

Partnership reformation

Coaching for partnerships who need to reform after one or more of their group retires from their firm

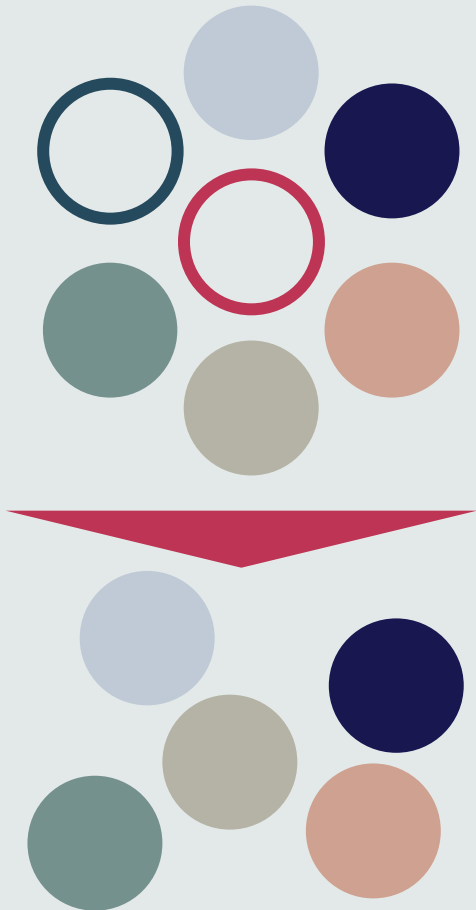
When partners retire, often the remaining group need to shift around roles and responsibilities. The dynamic of the group changes and it can take a long time to settle back down again.

In terms of who does what, this can be obvious. Clients will be handed over as a matter of course and specific internal roles may also be obvious. If they led a practice area, a successor will already have been identified. That much is simple.

What is less tangible is the shift in dynamic within the group. In any group with more than two people, there are subtle ways in which the group operates, for example when deciding on operational matters, or when determining future strategy. Shifts in alliances can be unnecessarily difficult.

While all of this can and will settle over time, the reformation of a partnership behind a departing colleague is a fantastic opportunity to reset intangible roles and redefine working relationships.

Using MBTI and CliftonStrengths, with our long experience of working in partnerships (30 years combined), we can run a team building session that is focused on you harnessing your collected strengths and preferences to strategically close the gap left by your departing colleague. It is often a great opportunity for less seasoned colleagues to step into roles that really suit their strengths, and for others to hand over responsibilities that bring them no joy.



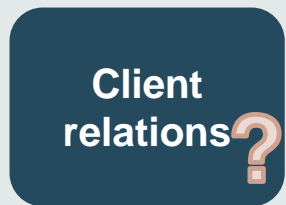
Your professional roles at their core are unchanging, but in supplementary matters relating to the leadership of your organisation, you can make choices based on preferences and talents.

**Strategic direction**

**Thought leadership**

**BD & Marketing**

**People leadership**

**Client relations**

**Operations**

There is a lot of sacrifice built in to becoming a partner in a firm. At their core, partners have a defined and refined set of skills that they have been honing for well over a decade. In some ways, what a partner enjoys is secondary to the demands of the job overall. However, when it comes to shared partnership roles and responsibilities that go beyond the core demands of the profession, there are opportunities for choice. Why would one partner take on the responsibility for communicating updates to the team, when there is another who enjoys this more and has more natural talent in this area? Why would one battle with determining the future direction, if another is more naturally strategic?

This isn't a matter of making your lives easier, per se; in our experience, partners do not have a mindset that's geared up to having an easy life! However, when it comes to organisational leadership, having the right person doing the right job saves time and reduces the burden of leadership, allowing partners to focus on serving their clients and leading their teams. It also helps with retention to have the right partners in the right roles; the biggest spend in any professional services firm is on their people, so getting the connection right between partners and staff can save a fortune through enhanced retention.

MBTI and CliftonStrengths are very different tools, so when used in conjunction they illuminate how each person is suited to the many additional roles fulfilled by groups of partners.

Running a firm and taking care of the team are supplementary roles assumed by groups of partners. After all, the chief raison d'être is to serve clients.

It therefore makes a lot of sense for these supplementary roles to be assumed by the individual partners who are best suited to performing them well. This can be calculated through trial and error, but it is more effective (and less of a strain) for these roles to be apportioned to the correct individuals from the outset of partnership (re)formation.



This tool tells us whether we:

- Prefer spending time with groups or prefer to speak to people one-on-one.
- Prefer to focus on the here and now, or on the future.
- Take decisions based on logic or feelings.
- Like to do things ad hoc, or prefer to plan.

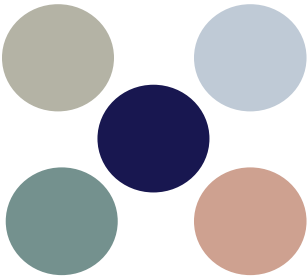


This tool tells us our natural strengths in the following areas:

- Strategic thinking**
- Influencing others**
- Relationship building**
- Getting work done**

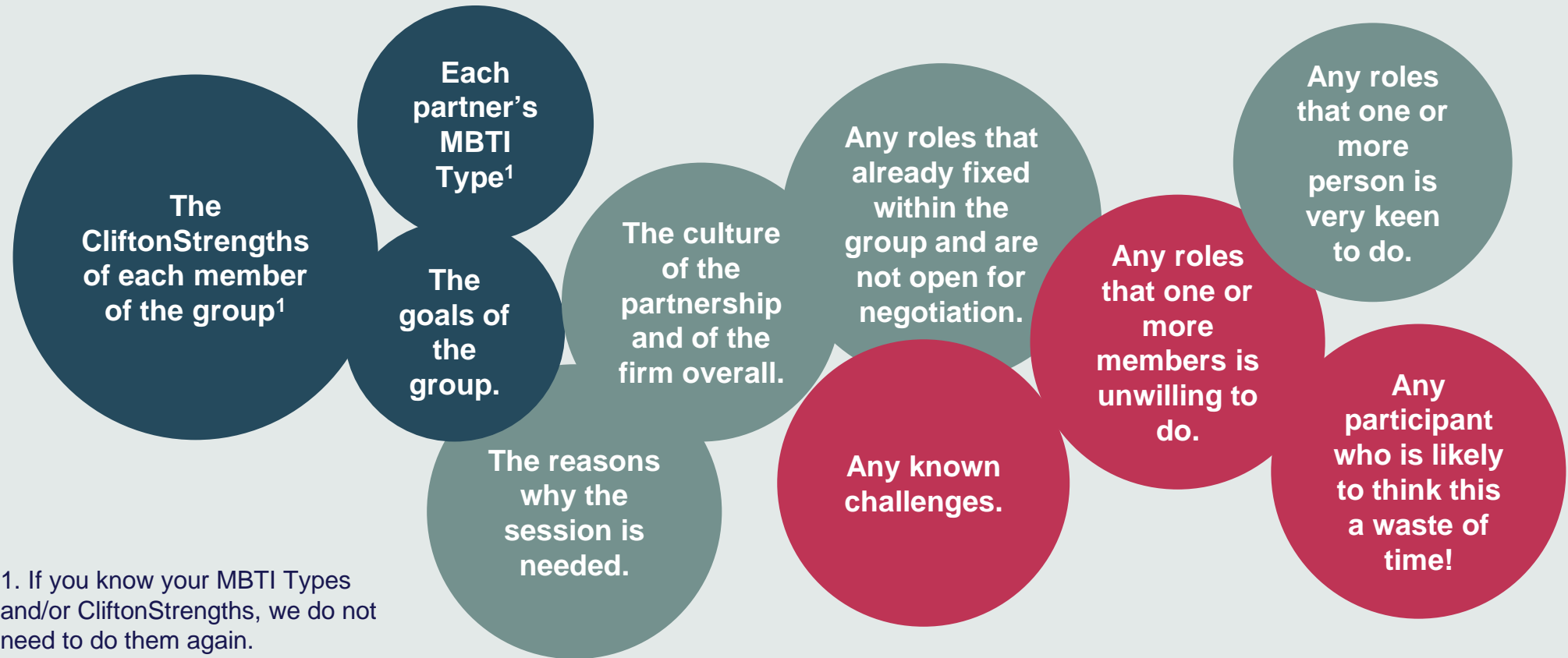


A group of partners that functions smoothly.



While we have an established methodology for this programme, we work hard to ensure that each session is carefully tailored to the group and to their goals.

We will work with you to understand as much as we can about your group, to ensure that everyone involved is bought into the exercise and will derive genuine benefit from the time they invest. We tailor every team building session to ensure maximum impact.



1. If you know your MBTI Types and/or CliftonStrengths, we do not need to do them again.