



All in the family

Becoming a trusted adviser to your client's other family members takes time and effort.

By donalee Moulton

In traditionally lawyers build business and relationships one client at a time. Success in the contemporary market, however, may require expanding the focus from a single client to include their entire family. In an aging demographic, lawyers want to ensure spouses and children continue to turn to them for advice and counsel even after their original client has passed on. "Some lawyers focus entirely on the senior client, and that's short sighted," says Susan Van Dyke, a legal marketer in Vancouver. "Some non-billable time spent developing relationships with other key members is critical."

Richard Niedermayer, an estate adviser and corporate lawyer with Stewart McKelvey in Halifax, recommends a two-pronged approach to keeping a family within the firm. "Start by building a trusted adviser relationship with generation one. That is typically the first entrance. Going forward, bring in other generations

for continuity. You want to manage the family on an ongoing basis."

Reaching out to family members will require stepping into the client's world. It's about being visible and making connections over time. That can't be done in your firm's boardroom; you need to venture into the clients' world. "Lawyers are now spending more time at their clients' offices than their own. That is relationship building," says Warren Bongard, president of ZSA Legal Recruitment.

Successful sales people have long understood the value of relationship marketing. Lawyers are more recently coming to appreciate its significance for their profession, notes Cheryl Chappel, president and CEO of Think Marketing in Halifax. "Your name needs to be out there."

She recommends lawyers build relationships with family members in small but substantial ways. Send a birthday card to the children each year, attend the funeral of a family member, refer them to other professionals as a courtesy. Being part of

the family fabric, even on the sidelines, will reaffirm you are part of their network and that you have their best interests at heart. "It comes back to old-fashioned customer service," says Chappel. "You can't sit in your office and assume that will be sufficient."

This may be particularly true if your client owns their business. "The deeper you work in an organization, the more indispensable you will be to the ongoing operations of the company," notes Van Dyke. "The ultimate working relationship with a family business is to guide them through their succession plan. That provides you with unique insight and intelligence about the goals and challenges of the company going forward and how you can assist them in the long run."

Bringing the family into your practice is smart business development, but it is not *pro forma*. Success rests on sincerity. This is about much more than the bottom line for the clients and their counsel. "What people don't like are disingenuous efforts," stresses Niedermayer. "If a client has become a

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friend in some way and you have that relationship, it is entirely appropriate [to reach out], but it is not appropriate to do it just because you feel you should."

Chappel agrees. Indeed, she says, younger generations will demand more of a parent's lawyer than simply trusting in their expertise. "That's not how this new generation operates," she says. "They want knowledge. You need to be a thought leader."

You will also need touch points with younger family members where they most often congregate, and that means using social media. It does not mean transforming yourself into a Twitter expert but it does mean having an up-to-date online presence and ongoing connections. "You need to reach the next generation on their own terms," says Chappel.

Sustaining a relationship with a family is also not a solitary endeavor. Other lawyers in the firm may provide services and create a sense of a united front working for the family as a whole. "I try to build a team approach and make sure we deal with them with a consistent voice," says Niedermayer.

This may be particularly important for retaining younger generations when a parent passes on. "Most relationships are generational," notes Bongard. "Odds are the kids have developed their own relationships. You shouldn't be the only one in the firm that has a relationship with the client."

Despite the soundness of the approach, there may be some resistance to sharing files, particularly in a tough economic legal market. Clients are directly linked to billable hours and other forms of remuneration. Saying goodbye in the short term to build business over the long term may be too harsh a reality for many lawyers. "Larger firms have pushed senior lawyers to pass files down. You can lose part of your practice in this way," says Bongard. "Many lawyers resist the instructions to do this."

Another key factor in the failure to keep a client close is complacency. Many lawyers assume if they have one member of the family as a client, they have them all. They may also assume they will continue to represent the family business after the owner has passed on. Both assumptions are false and they lead to a false sense of confidence and a lack of action, says Chappel. "You assume the business will be yours and you don't invest in them."

There is no easily accessible data (if any)

indicating how successful lawyers are at keeping family members in their practice. Similar statistics for the financial services industry indicate the success ratio is low. According to a whitepaper from Toronto-based *strategymarketing.ca*, "Why women leave their financial advisors: and how to prevent it," 80 per cent of women switch advisers after the death of their husband.

Lawyers will want to start counterbalancing any such trend in their practice now, especially in light of Canada's aging demo-

graphic. Statistics Canada says the number of seniors in the country will exceed 23 per cent by 2030. In 2013, it was 15.3 per cent.

While it is essential that lawyers grow along with their clients to ensure the best possible representation, bringing families into the fold can be helpful for everyone. "The key is to find opportunities to engage other members in the conversation. It's also the best way to avoid disputes," says Niedermayer. "If you have those open discussions, it helps to build a trusted relationship." **CL**

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