

Honey, let's work together

Many Canadian family businesses are run by couples, which sometimes means the personal relationship gets neglected

Family-owned businesses make up between 55% and 80% of the Canadian economy, depending on what definition of family-owned is used. Based on those demographics, it is no wonder CAs in public accounting have many clients who are couples working and investing together. Because CAs see such couples on a regular basis for financial reporting needs, they are often the first and most trusted advisers on all family business issues.

To have a successful partnership in life and at work requires more effective communication skills than those in just a marriage partnership. It is no surprise that family issues affect the business and vice versa. Most business families will acknowledge that planning for the business is very important. However, planning for personal development and taking care of a couple's personal relationship also needs planning and attention if the business is to thrive.

Couples who work together have an opportunity to share and grow together more than other couples. But to

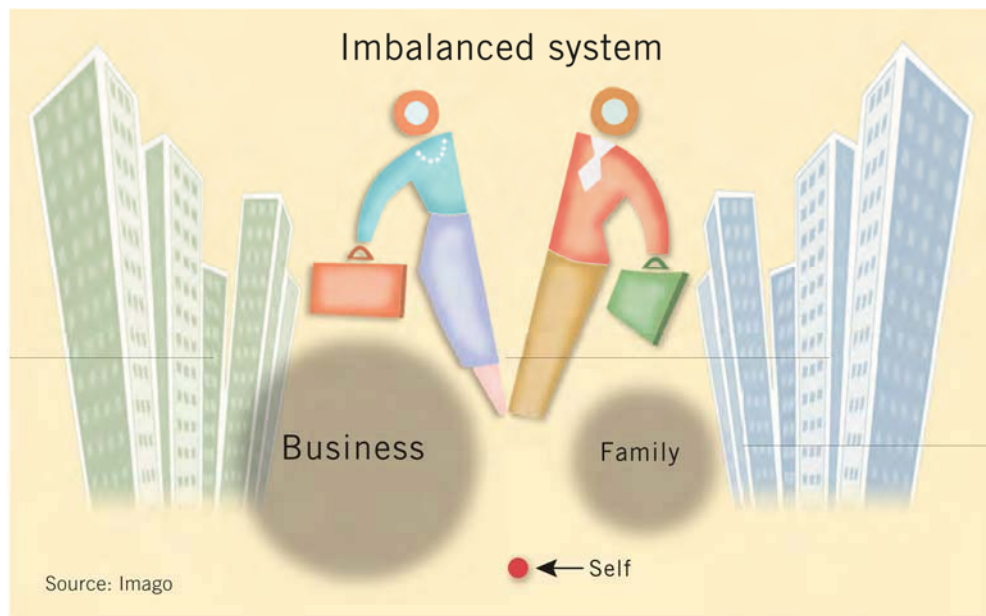
do so, in addition to strong communication skills, they must also develop a strong sense of self.

Often work commitments come before the relationship with such couples. Clarity of roles can be blurred. While family members are equal, at work usually one is more equal than the other. A strong connection can turn into a loss of identity if there is not enough time and energy spent developing the self.

A common problem is putting work first. Many couples spend so much time working on and caring for the business that they forget to grow together and care for themselves and each other. The business is often compared to the youngest child and the one that never stops needing them.

How can small business practitioners help their family-business couple clients? That the spouses trust their adviser is a natural lead-in to help them with estate planning and balancing of their most precious resources — their time and energy.

First suggest the couple set aside some time to discuss planning for themselves and the business. At such a meeting, there are exercises to stimulate discussions. For exam-



ple to get a couple to focus on their personal growth, have each person draw three circles to represent the business, the family and himself or herself. Have them draw the circles to time and energy scale, that is, a size representing how much time and energy they devote to each category. The couple should sit such that they are looking directly at one another and cannot see what the other is doing. With good eye contact people connect on a deeper level.

Ask the couple about time and stress levels at work and at home. They will likely share a lot with one another, gaining insight into their challenges. They may have any number of personal challenges they are juggling, from care giving for parents to learning disabilities with their children. Most people will draw the circles different sizes. Pay attention to the self circle and how large it is. This process should lead to a very rich discussion about work-life balance. In one case, a client had a dot on the page for herself. She was a talented professional, managing a significant business and a family of four children, but she felt out of balance. Seeing her diagram she realized it wasn't family and business she was struggling with. She was out of balance because there was not enough time set aside for herself. So she blocked off certain days as personal time. As a result her productivity at work went up and she lost 30 pounds thanks to her exercise time.

When supporting couples who work together, the challenge is to set up a process so they can come up with a solution to their communication and personal issues. It is this shift from CA as a

business adviser to facilitator of communication that is so critical for such soft issues.

Illustrating how other business couples worked through differences, or even his or her own work on estate planning or "learning to discuss finances and difficult issues" with a spouse or business associates, will help clients see their problems are not insurmountable. Remaining in the facilitator role, ask a few questions:

- are there defined roles in the business? (Best practices for healthy couple relationships suggest the roles be as clear as possible.)
- do they have a time and place where business is not discussed? (Not having a safe place to escape from the business can put a strain on the romantic part of their relationship.)
- is there a process in place to evaluate one's performance in the business and level of job satisfaction? (Lack of feedback and job definition can lead to symbiosis or an unclear sense of self and no clear "me" in the "we" of the couple.)
- are they in the business because they want to be there? (Family business is easy to get into and hard to get out of. It is easier to set clear guidelines and have difficult conversations before there is a crisis over this issue.)
- can they leave the business and pursue other interests at some point? (One day it will be sold either voluntarily or involuntarily. They can choose to be proactive or reactive.)
- what other goals or interests do they have? What would they do if they won a huge amount of money or if the business was sold for

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a large amount? (Such questions can help unlock personal values and lead to a very rich discussion.)

There are no right answers, only answers right for the couple and their family. This means they must listen to one another.

But what is their listening process? Can they tell when they are being asked for advice or just being asked to listen?

Imago dialogue and coaching is a tool used in some practices with clients to take listening to a higher level and improve the level of communication between them. It requires each person to take turns listening, then speaking. When you listen you must pay careful attention so you can repeat what the other person just said. Most of us are busy formulating responses to the other person's dialogue when they are talking rather than really listening. Imago dialogue helps with creating a space, a time and place to listen to each other. It slows down the conversation so that both people feel heard and understood.

Instead of listening, couples often assume they know what the other is saying. Assumptions break down communication because people are connecting with an image of the other person rather than the real person. As such, misunderstandings arise. (For more information and resources please see www.imagocanada.ca and www.imagorelationships.org.)

Couples learn they are very different people, see each other for who they are and appreciate their differences. It is through appreciating differences that they grow.

A healthy business cannot exist where the individuals and the family are not healthy. They are all part of one system and effected by it. As one client couple said, "We just went through the toughest year of our business and worked with a consultant to fix the problems in the business. Now the company is doing great and we are at each other's throats." It makes perfect sense. The focus was on the business, putting the family and the self out of balance. One cannot support a couple who works together without treating the whole system. It is a multidisciplinary process. (See www.successcare.com, www.cafenational.org and www.ffi.org for help in the facilitator role.)

The challenge to a family business adviser is to experiment with soft skills. Try some techniques with your children, with your employees and with your clients. Be prepared to change and grow yourself, you cannot control the pace with which the person you are communicating with will change. It is an incredibly rewarding experience. You will be in for some conflict and conflict is growth. Conflict is positive change starting to happen! You have the opportunity to support your couples who work together in growing all of their circles.

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