



## Tips for Professionals: Helping Your Clients in Life Transition

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"Expert Guidance thru Life's Transitions"

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You may be an attorney, financial planner, physician, accountant, or another professional. If you work with people, you work with people in life transition!

What do life transitions mean for you, and for your practice? With a little understanding of our natural responses to change and loss, you will be a more valuable resource to your clients.

And what may you expect when a client is going through a divorce, major illness, the death of a close family member or a career transition?

Increased disorganization is common, as we reflect outwardly what we may feel internally. Sometimes access to the needed information has changed, or the person responsible for maintaining it has changed.

Unusual forgetfulness as people in distress may not remember what they have told to whom, or what you may have already reviewed with them.

Emotions on the surface, especially sadness, anger and fear during and following an unwanted change. Emotional decision-making tendencies may over-ride logic and fact based decision making.

### Tips for Professionals

- Be Patient! Do not overload the person
- Prioritize: to decrease anxiety
- Be Practical...and realistic

Allow more time for this client than usual, and be ready to listen. Take the time to educate, as good understanding and clarity is needed for solid long-term decision-making.

Provide a printed outline for meetings to guide discussion, and for note-taking.

Emphasize any critical, not-to-miss deadlines, and the “why” (consequences)

Summarize meetings with a short list of bullets, including tasks assigned to client, and those you are handling, with dates due. They may not have the energy to write everything down and are likely to forget if they do not.

Include a third party for your meetings (if appropriate) to help with understanding and follow-through for completion of tasks.

Communicate “more”: more frequently and more thoroughly. Check in with a phone call between meetings to see if they are on target. Support staff can do this; it’s the contact that is important. If not typically done, implement a reminder call for appointments, its temporary!



## For the Practice as a Whole

Acknowledge client life transitions

Let clients know you care with a card, designated charity donation, or small gift

Take “extra” care

Don’t appear rushed, try to be fully present in meetings or calls

Avoid any impression of soliciting business as not to damage trust

Be sure they are informed of all business-related tasks to complete.

Go the “extra” mile:

By offloading tasks, organizing/ researching something, especially if that is a critical step in moving forward, rather than waiting for them to do it.

Be holistic and realistic

Consider the whole, new picture and available support systems in planning. For example, if newly single, will your client be able to learn what is needed, or will they need ongoing outsourced services?

Professionals offering their expertise in a compassionate and pro-active way with clients during a major transition have a unique opportunity to reinforce the value of their relationship, and build loyalty for the long term. People will always remember those who were especially kind or helpful when they were feeling most vulnerable. Even seemingly simple things add up to mean a great deal.

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For information on our provider network, [Springboard Connects](http://www.springboardconnects.com), visit our website, <http://www.launchingnewlives.com>.

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