

FROST INSIGHTS

Leadership in Professional Service Firms:

Making a Successful Pitch

'People never lie so much as after a hunt, during a war or before an election'

- OTTO VON BISMARCK, Chancellor of Germany

What's in this Insight

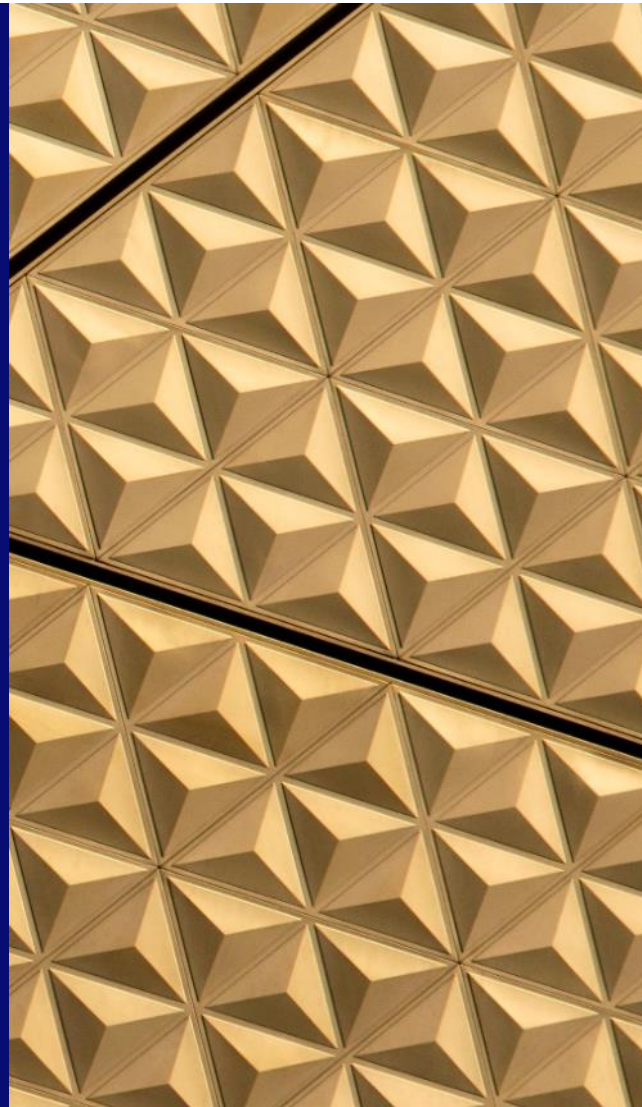
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This document is designed to help people when they are seeking a leadership role of some type in a professional service firm (PSF or firm).

PSFs include but are not limited to law, accountancy, architectural, engineering, management consulting, project management and valuation firms. Such firms may be organised as partnerships (with, you guessed it, partners), companies (with shareholders, directors and Board members: who may be different people) or possibly in other ways. For convenience, in this document, ‘principals’ refers to the members of a PSF, and possibly others, who are *voting on your candidacy* for the role in question.

Depending on the role and your firm’s rules, the voting principals may be all the principals in the firm, or just members of a Board (if one exists) or a business unit. Knowing exactly which principals are officially voting (and those who may be influencing the outcome without casting a vote) on your role is important. Are there external consultants also involved in official or unofficial capacities?

Try to be an exception to the norm expounded by Otto von Bismarck: don’t lie to your fellow principals during (or after) your election campaign.



1. Introduction

This document is mainly directed at situations where you have either put your hand up, or you are thinking about putting your hand up, for a leadership role in your firm, where the position will be adjudicated in some fashion. That is, there will be a vote, or some other selection process (which may or may not involve a drinking contest or examining goat entrails) to decide between you and other aspiring candidates.

Having said that, much of this document will also be relevant where you have either been given or offered the role (perhaps, but ideally not a poisoned chalice) on an uncontested basis. At least ask yourself: why isn’t this role being contested? Why am I the ‘lucky’ one?

Hopefully, this document will have relevance to any type of PSF leadership role, whether you will be leading a modest site team in a regional office of a small firm, or you are seeking to become the managing principal of a global behemoth. The core elements of the art and science of making a successful pitch are similar in any situation.

This Insight contains comments, suggestions, reflections, tips, tricks and lots of questions for you to ask yourself. Every PSF is different in its own wonderful and usually weird ways, and every leadership role will have its own unique issues and opportunities.

This document is based on an amalgam of personal ‘in the trenches’ experiences garnered during my first, 34-year, PSF-based career including various leadership roles, my reading/research/education, and on a variety of coaching and mentoring assignments with aspiring PSF leaders in my second career.

Let’s cut to the chase. A large part of your success or otherwise will hinge on the **quality of your relationships** with the voting principals. Do they like, trust and respect *you*? Do you think, that they think, that you like, trust and respect *them*? What can you do, before votes are cast, to strength relationships, where necessary, with key voting principals? How do you assess the strength of relationships between other candidates and the voting principals?

2. Right role, right time?

Even if you have been asked/urged to throw your hat into the ring by senior principals in your firm, you should ask yourself these types of questions:

- Why, exactly, is this a good role *for me*, at this time of my career?
- Am I making my run ‘too early’ or ‘too late’?

- Do I really expect to win this time, or am I just trying to make a credible run, to help set up my chances for the next time this role or a similar role becomes vacant?
- If I am successful, how will this benefit *the firm*?
- What are my personal values, motivating drivers and sense of purpose? Do they align with those of my firm?
- How will taking on this role impact on my values, drivers and purpose?
- Have I/should I discuss the proposed role with my spouse/life partner, children, other family, mentors, confidants etc, to get their views, perspectives, tips etc?
- Being realistic and clear-eyed: what will taking on this role likely mean for my work-life balance and what expectations/boundaries do I need to set up: *in advance*?
- How will I look after myself, including my physical and mental health, during and after the campaign?
- Do I need to ask my spouse/life partner, and/or other people, to help hold me accountable: to still go to the gym, play golf, go running or walking, or whatever else I usually do to help maintain a healthy lifestyle?

Hopefully your answer to the first question above is *not* one or more of these:

- (Only) to make more money.
- To punish one/more of my enemies in the firm, starting with other candidates for this role.
- To make radical changes, without mentioning them in my candidacy run and/or without consultation in due course.

3. What motivates your fellow principals and why should they vote for you?

You are entering a politicised horse race. It is worth reflecting on what drives your fellow principals and why they might vote for you, rather than other candidates. You will want to have a 'platform' of some type – see later. But how will your platform motivate the voting punters?

Here are what I call the 'magnificent seven factors of motivation'¹:

1. **Autonomy:** is a sense of initiative and ownership of your actions and the experience of acting with a sense of choice, volition and self-determination. In short: being able to do your own thing without direction from others. This is especially important to most principals in most PSFs.
2. **Mastery:** is the feeling of achievement, a sense that one can succeed and grow. The need for mastery is best satisfied within well-structured environments that afford optimal challenges, positive feedback, and opportunities for growth. Not all PSFs pass this test.
3. **Relatedness/relationships:** is a sense of belonging and connection and the experience of having satisfying and supportive work and social relationships. Some PSFs good, some bad.
4. **Status:** is about our relative importance to other people. What is our level of seniority and where are we in the 'pecking order'? This is *very* important to principals in PSFs.
5. **Certainty:** concerns our ability to predict the future. Our brains crave certainty and are pattern-recognition machines that are always trying to make predictions. For principals in PSFs, this includes never ending predictions of their future income, which often involve guesstimates of how many units/shares they will be allocated and the unit/share value.
6. **Fairness:** is about our perception of fair exchanges between people. At the extreme, (OK, probably not in most PSFs) people are prepared to die to right perceived injustices.

¹ These factors are based upon an amalgam of overlapping elements of Self-Determination Theory (Edward Deci and Richard Ryan) and David Rock's SCARF model of motivation, to which I have added feedback.

7. Feedback: is implicit in some of the preceding six factors, but in practice it is so important it is worthy of a specific mention. Feedback comes in all shapes and sizes. When done well, including via well-timed specific praise, or carefully crafted constructive encouragement, feedback can be a huge motivator. On the other hand, the absence of feedback, or feedback that is poorly delivered, can be highly demotivating for the recipient. Principals (and staff) in PSFs vary enormously in their abilities to both *provide* and *receive* feedback in a productive and effective manner.

People are motivated by all sorts of things in addition to the magnificent seven needs noted above. Things like: love, kindness and charity. And money, greed, power, revenge and lust. We will conveniently ignore such motivators, but they obviously exist and shouldn't be totally ignored in the workplace. Especially money. In both of my careers, particularly in the professional services and financial services sectors, I have come across many people who are highly motivated by, and focused on, how much money they are earning. Oftentimes, this is in fact a status and fairness thing. They want to be paid at least as much as their colleagues who they think (rightly or wrongly) are their peers.

Ask yourself these questions:

- What motivates the voting principals? If there is only a handful, try and work it out one-by-one. If a large group, reflect on the likely importance of the seven factors above in aggregate.
- How will my candidacy and my platform either *threaten or enhance* the magnificent seven factors of motivation in the eyes of the voting principals?
- How can I tweak my platform to be less threatening and more enticing, having regard to these factors?

- As far as I can tell, how are my competitors for this role, and their platforms, likely to be perceived by voting principals, viewed from the magnificent seven factors of motivation?
- If I am elected, what will be my *change management strategy*, to actually get my platform implemented, especially if this conflicts with likely motivational factors of principals?

4. What *exactly* will be your role(s)?

Some questions for consideration:

- What exactly are you potentially signing up for?
- Is there, or should there be a clear, written job description with expectations, goals, deliverables, plans, accountability/review mechanisms, etc? If not, why not?
- How will you be reviewed, rewarded and remunerated in this role? By who, and how often?
- Are you expected to somehow just do this job magically/ 'in your own time', and still maintain a full client load and/or other roles you have? Why would you want to do this?
- If you will need to wear multiple hats (e.g. a firm leadership role as well as retaining ongoing client facing responsibilities), how can you negotiate some sensible/realistic expectations of your various commitments/ 'deliverables', *before* (NOT after!) the vote?

5. What is your platform?

Whether or not you need to make a formal written and/or verbal pitch (see below), you will want to have a ‘platform’ of some sort, which you can communicate to voting principals. That is: policies, proposals, initiatives and ideas that you will seek to put into practice, if elected; even if only to say that you will just continue what the last guy/girl was doing.

So:

- What *exactly* is your platform?
- Why will each element of your platform resonate with voting principals, at this time in the firm’s life cycle and given current business conditions?
- Have you, or will you, consult with voting and non-voting principals, to road-test your ideas? Do you know what they care about; what is on their minds?
- To what extent are ideas in your platform a ‘given’, as compared to promising to consult on ideas/details after you have been appointed?
- Have you *written down* your platform somewhere?

Here, in no particular order, is a shopping list of just some things that may or may not be part of your platform, depending on your firm, the role you are seeking and most importantly the ‘firm politics’ and what you are allowed or not allowed, or expected, to say out loud:

- **Your leadership style:** what sort of a leader will you be? Will you ...
 - be consultative, caring, compassionate, collaborative, communicative, curious – amongst a myriad of other ‘c’ words? (I have a list of more than 20 such ‘c’ words for aspiring leaders. Sigh.)
 - display (genuine) humility and be respectful?

- say what leadership means to you?
 - put forward a (short) definition of leadership?
 - propose a (simple) leadership model or framework which you intend to follow?
 - tell people which leaders in the firm, or elsewhere, have inspired and/or motivated you thus far in your career?
 - solicit feedback on your performance if elected and if so, how often, how and from whom?
- **Firm Purpose/Vision/Mission/Values etc statements:** does your firm have one/more existing statements of this type? Not sure? *Well, find out!* And memorise them. Do you personally agree with any existing such statements? Do you wish to initiate or change one/more such documents? If you ask some senior, soon-to-retire principals what the “purpose” of your firm is, you may get a response something like this: *“What a stupid question! Isn’t it obvious? To make as much money for the principals as quickly as possible.”* Maybe you agree with such a view. If so, be careful to whom you say this out loud. Many of your staff members will be hoping for something loftier and more inspiring, than sweating to make the firm’s principals wealthy people who can afford to buy multiple rental properties at their expense, while they struggle to save a home deposit or pay off a mortgage.
 - **Your role:** if you are expected to still maintain a client load and/or other existing roles, will you spell out your time commitment to this new and additional role you are seeking?
 - **Firm financials:** will you put forward growth plans and projections of increased total and average profit per principal, increased revenue, cost control: especially of the much-maligned ‘back office’? If you are providing forecasts, where did the numbers come from? Are they wishful thinking? Did you just make stuff up? Should you detail your variables, assumptions and parameters?

- **Services/products/specialisations:** review/refresh/broaden/enhance/reduce? Why, how and when?
- **Clients:** more/better/different clients? Why, how and when?
- **Principals:** more (or fewer!) principals? Lateral hires? Why, how and when?
- **Principal performance management and/or remuneration systems:** even hinting at touching these things in a PSF is usually about the most explosive thing you can do, apart from promising to sack underperforming principals. It will be impossible to keep all principals happy. The gratitude from those made better off, will be drowned out by the noise from the disaffected. You will need, and will use up, plenty of political capital in this exercise. Not for the faint-hearted. Usually best left until a second term in office if possible.
- **Accountability:** also likely to be a very touchy subject, unless you are just discussing how your fellow principals can hold *you* accountable in your new role!
- **Firm structure, business model, governance structure, leadership and management roles:** this is usually the next most nuclear set of topics, after bulleting underperforming principals, fiddling with performance management and/or rem systems, and addressing accountability.
- **Staff:** more or fewer staff and/or their productivity, morale, remuneration/bonus arrangements etc? Are we a great place to work? Our reputation? Why, how and when?
- **Firm/division/team strategy:** principals in PSFs (especially men) generally love to hear talk about 'firm strategy': as long as it will lead to more profit, and ideally without them having to work harder or actually do things differently themselves. Be very clear if you are proposing to change the firm's existing strategy (assuming there is one!), or if you are proposing something new. Make sure you use the words 'strategy' and 'strategic' at least a couple of times in your presentation. Most principals (especially men) like hearing these words said out

loud. Of course, make sure that whatever you say is actually strategic, and not just blathering bullshit bingo.

- **Firm culture, morale and harmony:** ditto.
- **Learning and people development initiatives:** ditto.
- **Collaboration, teamwork, cross-lines of business, silo-avoidance:** ditto; as well as emphasising the importance of ensuring *psychological safety* within the firm/teams.
- **Equity, diversity and inclusion:** depending upon your firm, there are all manner of potential issues here, and not just the usual/obvious ones related to gender.
- **Technology:** how, exactly, are you going to prevent the firm being made redundant in the very near term by competitors who are more digitally savvy and across the latest developments in automation and artificial intelligence? Forget IT-stone age ChatGPT4. How will you deal with exponentially superior ChatGPT8.0 in a few years' time?
- **Firm name, branding, reputation, market share, marketing and internet presence:** go for it, but some of these may be divisive topics, with most principals likely to have strong views, often based on very little actual knowledge, evidence and expertise.
- **Premises and offices:** not usually great campaign topics unless really necessary.
- **Working from home vs in the office:** cover this if/as required.
- **Sins of the past:** do *you* have any skeletons in *your* professional and/or private closet that should be aired now, along with any grovelling apologies or explanations? Did you inexplicably turn up attired in a Nazi uniform, to *your* fancy dress 21st birthday party, with a pencil moustache, even if you now assert that you were not, in fact, impersonating Adolf Hitler?

- **Firm rules, processes, risk management, decision-making protocols etc, etc:** earnestly promising a review and refresh of such things is (sadly) not generally a major vote winner in most PSFs, but maybe the time is right in your firm.
- **Finally ... advanced/cerebral issues:** do you have a passion for, and expertise in, things like, say: design thinking, advanced decision-making models, systems thinking and theories, complexity and/or chaos thinking/theories/systems, VUCA world, adult development theory, advanced rhetoric, etc? If so, great. Maybe you are irritated that I have labelled such things as 'advanced/cerebral'. Do the voting principals in your firm understand AND care about your particular passion(s), if they are not currently part of the firm's strategy? If so, great. If not, is it wise to include it/them in your platform?

Principals in PSFs typically will have varying degrees of appetite and interest for some of these topics. For example, most PSF principals like the idea of increased average profit per principal. But how, exactly, do you propose that this will be achieved? Put yourself in the shoes of your fellow voting principals. They will be thinking, and saying these sorts of things, to themselves and may be out loud to their close confidants:

Increased profit is great, as long as I don't have to work any harder myself, or do anything differently. But of course, there is plenty of scope for improvement in firm business units A,B and C, and especially principals X,Y and Z.

Yeh, yeh, yeh, heard it all before. Been there, done that. All candidates always promise this, but no one ever actually delivers.

The easiest and quickest way to increase average profit per principal is to get rid of the most underperforming principals and reallocate their clients. Wait, hang on, I might be in that group ...

Some other issues for contemplation:

- Don't take on too many things/initiatives as part of your platform. Don't promise more than 'you' can deliver. The reason for the inverted commas is that achievement of your plans will require **lots** of consultation and buy-in from your fellow principals, and probably staff and other stakeholders. You won't be able to do very much without such input. Such processes can take a surprising amount of time (and patience).
- In a similar vein: in your pitch presentation, discussions and written materials, be careful about deadlines and saying things "will" be done by certain dates. Do you really need to put dates on deliverables? Depending on the circumstances and the issues on your agenda, perhaps you need to specify one or more deadlines. Just be careful not to over commit yourself and others.
- In short, being the managing principal of a PSF, or having a senior leadership position, is a *very different role* to being a CEO of a public company. In a PSF, you will have to negotiate on a regular basis in a careful way with your fellow principals without the overt power that is typically wielded by a public company CEO.
- Should you have a short/catchy 'campaign slogan', as politicians/political parties usually do? PSF leadership contests seem generally to be slogan-free affairs. However, workshop the idea with some close confidants. Maybe a carefully crafted slogan will be of assistance to your particular platform and campaign.

I regularly review/workshop/brainstorm proposed platforms with my clients.

6. How will you campaign: what is your strategy?

Did you like the use of the word 'strategy' just now?

If you want to win the race, you need to campaign, and you will need a strategy. Even if your firm says, ‘no campaigning, no politics’, you do need to campaign and engage in politics in some fashion. You should assume that other candidates for the role will be campaigning, even if via covert means.

It is important to find out if there are any written or unwritten rules about how to go about publicising your platform and soliciting votes in your firm, *and follow those rules*. In March 2024, PwC stripped three senior partners of their management roles and disqualified one of them from the race to run its US business after finding they committed “significant violations” of electioneering rules and firm policies.²

In descending order of value, here are some of the things you could do:

- Meet one-on-one, face-to-face, with each voting principal at least once, and maybe more often for some/all of them. Start with some small-talk and relationship building chit-chat. Get them talking. Ask what matters most to them (in their current role; the firm; the contest you are engaged in) before engaging in a (hopefully not longwinded) pitch about yourself and your ideas. Ask them if you can count on their vote. Keep a Yes, No, Maybe and Not Telling You list of voting principals.
- Have videoconferences one-on-one with each voting principal if you can’t meet face-to-face.
- Have meetings with groups or teams of principals, either F2F or online.
- Formal presentations/Q&A sessions.
- Send out written material via email or in hard copy.
- Get some of your buddies to do some of the above things on your behalf. Having some supportive and engaged colleagues is usually vital. Use them well, but

² *PwC partners cut from top roles over breaches*, article in the *Australian Financial Review* on 7 March 2024, originally published in the *Financial Times*.

remember that *you* are going to have to do most of the heavy lifting. It is *your* campaign, not theirs.

- Probably no corflutes, how-to-vote cards, bunting or badges. Unless you work in an American PSF.

Depending upon your firm's rules, geography/spread of offices, and the number of voting principals, the first preference above may or may not be possible: but it is definitely THE best method. Promise. If you are going to be having numerous one-on-one meetings, diary management and logistics will be critical and may be potentially overwhelming. You will want to have an efficient and competent personal assistant to help you.

Be careful about over-promising things/roles/shiny baubles when you meet with your fellow principals. Keep a written record of any commitments you make, and ensure you either action them in due course, or go back to the relevant principal(s) and explain why you are not following through on any given promise.

You need to keep track of, and potentially respond to your competitors' campaign strategies. As regards competitors, and unlike in actual politics, my general suggestions in PSFs are to:

- Be unfailing courteous.
- Explain if/as required, courteously, why you do, or do not, support ideas being promoted by your competitors.

Will the contest you are entering be a secret ballot of some sort, or be a transparent 'show of hands' type process? This may have some bearing on your campaign strategy and platform.

As appropriate, don't limit your campaign to voting principals. If you will be taking on a leadership role of some significance, with direct reports in the firm's back office

or support roles, what do they think of you and your platform? Can you speak to people like the Chief Financial Officer, Chief Operating Officer, Head of HR/People and Culture, Head of Learning and Development, and the Chief IT type person? Maybe they have some great ideas which will help inform your platform and make it more realistic.

After all, you will want to have good relationships with such people, if you are successful in your pitch. Unless, of course, a key part of your platform is to sack all or some of them.

So, what is *your* campaign strategy?

7. Do you need to make one/more formal presentations?

Depending upon the firm/role, you may be required or offered the chance to make one/more formal pitch presentations to voting principals. If there is a choice whether or not to make a presentation, it is generally a good idea to make one, especially if other candidates are doing so, and so that you can answer any questions in an open forum.

Here are some general tips and observations about such presentations:

- Find out the time limit/expectation for the presentation and stick to it *rigorously*, allowing enough time for Q&A if/as expected.
- Don't speak too quickly. Aim for about 140 words a time, maximum. So, if you have, say, a 20-minute slot, then you have time for about 2,800 words. That's it, no more. Time yourself in your (recorded) practice sessions.
- Figure out the most important parts of your platform/pitch and concentrate on those. You may not be able to cover everything in the presentation. Maybe some stuff needs to be emailed, or just deleted.

- Write out your speech, *word-for-word*, and don't just wing it on the day. Of course, don't actually read it out from your real or virtual podium. That will bore people senseless. Memorise it as best you can, referring sparingly to your notes if/as needed. Don't follow your notes slavishly: extemporise, pick up on the vibe and mood of your physical or digital audience.
- Avoid death by PowerPoint. If slides are required, expected, or seem like a good idea at the time, don't have more than one slide a minute, at most. Preferably fewer. Make sure that the slides are not too 'busy' and that they will be able to be clearly read at the back of the room, or on a screen as required.
- With slides: use colour, graphics, tables, charts, diagrams etc as much as possible, rather than slide after slide of wordy dot points. Get a 'presentation professional' to help you with your slides.
- The opening minute and the closing minute of your presentation are important. They need to be uplifting, powerful and thoughtful.
- Remember the 'power of three', beloved by orators and consultants alike since the time of Aristotle at least: three key reasons; three insights, three goals, three key initiatives, etc, etc. Not two, or five or eight! Think: *Veni, Vidi, Vici* (I came, I saw, I conquered) – Julius Caesar; and "*Friends, Romans, Countrymen* lend me your ears" – William Shakespeare. Get the picture? (Okay, okay, not everything has to come in threes, but three should be a starting point.)
- Also: remember the power of (brief/to the point) *stories and anecdotes*. These work, even with the most hard-bitten of PSF principals; not that they will admit it.
- If you are going to use slides, make sure that the IT actually works. Practice the set-up, arrive early, etc.
- Remember to smile and make good eye contact with your audience.
- If/as appropriate, try and inject some humour and be a little (genuinely) self-deprecating. Definitely try for humility rather than arrogance.

- Prepare diligently for any Q&A session. Think about likely questions in advance, and your responses. Write them down.
- *Practice, practice, practice*: ideally in front of one/more humans: maybe some close confidants/colleagues, your long-suffering spouse/life partner, and/or me.
- Ideally, record one/more of your practice sessions on your smart phone, then replay and reflect on your performance. How can you improve? Remember: you *are* giving a performance.

8. Will you be subjected to one/more interviews?

Will you be interviewed by one/more voting principals, and/or external consultants, as part of the selection process? If so, then the suggestions above on presentations also generally apply. Of course, preparing for questions you may be asked takes on added importance. I have a standard list of likely such questions, which I can share with my clients. Also: have your own list of questions to ask the interviewer(s).

Depending upon the questions you are asked/likely to be asked, and the time scheduled for the interview, you will need to be conscious of limiting the length of your answers to each question.

If you don't already know the interviewer(s), then the comments below on charisma and executive presence take on extra importance. You only get one chance to make a great first impression on someone.

People will (unconsciously) form initial views about you, within a second or two of meeting you and before you open your mouth, based on a myriad of factors including: your perceived gender and age, eye contact and colour, your smile or lack thereof, type of handshake or other greeting, your posture and stance, perceived ethnicity, height, weight/perceived fitness, dress sense, shoe care and facial hair (regardless of gender). They will then (unconsciously) reassess those views, as soon

as you open your mouth and say a few words. So, you typically have about 30 seconds, at most, often less, to impress them. After that, it will be much harder for them to consciously change their views about you. No pressure.

Again, practice is really, really important. I typically help my clients by doing one/more interview role plays, which we record on the client's smart phone and then review, discuss, debrief and repeat.

9. How is your charisma and executive presence?

The good news: you are not auditioning for a Hollywood blockbuster, nor running for the US presidency. So, typically, you will not need to be the world's most charismatic individual to win a contested role in most PSFs. However, your fellow principals will generally expect you to have a reasonable degree of executive presence, especially if you will be representing the firm with a range of clients other than your own, staff and with various external stakeholders.

As required, I coach my clients in these areas, aided by some cutting-edge tools, materials and practices:

- Charisma
- Executive presence
- Principles of persuasion and influence.

10. How is your momentum building?

Ideally, you will seek to *build momentum* in your campaign, so that support for your candidacy peaks at the time of the vote. This is what politicians and political parties try to do before elections, and what athletes and other sports people generally do with great care and precision in advance of major competitions.

How will you build momentum? Well, it will all depend on the circumstances. At the very least, brainstorm the idea of momentum and key aspects of your campaign with your closest supporters and confidants. They will invariably have good ideas and they will be pleased that you sought their input.

11. What will you do, when you win?

OK, you have just landed the role. *Congratulations!* What do you do now? Ideally, you will have been thinking about these things in advance of your coronation:

- What will you say (verbally or in emails/writing) to the voting principals, not all of whom will have necessarily voted for you? And how quickly?
- What will you say, and/or 'do' to the other candidates whom you have just defeated?
- What communications are needed, when and by whom to: staff, your clients, firm clients, the market, other external stakeholders? Who will draft these communiquees and who needs to review/approve them? When will external websites and internal intranets be updated and by who exactly?
- How will you prioritise the implementation of your platform?
- How will you keep track of, and address all of the commitments and promises you made during your campaign?
- Do you have a 'first 100 days plan'?
- Who will you turn to, within or outside the firm, to help coach and mentor you: especially on leadership and any skills/capabilities that may be new/expected?
- Do you need a holiday or time off?

Most importantly, how will you actually lead and effect change in your organisation? After all, you have presumably been elected on a platform that requires some new stuff to be done in your firm. Humans, and especially comfortable and financially well-off principals in PSFs, can be highly 'change resistant' for all manner of reasons. What will be your change management strategy? Hint: carrots work better than sticks.

I can assist you with brainstorming and the design of your change management and communication strategies, and I can also facilitate meetings of principals to discuss and work through change initiatives.

It is beyond the scope of this document to discuss leadership skills in any detail. I have a comprehensive approach to help coach, mentor and develop my clients as leaders, including my '*Four Rs of Leadership*' model.

12. What will you do, if you happen to lose?

So, you gave it your absolute best shot, but you came second, or third, or last. Not to worry, these things happen. Well done for giving it a crack.

Once again, ideally, you will have been thinking about these things in advance of the outcome:

- What will you say (verbally or in emails/writing) to the voting principals?
- What will you say, and/or 'do', to the victor and other candidates?
- What communications are needed: to supportive fellow principals, your staff, your clients, others?
- Was the race so toxic, or is the firm's culture such that you need to leave the firm?
- Do you need a holiday or time off?

- Do you need any type of counselling/therapy?

13. What is your overall campaign plan?

Ideally, you will have a written ‘campaign plan’ of some description. Depending upon the role, your resources, support, organisation and commitment, the length, details and sophistication of such a plan are likely to vary considerably.

What should be in a campaign plan? Potentially all sorts of things, including the types of matters addressed in this document.

At the very, very least: have a ‘to do’ type list of essential campaign action items, deliverables, dates for interviews/presentations, commitments made etc, so that you don’t drop the ball on basic stuff.

14. What can you read, now that you have gained the role?

If you are the type of person who enjoys reading leadership/management type literature (I mean, who doesn’t?), here are some PSF-specific and other recommendations, in no particular order:

- Any books by the now retired PSF-guru David Maister, but especially the classic *Managing the Professional Service Firm*
- *Leading Professionals: Power, Politics and Prima Donnas*, by Laura Empson
- *Herding Professional Cats*, by Graeme Davies and Geoff Garrett

- *Professional Services Leadership Handbook*, by Nigel Clark, Ben Kent, Alastair Beddow and Adrian Furner
- *How to Lead a Values-Based Professional Services Firm*, by Don Scales and Fran Biderman-Gross
- *The Oxford Handbook of Professional Service Firms*, edited by Laura Empson, Daniel Muzio, Joseph P. Broschak and Bob Hinings
- *Smart Collaboration*, by Heidi Gardner
- *The Human Science of Strategy: What works and what doesn't*, by Dr Bob Murray and Dr Alicia Fortinberry
- *Leading the Future: The Human Science of Law Firm Strategy and Leadership*, by Dr Bob Murray and Dr Alicia Fortinberry. (NOTE: this is a great book and has relevance and application to other PSFs and not just law firms.)
- *Aligning The Stars: How to Succeed When Professionals Drive Results*, by Jay W. Lorsch and Thomay J. Tierney
- *Talent Wins*, by Ram Charan, Dominic Barton and Dennis Carey
- *Flying Without A Net*, by Thomas J. DeLong

Good luck with your pitch!

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