

# Spousal On-Boarding

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Every family is somewhat like a secret society or an exclusive club. We know these clubs are out there, and maybe we would like to belong to one. However, we don't know how or where to apply. We also have no idea if we will be accepted once the application is in. And ironically, if we are accepted, we then discover that no one told us about the secret language, rituals, meeting places, hierarchy and 1000-page rule book! There is even more complexity to the culture of those families who stand out from the norms, either by their significant wealth, their family legacies, or the uniqueness of certain personalities.

## What is the difference between being “married into” and “born into” a family?

The difference is very much like being raised from birth to speak Finnish compared to learning Finnish at 30 years of age. When we are born into a language, we do not really know we are learning it. It just happens over time. Before you know it, we speak Finnish! At 30 years old, learning any new language will be determined by the patience of our teachers; our tolerance for feeling ignorant and our interest in learning; everyone's ability to laugh with us, not at us; and time, lots of time.

## What is Spousal On-Boarding?

Spousal On-Boarding is simply the process of inviting new members of our family into a place of belonging and significance amongst us. This is most obviously applied to recently engaged, married or common-law partners – our own, or those of our siblings or children; that is, our in-laws. It also may apply less directly to our new spouse's other family members. From this point of view, it is impossible to not on-board this new family member. The only question is, will this be a constructive inclusive process or will it feel more like CIA waterboarding?

## Is a formal process better than an informal process?

A formal process of on-boarding is akin to language classes followed by full immersion into a new land. An informal process is simply full immersion, learn as you trip along. For the majority of families, on-boarding is informal. Notably, most of the challenges family members experience with their in-laws can be traced back to poor on-boarding. We simply expect our new members to play by the rules, and they don't. They come late to events when we come

early; they drink too much or too little; they spend too little or too much; they take offense at our father's sense of humour; they don't understand how we manage our disagreements; they keep strange work hours; then, to top it off, they ask about really taboo subjects. To answer the question, formal is not always better – it is simply more efficient and entails less confusion and trial & error bruises.

## When is formal Spousal On-Boarding particularly important?

Formal Spousal On-Boarding is essential when multiple generations of your family co-own significant assets or co-manage family businesses. This is because of the greater inter-dependencies, greater frequency of interaction and greater consequences of poorly managed family processes.

## What is involved in successful formal on-boarding?

- The overt mentioning of on-boarding: “We like to sit down with new family members and share about our family life, and some of what we have learned works well for us. This may help you get used to our family ways a little faster.
- Clarity about your family's unwritten rules: How you resolve conflict; how you make decisions; your particular values and practices regarding spending time together, money management, drugs and alcohol, work practices; your taboo subjects, etc.

- Introducing family business or significant family assets: Business history, current realities, roles and future succession plans; ownership structures and agreements; guidelines regarding the family's use and benefits flowing from business and other assets; opportunities and guidelines for the involvement of non-bloodline family members; the history, rationale and practice of pre-nuptial agreements.
- Sharing some of the family lore and stories: This helps the new member get the "why" behind the unwritten rules. For example, our parents' upbringing during WWII and the formational values regarding saving money.
- Deciding who is involved: Some family members may be more effective and better suited to participating in these conversations. Particularly shy, anxious or dominant types may want to leave this introduction to those who are more comfortable sharing without controlling or judging.
- Acceptance of differences: An essential component of successful on-boarding is the recognition that every family is unique. Your particular culture has its strengths and its weaknesses. Your new member's "family of origin" also does, offering to enrich and diversify the overall family experience.
- Deciding on the venue: a one to one over coffee; after dinner with many joining in; a "cheat sheet" of bullet points; an agenda item of a formal family meeting; integrated into governance practices of your family enterprise. All are good choices when they are managed well.

### What do we do with the "out-laws"?

Every family has in-laws who simply refuse to go with the party line, and who may even seem to take pleasure stirring things up (i.e., your "out-laws"). Usually this will be tolerated as simply the way it is, without any real or serious consequences. In these cases, it may also be helpful to remember that this new family member is probably just speaking a different language, most likely one that they learned from birth in their family. From this point of view, theirs is not a bad language, just different and perhaps exotic. Occasionally, the fit between your family culture and the newcomer's ways is so contrary, in such conflict, that it must be addressed upfront. Once again, families with significant interdependencies with wealth or business can feel particularly vulnerable to disruption. This can be very challenging, requiring the utmost skill at listening and sharing expectations and needs. Some families will seek professional guidance to maximize the success of this difficult conversation.

However in all cases, we can hope to say, "All aboard!"

**\*The views in this document are those of the author.**

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