



Developmental assessment: assessing the leadership challenge in professional services firms

Globalisation, digitalisation of information, democratisation and rising employee expectations of the workplace are trends which organisations need to adapt to as the world becomes increasingly volatile, uncertain, complex and ambiguous (VUCA). For those leading professional services firms the additional challenges of the producer-manager remain; winning work, delivering the work (either directly or through supervising others) and running a business.

Assessing the qualities required for the future but which may not have been called for or witnessed in the past is the task which the HR colleagues are increasingly being asked to assist with.

Building and sustaining a profitable practice in a competitive environment has become more challenging in a globalised and increasingly commoditised market. Pressures on fees rates have never really eased even as the financial crisis has abated. The temptation for new partners as they build a practice or seek to win work is to discount, which may bring short-term success but is unlikely to be good in the longer-term.

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For new partners, making the transition to trusted advisor, going beyond technical expertise, whether in law, accountancy, engineering, or any other discipline is critical to adding value.

Changing employee expectation

Much has been written about Generation Z (see also our article at mdvconsulting.co/experience/articles) and the increasing challenge of line management and talent retention. Gone are the 'get on with it' days of the past as employees have greater expectations of people management. Highly mobile top talent demands engagement and regular feedback as to how they are performing, seeks to understand their place, and wants rapid development and a career path. These shifts in generational expectation were not necessarily thought about in the past by existing partners. In larger firms the HR function is there to align firm objectives with this

changing employee agenda ensuring the main effort of servicing clients is not jeopardised. Given the ownership structure, business services functions such as HR are often not as influential as in more corporate environments, and HR perhaps more than Finance or Technology suffers in that everyone often proffers to be an expert when it comes to managing people. In this context, partner behaviours as to how they lead, motivate, give feedback and develop others become more salient than in the past.

Doing things differently

Finally, in an evolving VUCA world, there are ever greater pressures on managing individual and personal demands on time. Significantly increasing non-fee earning responsibilities place added requirements on time management, work management and ultimately greater resilience. Many firms are transitioning to an understanding that some of these pressures can be alleviated by business services who can help. Where partners used to do it all they may need to learn to delegate, to put others to work, to work with non-lawyers or people from other professional disciplines. When your success has been predicated on delivering excellence in practice it can be difficult to let go or accept standards that may differ from one's own.

Transition to partner involves not only acquiring new skills and behaviours but very often unlearning or discarding attributes that may have been useful in the past but which may be less helpful or downright unhelpful in the future.

It is in this context that we seek to identify the future role demands and therefore future attributes required of partners, both those already in such a role (and who will need to adapt), and those that are being considered to join the partnership. Whilst in genuine partnerial cultures the decision will always rest with the partners, increasingly HR experts from within or without are being asked to assist with the decision making process through providing additional data and insights. Current assessment practices often tend to separate out the evaluation of the role demands from ongoing development but there are tremendous benefits in applying what we call 'developmental assessment'.

We believe it is possible to diagnose, measure or evaluate in such a way that an individual also finds the process informative, respectful and developmental.

Excellence in practice will always be best assessed by those qualified to do so. Whilst past performance is often a good predictor of future behaviour, the significant transition from senior employee to partner involves not only acquiring new skills and behaviours but very often unlearning or discarding attributes that may have been useful in the past but which may be less helpful, redundant or downright unhelpful in the future – the diligent associate who now can't let go and delegate as a partner and succumbs to perfectionist micromanaging, or the likable colleague who finds it difficult to make the tough people decisions as an employer. Assessing the qualities required for the future but which may not have been called for or witnessed in the past is the task which the HR colleagues are increasingly being asked to assist with.

Delivering true added value with assessment

Given what is at stake with either an internal promotion to partner or a lateral hire, candidates and indeed their internal sponsors have a vested interest in putting their best foot forward. Internal candidates who may have been under the spotlight for several years are likely to be well practised in presenting a face and a persona that others want to see. Clever people may be smart enough to second guess and attempt to manipulate the carefully constructed assessment process. Particularly lawyers, trained to take apart a complex situation and re-present the facts, the temptation may be to 'game' the assessment given the size of the prize or simply (we have found on occasion) for intellectual sport. How to deliver then the additional value add that the wider partnership is seeking; to augment decision making but to do so in a way that adds insight and isn't simply an additional hoop to jump through.

Our approach seeks to overcome the need for clients to choose between doing assessment or doing development

In our corporate work assessing and developing senior leaders we have come across many people for whom assessment was something that was done to them. Whilst some self-insight was often delivered through undertaking a questionnaire or going through an

assessment process the development that accrued was often limited. All too often it felt as if an 'expert' was dissecting the individual and presenting a report in the hope that reading the findings would spur the candidate onto taking steps to develop. In a high stakes assessment such as for a promotion or new job the emphasis was often on 'passing' rather than learning. Given partners may have 20-25 years in the role ahead of them upon being made up, this seemed a highly unsatisfactory approach. Given that making a difference, whether at the individual or firm wide level, is central to our mission, we set out to see how assessment can be informative and useful for both the firm's decision-makers and the participant.

Assessment or development?

We hear people often talking about assessment and development in a binary way – an intervention is for one purpose or the other. Some have described assessment and development as being on a continuum – harder edged 'yes / no' decision making at one end and purely developmental feedback or diagnostic at the other. We believe the choice to be a false one, that it is possible to diagnose, measure or evaluate in such a way that an individual also finds the process informative, respectful and developmental – providing a platform for self-directed behavioural change. We challenge the notion that being judged or assessed will always make people guarded and suspicious and therefore closed to self-reflection and learning.

As mentioned earlier, we work with leaders and aspiring leaders, some of whom have been subjected to all sorts of diagnostic tools and assessment hoops over the years, yet taken little real value from doing so. Equally we meet surprisingly many who have reached the giddy heights of a senior position without really stopping to reflect upon what is it that has made them successful and what might hold them back from further success or even trip them up. We've all seen successful people who have derailed, sometimes in spectacular fashion, when strengths became overused, or past behaviours became ingrained and imperious to adaption to changing requirements.

Our approach seeks to overcome the need for clients to choose between doing assessment – gathering data to evaluate – or doing development – diagnosing strengths and areas for development. We call it developmental assessment.

What is distinctive about this approach?

Inside out approach - Rather than dissecting people into a series of component parts, scores, scales and competencies, we work with individuals to develop a holistic understanding of their distinctive leadership capability. We find this enables us to generate an incisive view of performance and potential and powerful insights that fuel development.

Engaging experience - Developmental assessment is something we do with people, and not to them. Working in a relational manner through effectively engaging highly talented people, we encourage them to open up and reflect on their own capability, feelings and experiences and focus energy and attention on accelerating self and organisational development.

Expertise - Developmental assessors possess deep psychological expertise, forged by extensive executive-level experience, brought to life with warmth, pragmatism and a commercial edge.

What do we measure?

Many, if not most, organisations will have some form of competency framework or idea of key attributes. We believe that in complex organisations, it is deeply rooted personal attributes across three domains that enable sustained performance in partner level roles:

- core domain – judgement, drive and self-management
- interpersonal domain – relationships, influence and conviction
- organisational domain – political sense, practical grip and internal/external perspective

Spikes of talent and individual style combine to create a unique leadership signature. Our developmental assessment process enables the participant to sharpen awareness of their own signature, and discover how to best apply their leadership capacity within a specific organisational and commercial context.

Assessment components

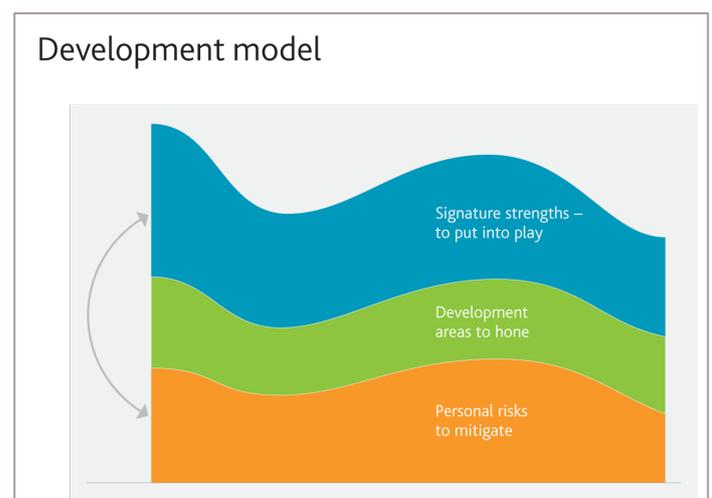
Whilst each assessment process varies by combining a selection of purpose-designed or ready-made components, at the heart of any design is the leadership interview which typically takes about three hours and covers current role, personal and career history, and future aspirations. The participants' reflections on past experiences and how these have shaped and continue to

shape their behaviours in the present provide a powerful means of working with and supporting the individual. The interview is designed to give a deeper and clearer understanding of leadership style, motivations, strengths and development areas. Whilst the detailed content remains entirely confidential, we draw out themes to inform the developmental assessment profile, firstly so candidates have a clear summary of these points and also to feed back into the decision making process.

Following the developmental assessment process, we prepare a detailed profile report and talk this through with the decision makers to work through implications and next steps. We work with people in ways they find stimulating and engaging. Following the process, we offer detailed individual coaching feedback to the individual, which acts a powerful launch pad for personal and group development.

Development model

Our development model builds on several well founded psychological approaches. We seek to leave people with three key perspectives: signature strengths, potential risks arising from the shadow side, when strengths are over used, and areas that could be honed or developed further. The combination of playing to strengths, mitigating potential risks and developing factors which are neither innately strong nor ingrained risks is a powerful combination for effective performance.



Summary

Given the challenges and complexities of partnership in the modern professional services firm new ways are required to work with existing and aspiring participants in a manner that unlocks potential, equipping and sustaining people for the long haul.

Assessing people from afar, clipboard and stopwatch in hand, is a recipe for game playing and usually a deeply unsatisfactory experience for all concerned – the participant, the firm and the assessor. Spending time and money on remedial development programmes that take people away from the coalface rarely delivers the full value promise made in the glossy marketing brochure.

Our view is to work with people in a manner that ignites the spark from within, to help people realise their true potential, to leverage strengths, but to watch for overplaying these. To reflect and learn from patterns of behaviour which may have served them well in the past but which are damaging to continued success. To leave them with the insight, motivation and wherewithal to address their own individual leadership challenge: the interplay between future aspirations, behaviours which can be deployed in the here and now, and which benefit both themselves and their firm.

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