

Onboarding new family members must be an intentional process

BY JOLINE GODFREY AND ALEXANDRE MONNIER

If you don't think onboarding new family members is important, you may want to ask Her Majesty Queen Elizabeth II for a second opinion. In January 2020, a year and a half after their wedding, Prince Harry and Meghan Markle, the Duke and Duchess of Sussex, announced they were stepping back from their roles as senior members of the British royal family. The move was unprecedented, put a controversial spotlight on the expenses and income of royal family members, and shook the foundations of the 1,500-year-old monarchy. The event was dubbed "Megxit" (a play on the word "Brexit"), reflecting a widely held assumption that Meghan was the driver of the couple's announcement. The royal family clearly had failed in their integration of the married-in. This failure led to the extraction of Prince Harry from the position and responsibilities for which he had been diligently prepared over 35 years.

Companies spend significant amounts of money onboarding new employees because they want them to be contributing members of the group as soon as possible. Smart managers know that mindfully easing new hires into the company culture will go a long way toward warding off feelings of isolation or alienation that can undermine productivity and shorten employee tenure. On one level, an intentional onboarding process is just a good financial investment. But it's also a wise acknowledgment of how vulnerable newcomers to an organization can feel.

In light of all the knowledge business organizations have amassed about the value of a good onboarding experience, the great puzzle is why it has taken us

so long to steal this information and apply it to the advantage of our families! Like sophisticated companies, families with a track record of achievement and wealth typically have complex systems: policies, rules, expectations, values, unspoken agreements and traditions that newcomers may find arcane, absurd or, at the least, inexplicable.

Every family has its rules, spoken and unspoken. In families where wealth is a factor, those rules may be amplified and enshrined in family constitutions or honored with tacit agreements that have lingered for generations and are openly discussed only after an unwritten "rule" has been flouted. And when those rules are broken — intentionally or not — and a hot button is pushed or disrespect felt, misunderstandings may have unintended consequences for years, if not generations.

What not to do

Years ago, historian Barbara Tuchman wrote a book called *March of Folly*, detailing the ways leaders undermine themselves — even when they have all the information they need to make right decisions. So it is with onboarding. Families often have much of what they need to launch a program, but somehow it just doesn't get done. Here are a few cautions.

- **Don't wait.** It's easy for a busy family to put off creating an onboarding plan until a new family member is in sight. But onboarding policies are more easily accepted when discussed in general and not in relation to a specific person. When the conversation gets personal, the opportunity for hurt feelings and miscommunication grows.

Developing an onboarding plan before it's needed tells every family member, "We need to be intentional about the process of welcoming new family members." This is the moment when surprising attitudes and concerns are best addressed. Who knew Aunt Susan had such strong feelings about what information should and should not be shared with spouses? Who could have guessed that the young men in



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the family think they have “vetting rights”? All kinds of unexpected attitudes may be uncovered — and addressed — before they become obstacles to welcoming a newcomer.

- **Don't miss the opportunity.** An onboarding plan can be a catalyst for inspiring a family-wide approach to orientation, education and engagement. (Just because the rising generation was born into a culture of wealth doesn't mean they understand responsible wealth ownership.) Revisiting expectations, vision and mission can be as illuminating for teenagers as for any recent married-in. Families in the 21st century understand that preparing family members for the future, like preparing world-class athletes or accomplished musicians, is not something done on the side in one's spare time, but is an ongoing aspect of family life.

An intentional onboarding process is an acknowledgment of how vulnerable newcomers can feel.

- **Don't make your onboarding program about “what not to do.”** The goal is welcoming the newcomer, not establishing a “you and us” dynamic. Unfortunately, that outcome is common in families with strong feelings about who's blood and who's not and what that means. Another great learning from the business world is the value of diversity. Families who appreciate the leadership and talent that the new son- or daughter-in-law brings understand that the whole family can be enriched by their presence. Embracing the change, not fighting it, is the goal.

- **Don't forget that your family member is joining a new family, too.** New family members usually arrive with their own family culture and system. It's tempting — but ill-advised — to assume that yours is the dominant or “most important” family, especially when significant trusts or assets are involved. All too often, a message is sent that the party joining the family is the “lesser” party. This can trigger issues of fiscal inequality, class prejudice and resentment, and even crises of confidence. Welcoming a new family member doesn't mean taking in a whole brood, but it does mean staying mindful that this new merger offers opportunities for exchange — not dominance.

What to do

Onboarding signals a proactive, positive family attitude. It tells the whole family — not just the incoming

member — that “We anticipate the future; we plan and look forward to it.” These reminders support that mindset.

- **Do approach onboarding with a 21st-century mindset.** However protective of our families we've become in the context of COVID-19, diversity in families is a strength, not a threat, to family systems. Inclusion and integration are strategic goals, not occasions for suspicion. And new family members may be catalysts for positive change in families — right at a moment when the future looks a bit murky. What talents, new points of view and perspectives do they bring? The fresh eyes of a newcomer, when invited and valued, can offer unexpected gifts. Some have compared new family members to immigrants having to learn to adjust to a new country. The analogy has its merits, but more progressive families try to help the whole family evolve as diverse members enter the system. It's a modern and organic approach to family dynamics rather than a traditional and prescriptive approach.

- **Do be clear about roles and responsibilities.** This is another opportunity for the whole family. Often family members (siblings, cousins) jockey for roles in unspoken, sometimes subtle, sometimes outrageous ways. This may come about because the family is hazy about who's in charge, who has what privileges, what's OK and what's not. Newcomers may be viewed as threats to power or privileges about which they have no understanding. Preventing a chilly welcome is easier when family members are at ease with themselves and their positions in the family.

- **Do create rites of passage and orientations.** Make the newcomer's arrival real and official. One family bestows a “family jacket” on new family members. Another matches them up with a family buddy who can show them the ropes, answer embarrassing questions and explain that weird story Uncle Bob told at dinner. In some families, regular family meetings include a session for married-ins. Whatever the plan is, it should be welcoming and well thought out.

- **Do offer a continuous learning experience.** Families seek engagement from new family members. But they often don't realize you can't expect engagement without understanding, and you can't get understanding without education. The term “education” should be taken in its broad sense here. It's not just financial literacy or wealth management 101. Instead, it encompasses the whole family system, including values, legacy, vision, communication, governance, traditions and family culture. Explain that with education come opportunities — to play a more active role in the family, to participate in some committees, to have a voice in some decisions. And remember that

it's not sending them back to school. There are many different ways to learn, starting with being involved in family meetings and listening actively. Also, keep it simple and pragmatic — it's about applying what they learn. Make it participative and not prescriptive; ask new family members what they would like to know. Most of all, ensure that it is inclusive and fair. Include other family members who could also benefit from the experience. It should be an opportunity for all, not a test for new family members. And finally, don't make it an event but the beginning of a process for the entire family.

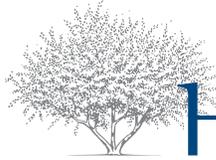
Playing catch-up

It's five years down the line, and one of the spouses (or the adult child who came with the marriage) never got the memo. What if awkwardness remains? Avoidance, or pretending everything is fine when it isn't, is not the answer. Time has a nasty way of entrenching early mistakes, and the longer you wait, the more embedded they become. This is the moment to initiate a tardy onboarding experience. You might say: "When you joined the

family, we didn't have an onboarding process in place, and that was our mistake. We'd like to apologize for any stress you experienced and would like your help paving an easier path for future newcomers. Will you help us create such a program?"

Most great onboarding programs have been started by early-adopter families — it's only recently that more families have begun to see the benefits of these programs. Don't beat yourself up, but be honest with those family members who may not have had such an easy go of it. Address the shortfall honestly, and invite them to be part of a smarter future.

Innovation in business is embraced as an imperative of sustainability, resilience and economic well-being in the organization. Onboarding new family members is an innovation in family life; a practice aimed at fulfilling every family's longing for sustainability, resilience and family cohesion. Innovation, it turns out, is as critical in family life as in business life. The introduction of this one social invention could influence the emergence of a whole new culture of innovation in the family. TB



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