

Strategic Training Programs

Succession Planning

When firms engage in long-term strategic planning, they are often faced with a huge obstacle: succession planning. Do you have the bench strength you need to be successful? Have you invested the time in training, coaching and mentoring your next generation of leaders? For many firms the answer is “no” and it’s no wonder as most firms focus on the day-to-day priorities of firm operations, delivering amazing client service and taking care of employees. But, that doesn’t mean you can’t start now.

This session will cover the following:

1. Current State

We’ll start by evaluating your current state of succession to identify the strengths and weaknesses of your leadership team. Do you currently have a wave of partners who will be retiring within the next 5 to 10 years? Are they creating their successors so the firm will continue to be successful after their retirement? How about those under-performing partners...are you accepting their limitations or helping them to become better? How effective are your managers? Have you promoted them due to technical expertise or are they the complete package of technical, leadership and entrepreneurial strengths? Do your verticals all have succession plans in place? Having one person who knows everything about an industry or service is risky for firms, particularly since specialization is the key to steady growth.

2. Future State

We’ll transform the gaps identified in phase 1 into a strategic action plan of the future.

3. Inspired Leadership is the Apex of Performance

This exclusive training program tackles the 3 levels of performance so your leadership team gains an understanding of where they are at now and where they need to be in the future so the firm can be successful. Most organizations move forward on momentum, not because of leadership drive. They tend to be in the present or look back to the past rather than looking to the possibilities of the future. It is critical for partners and managers to see their jobs as creating something that does not exist now and spend time taking action to create the future. This training program will equip your leadership team with the tools they need to understand that leadership is about action, not position.

How will this program make your firm better?

You will have a clearly defined succession plan and highly effective leadership team so you are poised for future success.



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