. The following five crucial steps prepare your executive and your team for a strong start during the first 90 days.



STEP ONE

Start with Clarity - Both Strategic and Cultural

Too often, onboarding focuses on tasks and systems. But the more essential work is clarity around:

- **What success looks like in 90 days, one year, and beyond**
- **How decisions are made, both formally and informally**
- **Where the landmines lie such as unspoken history, family dynamics, or sacred cows**

Set expectations explicitly with the CEO, Board, and key family stakeholders. If there are tensions between legacy and growth, be honest about them.

STEP TWO

Pair the Executive with a Culture Translator

Assign a trusted senior leader or board member (not necessarily from HR) to act as a “culture guide.” Their role isn’t just to explain company history, but to help the new executive read the room:

- **Who really holds influence?**
- **What signals respect?**
- **When should they push versus pause?**

This mentor helps the executive avoid cultural mistakes and accelerates integration and trust.

STEP THREE

Don't Skip the Foundations

Private companies sometimes skip formal onboarding processes—but resist the urge to “just let them run.” The best companies create:

- **A structured 30-60-90 day onboarding plan**
- **Scheduled check-ins with both executives and family leaders**
- **Deep dives into the business model, key customers, and culture**

Even seasoned leaders need context before driving change.

STEP FOUR

Invest in Relationship Capital

In family-owned businesses, trust is earned relationally—often over time, meals, and shared stories. Encourage your new leader to:

- **Spend real time in the field or on the shop floor**
- **Listen first, speak last**
- **Meet with owners one-on-one to hear what matters most to them**

Early wins are important, but lasting credibility comes from how they show up, not just what they execute.

STEP FIVE

Align Around Change Before Driving it

Many family businesses bring in outside executives to lead transformation. That's valid, but dangerous if not aligned. Before launching major changes, the new leader should:

- **Present their initial observations and test assumptions**
- **Co-create priorities with the CEO and ownership**
- **Ensure they're solving problems the company wants solved**

Otherwise, even good ideas can land as cultural missteps.

BOTTOM LINE

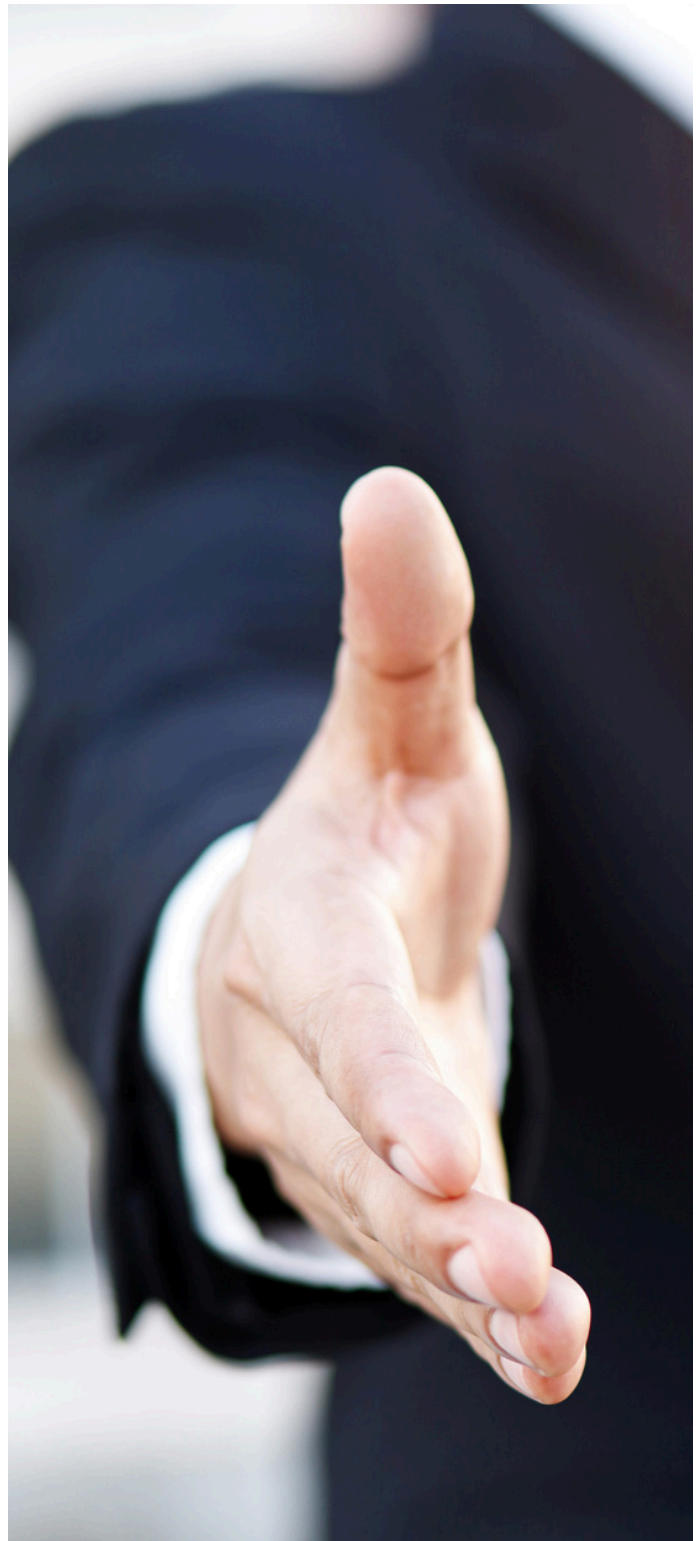
In a family-owned company, onboarding isn't about speeding up, it's about slowing down to go fast. Thoughtful integration, relational equity, and strategic alignment in the first 90 days create the foundation for years of high-impact leadership. **When handled well, onboarding a C-suite executive isn't just a transition, it's a transformation.**

Privately-held and family businesses are built on trust, and so is our approach to search.

**At CarterBaldwin, we don't
just fill roles, we help our
clients find transformational
leaders who thrive in complex,
high-trust environments.**

We are here to assist as you look to find those select next executives who will honor your legacy and help drive and lead your business into the future.

Go to **www.carterbaldwin.com** and click on the "Connect with us" button to start a conversation.



25
years

carter
baldwin
search done better™

About the Author

Jennifer Sobocinski is a Founding Partner of CarterBaldwin Executive Search. She has achieved national recognition for her expertise in executing CEO and other c-suite searches for both public and private clients ranging from privately held/emerging enterprises to Fortune 1000 companies.

With 25 years of executive search experience, she has worked across all industries. She has also successfully partnered with numerous Boards of Directors of privately held (often family-owned) businesses across the country to recruit their first executive leaders, ranging from the CEO to the necessary supporting leadership team. Under her leadership, CarterBaldwin has been named twice to the prestigious Inc. 500 list of fastest-growing privately held companies and is consistently recognized among the top 50 retained firms nationally.

The recipient of numerous awards in the search industry, Jennifer was also recognized by *Catalyst Magazine* as being among Atlanta's Top 50 Entrepreneurs.

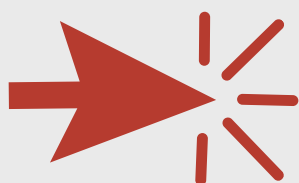
She holds a BS in international business with a minor in finance from Auburn University.



Jennifer Sobocinski

Founding Partner

jsobo@carterbaldwin.com



See previous client successes and learn more about CarterBaldwin's work in private equity, technology, industrial, and distribution & logistics sectors at carterbaldwin.com.