



EMERGING  
LEADERS

a c a d e m y



Being a Leader in Everyday  
Situations



This session will require active participation and candid discussion. It's also designed to challenge you with situations that may take you outside your comfort zone.



# High Performance Partners

You'll work through three case studies to challenge you in the six areas of focus for high performing leaders.



Tasks for each case study:

1. Define the issues relevant to the case.
2. Discuss and determine the best approach.
3. Identify barriers to success in implementing that approach.



# Situation #1

As a new partner you're constantly gaining new information about the firm and exposure to the decision-making process. In the last partner meeting, there was a very passionate discussion about a new firm initiative. You were adamantly opposed to the initiative, but as a new partner you didn't feel comfortable voicing your opinion. Instead, you nodded along and smiled as you voted to move forward. Now you've been tasked with helping execute on the initiative and communicate the importance to your team. The problem is, you don't believe it's the right decision and don't even truly support it.

## Situation #2

Over the past couple years, you've noticed a troubling pattern related to resignations. Often, the firm is losing rising stars and the common refrain is "we see the partners and don't want that life." When you've brought it up to the partners, they brush it aside as a problem with the next generation's work ethic and sense of entitlement. Further, they have zero desire to change or improve the situation, stating "we tell them they don't have to be like us, it's their choice not to believe it." Knowing that your ability to cover retiring partners' benefits is contingent on retaining the next generation, you're trying to figure out how to solve this dilemma.



## Situation #3

As an up-and-coming partner in the firm, you've been tasked with creating a process to improve the firm's client mix each year. You know that doing so requires a combination of client acceptance policy changes and client culling. Having previously discussed a plan to get people on board with removing D-level clients, you're turning your focus to client acceptance and have encountered three key challenges to this process. First, the firm has a high concentration of clients in a low realization industry and the lead partner sees this as a personal attack designed to shrink his industry. Second, the current compensation system rewards revenue regardless of quality. Third, to be accepted, your process requires buy-in of the entire partner group.



# Team Exercise

Tackling these topics in a controlled environment is hard; handling them in the real world is harder. What lessons might you apply to these situations to help you handle have issues more successfully at your firm?







Thank you!

Contact us:

[JeremyC@UpstreamAcademy.com](mailto:JeremyC@UpstreamAcademy.com)

[HeathA@UpstreamAcademy.com](mailto:HeathA@UpstreamAcademy.com)

[CourtneyD@Forgeahead.com](mailto:CourtneyD@Forgeahead.com)

[GeorgiaC@UpstreamAcademy.com](mailto:GeorgiaC@UpstreamAcademy.com)

[KelseyM@UpstreamAcademy.com](mailto:KelseyM@UpstreamAcademy.com)

[RheesM@UpstreamAcademy.com](mailto:RheesM@UpstreamAcademy.com)