Partner-Pipeline® Concept Summary

While working with and in accounting firms, we have made two observations.

1. People go into public accounting expecting to be high-contributing professionals who experience career fulfillment.
2. Firms concentrate on developing people technically but haven't adequately prepared them in the professional skills they need to succeed.

The result is that firms have an inadequate supply in their partnership pipeline—CPAs who are capable of and desire to assume firm leadership and ownership. And there is no program that takes professionals from entry level through senior manager in an organized way that equips them with the professional skills they need to be firm leaders. That's why The Partner-Pipeline® courses are so needed for CPA firms today.

Most of the time, The Partner-Pipeline® courses are presented over a period of months through a combination of instruction and coaching, both onsite and virtual. Each course's outcomes are more than "training." In addition to information received and skills obtained, participants are expected to apply what they learn to their work setting.

Each course is customized to a firm's particular needs, cycles, cultural norms and messages. The goal is to empower participants to apply what they learn to what they do, using instruction, coaching and accountability to reinforce their development.

Here is a sampling of courses that many firms have instituted.

Activate Your Professional Career (Associate level)

One of the most challenging aspects of being a new staff member is learning how to shift from being a college student to being a professional. New workers will need to develop skills related to professional behavior and work practices, different from what they learned as students. These courses prepare them to make significant contributions to the firm by learning how to manage the pressures in this profession, how to earn the confidence of others, and calibrate their bar of excellence.

Align Aspirations with Career Ownership (Seniors)

Careers take shape when individuals connect their internal motivations and strengths to the work they do. These courses help your staff identify and align their unique abilities and strengths to the clients they serve, the staff they work with, and the work they are responsible for. Their contributions matter. When they see how their work connects to the firm's mission, vision, values and strategic plan, they are more likely to take ownership for their career and see how it aligns in your firm.

Domains of Effective Management (Managers)

Managers encounter a whole new level of responsibilities than their previous positions. They are leading up, down and across the firm. As they become more technically knowledgeable and experienced, they are expected to manage people. Learning to be effective in the four domains of management can be the difference between finding career fulfillment and becoming burned out.

Behavior-Changing Feedback (Managers)
A key responsibility of managers is providing helpful feedback to their staff. Too many managers shy away from this because they feel uncomfortable and ill-equipped to do so. They find themselves fixing errors in order to move projects along and avoiding the difficult conversations with others, all because they haven't learned the skills to give productive feedback. This solution provides managers with the skills and tools necessary to give effective feedback that changes staff behavior.

Conduct Challenging Client and Staff Interactions (Sr. Managers)
Our profession is built on relationships and while many of them are nurtured and strong, not every interaction is a positive one. These courses give your managers the tools to navigate challenging conversations and turn them into opportunities to build lasting, loyal relationships.

Become Partner-Ready (Sr. Managers)
The big question that comes up for senior managers is, what does it take to be partner? This is often a difficult question for firm leaders to answer because there are It can be a challenging and daunting question. Our courses are designed to help them discover what it takes, and see how their unique contributions can launch them into this next role. Our focus is not to prepare them to be a partner in just any firm. Our program is tailored to making your senior managers partner-ready for your firm.

One of the challenges that public accounting firms face is identifying and grooming managers and new partners to assume the partner role. Firms who take leadership and succession seriously know they need a plan of continuity and a program to raise up the next generation of leaders. Without this emphasis, potential leaders will leave for other opportunities or worse, remain and be mediocre in leading your firm.

While there are numerous and very good programs available to develop partner candidates in general, their graduates are seldom prepared to assume partnership in your firm. Firms are different and what is "partner-ready" for one firm may not be acceptable in another firm. This program is unique in that the goal isn't to complete a course, but to develop partner-ready candidates for YOUR firm. Each candidate has specific strengths, deficits and needs, which can only be developed in a customized approach tailored to the individual.

The PartnersCoach approach begins with the individual. Candidates will complete a battery of assessments to determine their personal style and characteristic tendencies. In addition, certain firm partners will provide their input on the candidates to identify their areas of strength and deficit. Finally, each candidate submits their perspective about their aspirations, personal strengths and what they believe to be their developmental areas.