POISED *for* PARTNERSHIP

HOW TO SUCCESSFULLY MOVE FROM SENIOR ASSOCIATE AND SENIOR MANAGER TO PARTNER BY BUILDING A CAST-IRON PERSONAL AND BUSINESS CASE FOR PARTNERSHIP

HEATHER TOWNSEND

Poised For Partnership:

How to successfully move from senior associate and senior manager to partner by building a cast-iron personal and business case for partnership

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Praise for the book

"The jump from senior associate to partner can be huge and unfamiliar – this book is clear, practical and reassuring. It set me on the right route, at a solid pace, and gave me the courage to go for it. For someone who picked this book up along the way, Heather's ability to articulate the challenges facing a would-be partner is uncanny. Her step-by-step guide to overcoming those challenges is even better. Well worth the read"

FIONA HINDS, SENIOR ASSOCIATE HOWARD KENNEDY LLP

"I highly recommend Heather's new book Poised for Partnership as a must read for any Senior Manager, Senior Associate or Director who wants to take the step up to Partner. It has also been helpful to me in considering my firm's succession plan and the next generation of Directors."

JUDY DYKE, DIRECTOR AT TYNDALLWOODS

"This action-orientated and practical book expertly captures all the things which are crucial to making partner"

JOHN MOSS, JA CONSULTING

"This book is an invaluable aid to anyone considering the transition from associate to partner and employee to employer. Practical, thought-provoking and well-presented, the books allows you to dive in at any point, meaning that it is not just useful now, but will be for years to come."

KEVIN POULTER, LEGAL DIRECTOR BIRCHAM DYSON BELL LLP

"This is a great book which I recommend to anyone serious about making partner in a Big 4 firm. It's not easy going from being a fee earner with high chargeable targets to having your own client portfolio. This book gives you honest advice on how to go about making that transition."

ORLA POWER, SENIOR MANAGER, RISK ADVISORY EY

"Having made the somewhat daunting move from in house back to private practice with the primary aim of achieving partner, I am so grateful that I have found Heather Townsend and her books. This book has given me a clear structure upon which I can step up to the challenge, and with greater confidence than I might otherwise have had. This book is easy to read, I am certain this will help me immensely.

JONATHAN JAMES MORE, SENIOR ASSOCIATE

"Another excellent and highly relevant book from Heather Townsend. Achieving partnership is a two-way deal - between the aspirant and the firm and both parties must take responsibility in making it happen. This book sets out the template in a jargon free and practical manner and should be a 'must read' for both those that seek partner status and those primarily responsible for making the appointment."

PETER GILLMAN, EX-MANAGING DIRECTOR OF PRICE BAILEY LLP

"The only person who can help you make partner ultimately is you. You have to be motivated to make the journey. However, this book will help guide you and provide you will invaluable tips and fantastic insight. Regardless of how much help your firm gives you, this is an essential read. There is no silver bullet when it comes to making partner, but this will do a damn good job of helping you get there if you act on the advice it contains. I really wish this book had been around when I was making the journey."

PHIL MULLIS, PARTNER AT WILKINS KENNEDY LLP

"If making partner feels like a long, winding and challenging journey, this book will be your SatNav, navigating you successfully to your destination. This book is brilliant, and I would highly recommend it."

DEV MODI, MANAGING DIRECTOR, THE OMEGA ACADEMY LTD

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Introduction

> *"What is the recipe for successful achievement? To my mind there are just four essential ingredients: Choose a career you love, give it the best there is in you, seize your opportunities, and be a member of the team.*
>
> *BENJAMIN FRANKLIN FAIRLESS*

The toughest career transition you will ever make is the journey from senior associate/director through to partner. This isn't just another promotion. This is where you move from employee to business owner. Not only will you need to find the time to build your own practice, but also you will need to fundamentally change the relationships you have with your peers, partners and how you view your role going forward.

This book will be your secret weapon to successfully navigate the murky waters which lie ahead for you, as you take the final step up to partner. By reading this book and then taking action:

- You'll learn how to build such a compelling Business Case and Personal Case that your firm *has* to admit you to the partnership.
- The Partnership Panel Interview and pitching your Business Case will hold no fear for you
- You will know exactly what you need to say, demonstrate and prove to your partners to earn the right to join their exclusive club, and have *Partner* on your business card.

Terminology

Wherever possible I have tried to make this book as jargon free as possible. However, there are a few key words or phrases used consistently throughout the book.

Business Case: This is where you demonstrate to your partners the commercial advantage of making you a partner in the firm.

Personal Case: This is where you show to your partners that you think, feel and act at the standard expected of a partner in your firm.

Partner Track: The period of time, often between 0–3 years, when you decide to transition from senior associate/director to partner. Towards the end of the Partner Track you will start to go through the Partnership Admissions Process. Some firms will have a formal Partner Track process or programme where their high flyers will be groomed for partnership.

Partner Track Plan: Your overall plan to help you build a cast-iron Business Case and Personal Case to make partner.

Partnership Admissions Process: The formal or informal process that your firm uses to assess your suitability to be admitted to the partnership.

Partnership Vote: This is the last part of the Partnership Admissions Process where the partners all vote to decide who they will admit to the partnership.

Sponsoring Partner: The person in your firm who formally recommends that you should go through the Partnership Admissions Process. Without a strong recommendation from your Sponsoring Partner you are unlikely to be admitted to the partnership.

Junior Partner: The first grade of partner where most new partners begin.

Partner Panel Interview: This is a common part of many firm's Partnership Admissions Process. A panel of partners will interview candidates for partnership. During the interview candidates are often expected to present their Business and Personal Case for partnership.

Management Board: Most partnerships have the equivalent of a Board of Directors. The board may be called the 'Leadership Team', 'The Executive Team', 'The Board', or 'The Executive Leadership Group'. In this book it is referred to as the Management Board.

Partnership Selection Committee: This is a group of partners that the firm trusts to evaluate each candidate's Business Case and Personal Case, and recommend who they think is ready for partnership. In small firms the Partnership Selection Committee is very often the firm's Management Board.

Partnership Council: A Partnership Council is normally an elected set of representatives for the partners. Only the large firms tend to have a Partnership Council. Typically the Partnership Council will be used to review the effectiveness of the firm's leadership and management and has responsibility for partners' remuneration. The council is often used to ensure that appointments to the firm's leadership roles are handled effectively and in the right interests of the partnership.

What happens when you are on Partner Track?

No two firms operate in the same way. It is impossible to give a definitive timeline of what will happen to you as you go through Partner Track but diagram 0.1 will give you a good idea of what is likely to happen.

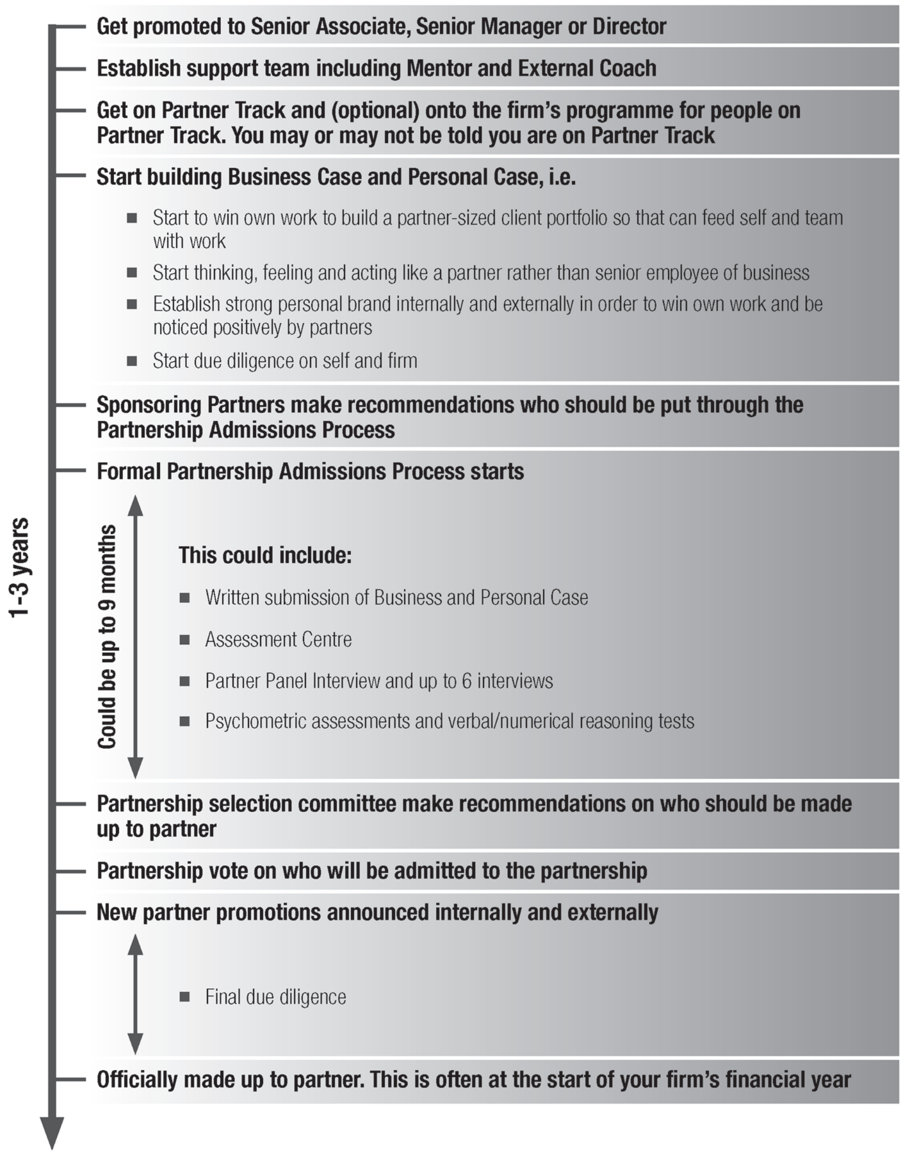

Diagram 0.1: What will happen when you are on Partner Track

Why is it so tough to take the final step up to partner?

Many talented and often brilliant professionals have failed to make the final step up to partner. So, what makes it so tough?

- The recent recession and ongoing uncertainty in the global and local economies have put firms' profit margins under significant pressure. As a result firms are deliberately reducing their partner numbers to protect the size of their drawings.
- Partnerships now tend to expect their future partners to have a client following before being promoted to partner. As a result your Business Case and Personal Case need to be built on top of the demands of your day job.
- There are normally fewer partner vacancies available than the number of people going through the Partnership Admissions Process. This means that the admissions process is competitive. You are up against other great professionals in your firm.
- A firm will decide on how many partners they will admit in one year. This is hugely dependent on the health of the firm's finances and the confidence within the partnership. Consequently you are very much reliant on market forces. Your Partners have to be very confident in the strength of your Business Case before they will admit you to the partnership.

Having said all of this, it is still possible to make partner. It is not the chosen few or the lucky ones who get through to the partnership. The people who do achieve the holy grail of making partner are the ones who are prepared to 100% commit to becoming a partner, pace themselves by prioritising and working to a plan, go fully outside of their comfort zone, and build the right team of people around them to help them get to partner.

When should you start to build your Business Case and Personal Case for partnership?

It can often take years to build a truly cast-iron Business Case and Personal Case for partnership. After all, large, profitable pieces of juicy client work don't magically appear. Building a partner-sized client portfolio takes hard work, planning and focus. The earlier you start the process of building your Business Case and Personal Case for partner, the easier the Partnership Admissions Process will become.

A Magic Circle firm in the UK used to formally start to prepare their future partners just before they were about to go through the Partnership Admissions Process. After receiving feedback from their senior associates they now do this work 2–3 years before they expect an individual to go through the Partnership Admissions Process. They know that if their potential new partners are prepared to put the time and effort in the 2–3 years before going through the Partnership Admissions Process, then the process becomes more of a formality.

If you are reading this book and thinking that you want to make partner in the next 12 months, but haven't yet started to create your Business Case and Personal Case, don't worry. It is not impossible to make it successfully through the Partnership Admissions Process without 2–3 years of preparation behind you. This book will show you the shortcuts you can make, and what to prioritise to give yourself the best chance of making it through to partner this time around.

What do you need to stop doing right now to get noticed and increase your chances of making it successfully through the Partner Track?

Firstly, stop thinking that getting to partner will be inevitable. Very few professionals who get to senior associate/director actually make it to partner. In fact, the organisation Leadership Skills, led by Tara Fennessy found that only 2% of people make it through the promotions process to partner in a Big 4 firm. The people who do successfully make it put the work in. The days of 'waiting your turn' or thinking that you will 'get the tap on the shoulder' are now long gone. It won't be you going through the Partnership Admissions Process unless you start to put the work in to build your Business Case and Personal Case for partnership right now.

It can be very easy to put off your own career development. After all, there is always something to do when you are a senior associate or director. If you are going to really make it to partner you need to commit to your own development. As you will find out in Chapter 1, the first steps are to create your own motivating career goals and then build your Partner Track Plan.

You need to put your head above the parapet and tell your partners that you are incredibly serious and committed to making partner. Your technical skills will not do the talking for you. Too many talented professionals let their career plateau by assuming wrongly that doing a good job is enough to get them noticed and fast-tracked into the partnership. The sooner you put up your hand and say, metaphorically " *I'm in*" the more opportunities will come your way. Those people who are realistic about the work they need to do, will be the ones who start having the right conversations and involving the right people earlier.

Being on Partner Track can be a lonely business. However, you don't need to do it all yourself. You can drastically increase your chances by regularly asking for help from your support team. Chapter 3 in the book will show you who you need in your support team and the roles they will play.

It is only natural that at times along the way you will worry about whether you will get there or not. Worrying is unhelpful and wastes emotional energy, so prioritising, taking action and planning is the answer. This book will help the process feel a lot easier. There are plenty of people who can help you at every step of the way as you learn to feel, look and act like you belong around the partnership table.

How to tell your partners that you are serious about your intention to progress your career to partner

It can be hard to tell your partners that you want to go for partnership. When I interviewed several new partners a few years ago, they all vociferously agreed that the first step to make partner in your firm is to tell a partner. So, why do so many professionals recoil from the thought of doing this? I've heard people say things like this:

- *That's not the way it's done in my firm*
- *It's too early to think about going for partner*
- *I don't want to come across as pushy or arrogant*
- *I'm worried they wouldn't take me seriously*
- *I'm worried that they will tell me I'm not good enough*
- *I don't want my peers (or partners) to think I'm getting ideas above my station.*

If you agreed as you read through that list, remember that most of it is probably in your head. The best way to see whether you have any chance of making partner in your firm is to voice your career ambitions to your Supervisor.

Now, how to have that conversation? It's probably not advisable to announce in a pub, slightly tipsy (or very tipsy) that you want to become a partner. Neither is telling a room full of your peers that you want to be a partner the best way to have the conversation. Don't even think about getting someone else to talk to your partner about your partnership prospects – are you a man/woman or mouse? If you are going to be a successful partner, you must be prepared to have a courageous conversation.

Here is how to have this conversation. Firstly, arrange to have a private conversation with your supervisor or the partner you work with most often. If you are asked for a reason for the meeting, say it's about *how I am getting on in the firm* (or something like that). In the meeting, after some chit-chat, ask the partner a couple of questions:

- *How do you think I am performing?*
- *Where could I be improving or strengthening my skill set ready for the future?*
- *What do you think about my potential for progressing my career in this firm?*
- *What skills or capability would I need to gain if I wanted to make partner in this firm?*

Questions such as these will underscore that you are keen and committed to progressing to partner – and will also naturally lead onto an easy conversation about whether you want to get to partner.

Who is this book for?

This book is written for knowledge workers who are employed within a professional partnership and want to take the final step in their career to make partner. This includes lawyers, accountants, management consultants, architects, consulting engineers and surveyors. The book is also a useful guide for anyone outside of a professional partnership who would like to make the leap from industry into a partnership role.

Whilst the book primarily caters to the needs of experienced professionals who are on Partner Track and 0–3 years out from making partner, people responsible for talent management, leadership development and senior associate/director level development will also find this book invaluable.

If you are a senior associate, senior manager, director or head of a firm's practice management department, who wants to take the next step to make partner, this book will:

- Answer the burning, and often unanswered, question *What do I need to do to progress my career to partner around here?*
- Show you how to create a cast-iron Business Case and Personal Case for partnership, even if your firm doesn't have a formally communicated Partnership Admissions Process.
- Support you to pace yourself so you don't get burnt out before you have a shot at partner.
- Help you get noticed by the partners in your firm as a potential future partner.
- Give you tried and tested strategies to shine and progress successfully to the end of your firm's Partnership Admissions Process.
- Arm you with the right questions to check that partnership in your firm is 100% right for you.
- Help you to reduce the reputational and financial risks associated with making partner.
- Clearly show you what skills, attitudes, behaviours and experience you will need to demonstrate to rapidly progress to partner.

If you are currently in industry and wanting to join a professional partnership as a partner, this book will:

- Show you how to evidence a strong Business Case, even if you have no previous experience of selling services.
- Give you a guide for how to make yourself as attractive as possible to a partnership.
- Clearly show you what skills, attitudes, behaviours and experiences you will need to demonstrate to be recruited in at partner level in a professional services firm.

- Support you to reduce the reputational and financial risks associated with joining a partnership as a new partner.
- Arm you with the right questions to check that the partner role being offered is 100% right for you.
- Give you tried and tested strategies to shine and progress successfully to the end of your target firm's Partnership Admissions Process.

If you have picked up this book because you have been asked to help your own practice or advise a practice on leadership development, talent management and succession planning matters, you will find this book to be a jargon-free, rich source of advice.

At the moment, this book is the only widely available definitive guide to help people take the step up from senior associate/director to be formally admitted to the partnership. The book will become an invaluable, well read and scribbled on book for anyone responsible for talent management or succession planning within a professional practice.

How to use this book

This book can be used in two different ways. It can be read from cover to cover. Or you can use the Partner Track Self-Assessment Tool to see where you need to strengthen your Business Case and Personal Case for partnership. Then go to the relevant chapter to dip in and out of the book as you progress along the Partner Track. If this book is going to help you build a cast-iron Business Case and Personal Case for partnership don't ignore the exercises or questions it poses. No-one ever made it to Partner without going outside their comfort zone.

As you read through the book, it is time to be brave and make the time to answer the questions, and complete the action points in each chapter.

At the end of each chapter there are:

- actions for you to put into practice what you have just learnt; and
- links and references to further resources.

The Career Kitbag

Throughout the book this symbol will show you where there is a resource in the Career Kitbag at http://www.howtomakepartner.com which will help you.

The Career Kitbag contains over 40 free and downloadable resources. These resources include plans, templates and guides, all designed solely to meet the needs of professionals in practice who want to progress their career.

The Partner Track Self-Assessment Tool

Before you go any further in this book, download your copy of the Partner Track Self-Assessment Tool and fill it out. Your results from the tool will help you prioritise which chapters you need to read first.

The Partner Track Self-Assessment Tool is available to download in the Career Kitbag.

For each of the statements in the table rate yourself between 1 and 5. After you have finished rating yourself, prioritise reading the chapters where you have scored the lowest.

Poor/Rarely = 1	Your score (1-5)	Excellent/Always = 5	Go to chapter
Creating the space, energy and desire to make it through Partner Track to Partner			
I haven't given my long-term career much thought. My main focus is getting through the day.	1 2 3 4 5	I know exactly where I want my career to be in 10 years time. I have detailed plans in place to help me get there, which are broken down into achievable and motivating milestones. I look at my career plan at least monthly. The actions I want to take for my career plan are included on my Weekly Planner.	Chapter 1
I am very concerned how I am going to achieve everything for my day job let alone what is needed to build a strong Business Case and Personal Case for partnership. I have not got a specific plan to help me through Partner Track or the Partnership Admissions Process, so my progress is sporadic at best.	1 2 3 4 5	I have built as part of my career plan a specific plan to enable me to get to partner. Within this plan I have identified my priorities and divided up what I need to achieve so I have paced myself appropriately. My Sponsoring Partner, Mentor and External Coach have reviewed and contributed to my plan. I am enthused and inspired to implement my plan and have already taken decisions and actions to make sure my Partner Track Plan gets achieved each week.	
I struggle to keep on top of everything at work, and I am often fire-fighting. My inbox is generally full, and I am not the best for returning calls. I am often getting feedback that I need to be more organised and structured at work.	1 2 3 4 5	I am known for being highly organised with my telephone and e-mail communications, plus filing. At the end of each day my inbox is reduced to zero, my desk is tidy, and I have a To Do list written for the next day, which allows me to switch off after I leave work. I am completely up-to-date with all my expenses, timesheets and reporting requirements.	Chapter 2
I operate on a reactive, fire-fighting basis each day, focusing on completing urgently important tasks first and working on high importance items whenever I can fit them in.	1 2 3 4 5	I operate according to a default calendar and prioritise my activities based on high importance items first and urgently important items second. My Weekly Planner includes urgent items as well as long-term important items for my career.	
I don't feel as if anyone in the firm cares about me or my career.	1 2 3 4 5	My partner, Mentor and Head of Department completely support and endorse my 3-year Career Plan. They are actively helping me to build my skill set and experience to achieve my short-, medium- and long-term career aims.	Chapter 3

I don't feel supported inside or outside of work, and assume that I need to get on and do it all myself.	1 2 3 4 5	I have a team of people inside and outside of work who support me to be my best inside and outside of work. These people include my Partner, Mentor, Head of Department, External Coach, 'life' partner, friends inside and outside of work.	Chapter 3
I have no aims for my life outside of work, and my work tends to stop me having time for anything other than work and sleep.	1 2 3 4 5	I have goals and milestones for my life outside of work. I am actively working on achieving these goals so that I feel like I have a meaningful life inside and outside of work. As a result of my focus on having a life outside of work, I would say that I am genuinely happy most of the time. I consciously make sure that I am making time for myself and key relationships outside of work.	Chapter 4
I am frequently ill and feel burnt out or highly stressed for much of the time. It is rare for me to get a good night's sleep and I rely on caffeine (and maybe other stimulants) to keep me going through the day.	1 2 3 4 5	I actively look after my mental, physical and spiritual health. I am rarely ill and am seen to have good physical strength. I have good energy levels and wake most mornings feeling refreshed and ready for the challenges ahead.	
Doing your research on you and your firm			
I have not spent much, if any, time building my own self-awareness. I am often surprised by the feedback I am given.	1 2 3 4 5	Using data from psychometric profiling tools, 360° feedback, competency frameworks and performance reviews I have a good level of self-awareness and where my strengths and weaknesses are. I know I will be a good fit for partner in my firm.	Chapter 5
I don't know what my personal values are, and don't feel as if I fit in at work. I often have to compromise on what I feel is right, or what I want, to fit in with what my firm wants from me.	1 2 3 4 5	I know my personal values and how these guide me on a daily basis. My values are closely aligned to my firm and departmental values. I feel like I fit in at work and know that I am seen as one of the club.	
I have no passion for what I do, but don't know what I would do if I did something else.	1 2 3 4 5	I love my work, and feel proud of my firm. It is quite common for my work not to feel like work. I have great people working around me who I love working with.	

How the firm is financed and its overall people, financial and marketing strategies are a mystery to me. No-one has yet taken the time to explain what I would be required to achieve as a junior partner.	1 2 3 4 5	I have been given full access to the firm's financial records and am clear on the financial risk I will be taking on if I decide to buy into the firm. I have got an external advisor to look through the firm's management accounts for the last 2 years. I know exactly how much support I will receive and what I will be required to do to hit my numbers and progress into the partnership.	Chapter 6
Creating a persuasive and compelling Business Case for partnership			
I have not got a Business Case for partnership.	1 2 3 4 5	I have been working on my Business Case for the last 1–3 years, and have the backing of my Sponsoring Partner, Mentor, Head of Department and other key stakeholders in the firm. I have got opinions and ideas for my Business Case from key stakeholders in the partnership.	Chapter 7
I am yet to really build my own client following. If I have a client following, it is not important to the firm.	1 2 3 4 5	I have built a partner-sized client portfolio, and if I left the firm, most of this portfolio would come with me. The portfolio is strategically important to the firm.	
Key account management for my clients is rarely done at all. There are no relationship plans in place for key clients. Clients are rarely, if at all, categorised.	1 2 3 4 5	All clients have been categorised, and service levels delivered based on the client category. Key accounts have been identified and each key account has a proactive key account plan, relationship plans and the plans are helping gain a greater slice of the client's business. Client portfolio analysis is being proactively completed.	
I do not have a marketing plan to produce a predictable number of leads, improve conversion rates, increase the average revenue per transaction and increase the transactions per client. The results of spending on marketing and advertising are unmeasured and unmanaged. Any revenue growth is largely down to luck.	1 2 3 4 5	I have an aggressive, measurable marketing plan to produce a predictable number of leads, improve conversion rates, increase the average revenue per transaction, and increase the transactions per client so profits increase significantly. Results of the marketing plan are being measured and improved on a weekly basis.	

Client service standards and processes, if in place, are not automatically followed.	1 2 3 4 5	I make sure my team members are committed to deliver extraordinary client service. Our client proposition is tailored to each client, and there are processes and systems in place to make sure we deliver and delight each client. My current client base regularly recommends my team and me to the right type of client.	Chapter 7
It is very difficult to distinguish between my peers and myself. I have not taken the time to truly develop a niche, and are more concerned with how to make myself as attractive as possible to as many clients as possible.	1 2 3 4 5	I am known as the Go-To Expert for a technical or sector specialism, both inside and outside of the firm. I am regularly consulted for my specialist expertise and often get quoted in industry, local and national press. If you did a Google search for me you would instantly get how I help my clients. I am able to charge premium rates for my time compared to my peers. As a result of my external market-facing profile, I regularly bring in opportunities for others in the firm.	Chapter 8
I may have a LinkedIn profile. When I network, I mostly focus all my efforts on face-to-face networking. My on-line presence is limited to my bio on the firm's website.	1 2 3 4 5	I have an active on-line presence where I regularly engage with my clients, prospects and introducers. My LinkedIn profile is fully completed and a great shop window for what I do. I regularly write about what I do on the firm blog and/or my LinkedIn profile (as part of the LinkedIn publisher function). My profile is viewed at least once a day by potential introducers and clients. I interact daily with my network on social media.	
I don't have a Content Plan, and rarely produce any content.	1 2 3 4 5	I have thought about what type of content I need to produce to help engage my ideal client at each stage of their buying journey. I have a Content Plan and regularly produce different types of content on schedule. My content is regularly read/listened to by the type of people I want to meet and engage with. The content I produce and share helps me generate the right amount of leads, reduce my client's time to buy and increase my conversion rate.	
I have not yet had the opportunity to build up my own networks of introducers.	1 2 3 4 5	I maintain regular communication with a close network of introducers who regularly refer and recommend me to my ideal clients. I am equally proactive at helping them achieve their business and career aims. I have a formal plan to keep in touch with my best introducers. I use both face-to-face and on-line tools to help keep me top-of-mind with my network of introducers.	Chapter 9

I spend little, if any, time working on building and nurturing my network. I very often turn up at events without a purpose for being there. My LinkedIn profile is pretty empty and if I use Twitter or Facebook it is for personal reasons only.	1 2 3 4 5	I am actively working on building and nurturing a network, which will help me achieve my short-, medium- and long-term, goals and milestones. I use both on-line and off-line networking tools to help me achieve my networking aims. I have a daily, weekly, monthly and quarterly Networking Routine to help me keep my network warm and supportive.	Chapter 9
Becoming a 'member of the club'			
I have a limited or non-existent fan base from the partners, and most partners would be surprised to hear that I am keen to go for partnership. I am not known outside of my practice area. I am not sure whether I have the support of the lead partner of my practice area.	1 2 3 4 5	I have built a reputation within the partnership where I am already seen and viewed as a partner, or 'one of them'. I have been told I am on Partner Track. The skill set, strengths and talents, which I bring to the partnership, are recognised and wanted by the partners. I have a large and wide fan base in the partnership, with many partners actively pushing for me to be made up to partner. I am well known outside of my practice area and have spent time working in other offices throughout the firm.	Chapter 10
I often receive feedback that I need to work on my profile. It's not uncommon for me to find that I am scrambling about for work. I sometimes feel as if I am at the bottom of the list to get picked for an assignment.	1 2 3 4 5	I am a high profile and visible member of my firm and department. People regularly talk about me as 'one to watch' and 'partnership potential'. Partners and managers actively try to get me to work with their clients. Clients regularly ask for me to work on their stuff.	
I don't yet have the confidence or presence that a partner needs. Most people tell me I need to work on my gravitas and executive presence if I am to gain the respect of my peers, team and generate more of my own work.	1 2 3 4 5	People inside and outside of the firm treat me as if I am a partner. When I talk people listen to me and give me the level of respect that partners in the firm are due. People from outside the firm are often surprised to find I am not a partner yet.	Chapter 11
The team around me do not support my career path to make it to partner. They are likely to protest, leave or make my life difficult if I get made up to partner.	1 2 3 4 5	My team fully support my career aspiration to make partner.	

I (and my team) am struggling to hit our targets and numbers. Our Business Development efforts are struggling to bring in the right clients at a profitable fee level.	1 2 3 4 5	My team and I regularly hit our financial and billing targets. I (supported by my team) am hitting and exceeding my new business target. Clients are invoiced promptly, and every member of my team has a chargeable time target as well as a WIP and Lockup target.	Chapter 11
I rarely delegate to members of my team, and find that I spend too much of my time helping sort out conflict and problems with my team. On the rare occasions I do delegate to my team I find that the work comes back sub-standard and I need to often re-work it.	1 2 3 4 5	I have an incredibly supportive high performing team who are able to get the work done to a high standard with minimal intervention from me. I trust the team and regularly delegate work to them to allow me to focus on higher value work and winning more work from clients	
No plan exists to identify and intentionally develop the talent within my team. Development for my team members happens on a haphazard basis, often based on who shouts loudest. There would be a big gap in my team if I got admitted to the partnership. I don't have a successor for me in my current role.	1 2 3 4 5	A plan to identify and intentionally develop emerging managers and leaders is carefully monitored by myself. Each member of my team has a personal development plan to help them perform and develop in the short, medium and long term. I regularly sit down with each member of my team to talk about their performance and development. A successor has been identified for my role when I get admitted to the partnership.	
There is no rhythm of regularly scheduled team meetings and the communication from team members and stakeholders is inconsistent and inefficient. Off-site planning meetings are rare and decisions are communicated haphazardly throughout the team and department.	1 2 3 4 5	A rhythm of regularly scheduled team meetings for goal setting, reporting and accountability take place on an annual, quarterly, weekly and daily basis. Decisions made by senior people in the team and key stakeholders cascade quickly and easily through the team.	
If difficult conversations happen at all, they rarely go well. There are high levels of WIP and Lockup, and debtor days are very high.	1 2 3 4 5	Timely feedback (both positive and negative) is regularly given to all individuals in the team. Critical feedback is always given sensitively and in private. Difficult conversations with clients – particularly billing matters – happen promptly and successfully.	

There is little or no awareness of personality differences. Irritating communication patterns continuously plague the team and conflicts remain unresolved. A culture of frustration with the unadapted behavioural style of other team members exists.	1 2 3 4 5	The team has embraced a system for understanding and maximising the inherent synergies of personality differences. Communication is healthy and conflicts are resolved easily as team members adapt to the behavioural style of other team members.	Chapter 11
The final stages of Partner Track			
I plan to sort out my pitch the week before my partnership interviews. I know I need to make time to practise and hone my Business Case pitch, but know I wouldn't have the time to do this justice. The slides for my pitch, if I have any, are mostly 'cut and pasted' sentences from my Business Case for partnership.	1 2 3 4 5	I have practised many times my Business Case pitch for partnership, and am now word perfect. My pitch is a condensed version of my Business Case with key parts of my Personal Case interwoven within the pitch. Every word included on my slide deck has been carefully crafted so there are no wasted words or unqualified/non-evidenced statements. I have practised my pitch and panel interview questions with a combination of Sponsoring Partner, Mentor and External Coach.	Chapter 12
I have never really considered these three questions, let alone have answers to them. • *Why should I be admitted to the partnership?* • *Why should I be admitted this time around to the partnership?* • *What is the risk to the business of not promoting me this time around?*	1 2 3 4 5	I can clearly and distinctly answer the questions: • *Why should I be admitted to the partnership?* • *Why should I be admitted this time around to the partnership?* • *What is the risk to the business of not promoting me this time around?* I have consulted with my Mentor and other influential partners to get the answers to these questions just right.	
The Partnership Admissions Process is a complete mystery to me. I have not prepared for any of the stages in the process and am relying on my ability to do my best on the day.	1 2 3 4 5	I know exactly what will happen to me throughout the Partnership Admissions Process. I have prepared for each element of the process and taken my time to get to know my interviewers wherever possible.	

PART I

Creating the space, energy, time and desire to make it to partner

Successfully getting through the long slog that is Partner Track requires a solid foundation. It is this firm foundation, which gives you the space, energy, time and desire to create the best Business Case and Personal Case possible.

In this part of the book, we consider how to create this firm foundation by:

- Creating your Partner Track Plan
- Finding the time to fit in all the extra demands on your time that being on Partner Track brings
- Forming a support team
- Keeping your mind and body healthy

1

Creating and writing your own Partner Track Plan to make it to partner

Topics covered in this chapter:

- What needs to be in your Partner Track Plan
- How to create your Partner Track Plan
- How to balance your workload to make it through Partner Track
- The importance of gaining feedback from others

> *Developing the plan is actually laying out the sequence of events that have to happen for you to achieve your goal.*
>
> *GEORGE L. MORRISEY*

Look back on your career to date. I suspect that as your career has progressed you have significantly increased the demands on your time both inside and outside of work. As a non-partner your primary focus has been on client service and working with your partner to deliver to the clients' satisfaction. However, building a successful Business Case and Personal Case for partner means you now need to be seen to be actively bringing in new business and taking part in the day-to-day management of the firm. As if this wasn't enough, you will still be expected to hit your chargeable time targets. After all, very few firms can afford for their most expensive fee earners to become unprofitable in the years that they are on Partner Track. As a result, the challenge that everyone on Partner Track faces is how to create the time to build a compelling Business Case and Personal Case.

In this chapter we explore how to find the time to still fulfil your day-to-day responsibilities whilst carving out more time to build up your own client following and how to develop a team to support you.

What needs to be in your Partner Track Plan

Your Partner Track Plan is what will keep you literally on track to achieve your career aim of being voted into the partnership. Given the many demands on your time when you are on Partner Track, it can be so easy to lose focus on what is important to you right now. This is where your Partner Track Plan comes in.

There are multiple parts to your plan. What goes in your plan will be personal to your own particular circumstances. However, it is likely to contain all or some of the following parts:

Business development plan:

This is used to show your partners that you are able to build and maintain a partner-sized profitable client portfolio. It is likely to contain:

- Your personal marketing plan to attract new clients
- Key account plans to grow your current client portfolio and generate work-winning opportunities for other people in the firm
- A Networking Strategy to build strong Referral Networks, grow your profile and extend your reach
- Relationship plans for your key contacts
- Your pipeline and what you need to do to progress each opportunity so that it becomes a client.

Internal PR campaign plan:

When it comes to the Partnership Vote you want every partner to say *yes* to you becoming a partner in the firm. This means that they need to know who you are, respect you and feel that you are already thinking and acting like a partner. Your internal PR campaign plan is likely to contain:

- A stakeholder map of the key movers and shakers in your partnership and how you intend to positively influence and engage with them
- An activity plan to grow your profile across the firm.

Personal development plan:

The skill set needed by partners in a firm is very different to non-partners. For example, most people find that running a business is a skill set that needs to be learnt rather than something that comes naturally to them. This part of your plan is likely to contain:

- How you will gain the skill set and experience to be seen to be acting as if you are already a partner.
- Identification of your weaknesses and strengths, and how you will capitalise on your strengths and mitigate your weaknesses.
- How you will actually get the time to recharge and keep your energy high.

Team development plan:

You are unlikely to make it to partner without the support of a team behind you. After all, you don't want your own partnership ambitions to be jeopardised by the lack of successor to take over your current workload! This part of your plan is likely to contain:

- Individual development plans for your team
- A development plan for your whole team to engage them in your personal vision for the future.

Short-term 90-day action plan:

With so many plans to keep an eye on, it can be easy to forget about the action steps in one of the plans. Your short-term 90-day action plan will be where you condense all of your plans into one document detailing what you need to do and achieve in the next 30, 60 and 90 days.

Within the Career Kitbag are downloadable templates for all parts of the Partner Track Plan, with full instructions for how to use them

How to create your Partner Track Plan

Start with the end in mind

> *If you don't know where you're going, any road will get you there.*
>
> *LEWIS CARROLL*

Let's get serious now. When do you want to be made up to partner? This year? Next year? Within 5 years? Before you can put a plan together to create your Business Case and Personal Case for partnership, you need to know what you have to demonstrate, evidence or achieve before you will be recommended for partnership. This information will help you form the Goals you need to achieve to make partner.

Having clarity about Goals allows you to decide whether something is, or is not, a priority; i.e. do you need to invest time in this?

Goal setting will focus your acquisition of knowledge and help you to organise your time and resources so that you can make it to partner. Your self-confidence will improve as you achieve your Goals. Telling other people about your Goals is an excellent way of committing yourself into action.

The difference between Goals, Milestones and Objectives

Goals: These are what you want to achieve in the future, and are focused on your life inside and outside of work

Milestones: These are sub-goals, which if achieved will help you realise your Goals

Objectives: These are the specific, measurable actions you will do to accomplish your Milestones

Don't confuse good intentions with action. It can be very easy to delay writing your Partner Track Plan. After all, there is always something more pressing to do. In my experience, there will never be a right time to get started. If you are serious about making it onto and through Partner Track to partner, the time to take action is now. Merely saying you want something, won't make it happen

Case study: Clarice

Clarice decided she wanted to make partner by the time she was 40. After working with her coach, she set the following goals as part of her Partner Track Plan:

- *Business Development:* Build my client portfolio so it is worth £750,000 to the firm by Dec 31st 2015
- *Internal PR Campaign:* Have at least 30% of the equity partners backing my application for partnership by Dec 31st 2015
- *Personal Development:* Be performing at the level expected of a junior partner as set out in the firm's competency framework by Dec 31st 2015
- *Team Development*: My team will be highly supportive of me and able to service the client work I delegate to them without me needing to be involved by Dec 31st 2015

How to find out what you need to do to make partner, when no-one knows what you need to do

Many firms, including some very large Top 50 UK-based accountancy and legal firms, do not have a formal or structured process to get to partner. This is both a blessing and a curse! Even if your firm selects and votes on future partners in total secrecy, without their future partners even knowing they are being voted into the partnership, there are certain standards that you will need to achieve. These are:

- Demonstrate or show strong potential that you can grow and profitably manage a partner-sized client portfolio
- Be trusted to run and own a slice of the firm
- Be able to lead and develop a team to service the work you win
- Work harmoniously with the firm's existing partners
- Exhibit long-term commitment to the firm and its Values and Vision for the future.

Setting your priorities

Given the magnitude of the task ahead of you, it is not uncommon, like Clarice in our example, to have identified multiple Goals to get to partner in your ideal timeframe. Sometimes having many goals can overwhelm you and stop you from achieving any of them because you don't have the time to invest in any of them properly. Giving each of your Goals a priority level can help you focus on what is more important to start progressing earlier. For example, if your ideal client is a large multinational company you are likely to have a long sales cycle. If you are in that situation it makes sense for you to prioritise your business development related Goals ahead of working on your Personal Case for partnership.

Converting Goals into Milestones

Big Goals can be very daunting. It's only when you break them down into smaller more achievable sub-goals – Milestones – that you will find the motivation to start working towards your Goals.

There are many different ways of chunking down large Goals into smaller Milestones. To help you identify your Milestones, give yourself a quiet 30 minutes and the space to think by removing distractions from around you. For each of your Goals break them down into Milestones and attach a timeframe to each. You may find it helpful to write these down using a spreadsheet, calendar or Gantt chart.

Case Study: Sarah (Part 1)

Sarah had a Goal to build three Referral Networks which would bring her and the firm new business. She split this Goal into the following Milestones:

3-month Milestone

- Physically meet at least 10 people who would be able and willing to refer me work from manufacturing clients

6-month Milestone

- Have identified the members of my three Referral networks
- Received my 1st referral to a new manufacturing client from my three Referral Networks

1-year Milestone

- Generate £75k of new client work for the firm from my three Referral Networks

2-year Milestone

- Generate £250k of new client work for the firm from my three Referral Networks

Use the Career Kitbag's Goal, Milestone and Objective Planner, to record your Goals, Milestones and Objectives to achieve each Goal.

Converting Milestones into Objectives

Now that you have identified your Milestones to enable you to achieve your Goals, it is time to turn them into specific, measurable, shorter-term Objectives, which identify *what* you need to do to achieve your Milestones within the desired timeframe.

Case Study:
Sarah (Part 2)

Sarah, took her 3-month Milestone and decided on her Objectives to help her achieve this Milestone.

- By 30th January identify at least three conferences, forums or networking groups where decision makers in manufacturing companies network.
- By 28th February complete my research to find Audit, Corporate Finance and Tax professionals in local accountancy firms who specialise in manufacturing companies
- By 15th February meet with my Mentor to pick her brains for who she thinks I should be talking with to find members for my Referral Networks

Some tips on effective Objective setting:

- Write your Objectives as a single sentence, containing what you want to do to achieve your Milestones
- Write them down and share them with other people
- Review them every three months
- Make sure you include a timeframe; e.g. weekly or ‘by this date’
- Check that they are realistic and measurable.

How to balance your workload to make it through Partner Track

Every time I have spoken to someone who has successfully made the jump to partner, they tell me about the focus and dedication that it takes. To be focused means you need to know your Goals and what you want to achieve in the short, medium and long term. If you have these Goals and road maps of how you will build a cast-iron Business Case and Personal Case for partnership, you are then able to evaluate each opportunity against these – *will they help me achieve them or not?* You can then turn down the opportunities that will distract you from achieving your career aim of becoming partner.

Prioritise your development

At present, your diary is undoubtedly filled with fee-paying client work. In order to advance your career, you now need to add a new client which is YOU. Pursuing your own development requires time allocation, so treating your Partner Track Plan as an additional client is basically giving yourself permission to devote chunks of time to accomplish the necessary development work. To the extent that you can, assigning chunks of diary time to your Partner Track Plan should be done within your regular working hours, because from your perspective, the Plan is valid work, which leads to a future benefit for you.

Case Study:
Mike

Mike was a senior associate in a Top 50 UK law firm. He had high billable targets to hit and was in demand from partners to help them with their clients. This was stopping him going out and developing his own client base and increasing the number of 'matters originated' that would be credited to him. He decided to set aside Monday morning for business development. He built himself a 'must do' routine for his weekly business development tasks. As a result of this level of focus on business development he found that his leads and matters originated doubled within six months.

Pace yourself

Making the transition to partner from senior associate/director is really a marathon not a sprint. Therefore, be honest with yourself and take it one small step at a time. We tend to over-estimate what we can get done in the short term and under-estimate what we can do in the long term. Putting one foot in front of another at a steady pace is what is going to get you to partner in one piece.

Create time to review progress

It is too easy to always be looking towards the next thing you need to achieve. However, being on Partner Track is a time for incredible personal growth and change. Therefore, it is important that you set aside time to review what you have learnt, and what you need to focus on in the next 90 days. It is a good idea to put aside some time every month, potentially with your Sponsoring Partner, Mentor or External Coach, to do this.

Summary

The hardest part of making partner is finding the time to build a strong Business Case and Personal Case for partnership. Using a Partner Track Plan, which you review regularly, will help you create the focus and discipline to still hit your numbers whilst building a compelling case for partnership.

Setting yourself Goals will help you commit to what you want to achieve. Breaking down these Goals into smaller more manageable Milestones, will make these more achievable. Progress, which helps to build confidence and momentum, will be more visible when you identify Milestones and Objectives to achieve these Goals.

Action Points

1. Write a first draft of your Partner Track Plan using the downloaded template from the Career Kitbag:
    1. Decide when you would ideally want to make partner
    2. Turn this into your Business Development, Internal PR Campaign, Personal Development, Team Development Goals and non-work related Goals
    3. Using the results of the Partner Track Self-Assessment Tool, identify your short- and medium-term priorities
    4. Break down your Goal to make partner into Milestones
    5. To achieve your first Milestones, create your 3-month Objectives
    6. Write these Objectives into your Weekly Planner.
2. Block out regular chunks of time in your diary to work on and review your Partner Track Plan

Further resources

BOOKS

For more advice on goal setting and planning, I recommend these books:

- *Eat That Frog!: Get More of the Important Things Done – Today!*, Brian Tracy, ISBN 978-1444765427
- *The 7 Habits of Highly Effective People*, Stephen R. Covey, ISBN 978-0684858395

WEBSITES

- Free Partner Track Plan template and instructions how to build your Partner Track Plan: http://www.howtomakepartner.com

2

How to find the time to create your business and personal case

Topics covered in this chapter:

- Common time leaks when on Partner Track
- How to adopt the right mindset to get the day job done and create the time to build your Business Case and Personal Case for partnership
- How to stop distractions and interruptions, such as phone calls and e-mails from limiting your daily productivity
- How to stop meetings from eating up your day
- How to delegate effectively

> *“Lack of direction, not lack of time, is the problem. We all have 24-hour days.*
>
> *ZIG ZIGLAR*

In the first chapter we explored the fundamental difficulty involved in the transition to partner: how to still hit your numbers whilst carving out time to build your Business Case and Personal Case for partnership. In fact, for a few years you are going to have two jobs: The day job, and then your extra job to build your own practice to demonstrate your readiness for partnership. This means you are going to have to manage your time very carefully. This chapter will give you some thoughts about how you will actually get everything done.

What are the most common time leaks when on Partner Track?

Of course, you can't actually leak time. However, you can waste time both intentionally and unintentionally, which will cause you to be ineffective or unproductive. Here are the most common 'time wasters' for people on Partner Track:

Networking for networking's sake

When you are told you need to start to bring in your own work, what is the first thing you do? Go networking. Of course, done well networking is one of the best ways to grow your profile and generate new business. If you haven't taken the time to really consider why you are networking, the brand you want to build, and the people you need in your network, you may as well have not gone out networking in the first place. Chapter 8 and 9 of this book will help make sure your networking is fit for purpose.

Poor management of junior staff

Continual disruptions, poor quality work, too much time spent reworking, are some of the most common complaints I hear about junior staff. Most of these complaints don't stem from poor quality junior staff. They stem from a lack of good management of your team. Chapter 11 will help you polish your people management skills and build a high quality team who you can trust beneath you.

Learning to say "no"

When you are trying to build a high internal and external market value it can be tempting to think that you have to say "*yes*" to everyone. The reality of the situation is that you will always have partners or team members asking you for things or members of your network wanting to meet you for coffee. Too much "*yes*" can easily lead to overwhelm or not having enough time to do the things that really matter. The best ways to gracefully decline involve:

- Helping them find a solution without using you, e.g. "*have you tried using…?*"
- Explaining your time constraints and finding out if they have any flexibility on timescales or how they want things to be done.
- Using your secretary to manage your diary and act as a gatekeeper for people who want to meet you.
- Offering to help them a little but not the whole hog, e.g. "*No, I can't do that, but I can do this.*"
- Ask for time to think about it. You may find that the request goes away or you find a way to fulfil the request in a way that works for you and the other party.

Lack of delegation or poor delegation skills

If you are going to expand the amount of time you have to build your practice you will need to learn to delegate well to more junior staff. Delegation, and how to do it well, is explored fully at the end of this chapter.

Not knowing what you need to do to build your personal and business case

There is often a huge amount of mystery and conjecture about exactly what it takes to make partner in a firm. This can result in heartache and frustration, leading to procrastination, delays or mistakes being made on the way to making partner. Frequently, many people on Partner Track feel, often wrongly, that they can't ask the right questions to find out exactly what they need to do to make it to partner. The best way to avoid this happening to you is to assume that there is no wrong question, and seek out the right information and best source of advice you can find. This is why I recommend in the next chapter that you build a support team around you, which includes a Mentor and External Coach.

It is all about your mindset

I could share any number of productivity tools and apps, but at the end of the day being productive and efficient is all about your mindset and how you approach your working day, week and month. After all, no phone app or to-do list tool can actually make you physically use them.

To help you get into the right mindset to create the time to progress your career along Partner Track, consider these questions:

- What more could I do on my Partner Track Plan by being more organised?
- What would my family, friends and the people around me gain by me being more organised?
- How many business development opportunities am I not getting to by not managing my time more effectively?
- How much quicker would I get through Partner Track if I were able to fit more into less time?

Using a default diary

How to find the time to do business development when you have a full caseload is one of the typical challenges anyone on Partner Track faces. One of the productivity tools I suggest to people on Partner Track is to use a default diary.

This is where you have a standard daily, weekly, monthly, quarterly routine, which is timetabled permanently into your diary. This makes sure that the important (but often non-urgent) stuff, such as business development and meetings with your team members happen. For example, one of our clients used to block out every Friday morning as her time to work on her Partner Track Plan. See Diagram 2.1 for how she set up her default diary.

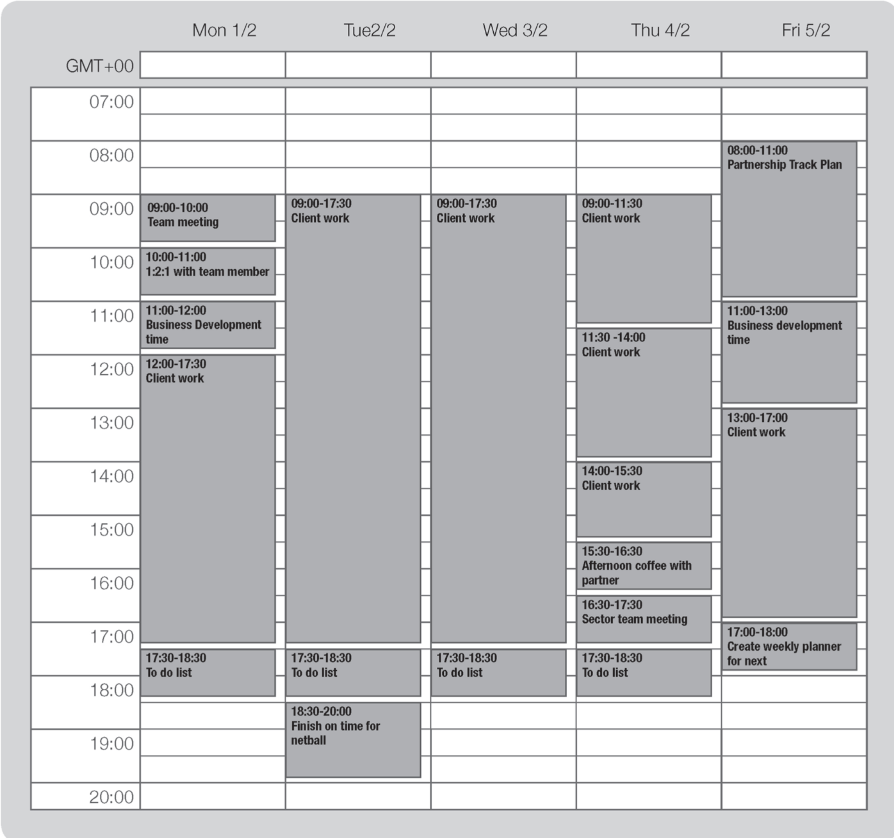

Diagram 2.1: Example of a default calendar

Prioritise, prioritise, prioritise

When you are on Partner Track it can seem like everything is important AND urgent. After all you still have client work to do, as well as a raft of extra responsibilities such as supervision, networking and building your profile with your partners. This means that you need to become ruthless at prioritising. I.e. being focused on the right thing to do now as well as the important stuff in the future. Using a Weekly Planner to help you timetable into your diary your priority tasks will help you never lose sight of what you really need to achieve in a week.

WEEKLY PLANNER	Week no: 47		From: November 30th		To: December 6th	
Mon	Tue	Wed	Thurs	Fri	Sat	Sun
Business development, networking, people management and client service actions to complete						
Appraisal for Suzy			Finish reviewing audit report for HGR audit	Keeping-in-touch calls		
Partnership Track Plan tasks to complete						
	Meeting with my mentor		Meeting with Head of finance to go through the partnership annual reports	Partnership Track Plan review		
Any other actions to complete						
Departmental monthly meetings						

Your 3 Critical Results this Week - What You *Must* Achieve this Week	Done
Meeting with my mentor to discuss the 1st draft of my marketing plan for next quarter	
Evening out with my wife for date night	
Finish reviewing audit report for HGR audit	

Objectives for the month (taken from Partnership Track Plan)	Done
Finalise my marketing plan for the next quarter	
Supervise my managers to finish the audit reports due this month	
Agree on date nights and family activities with my wife	
Agree sector marketing plan for the environmental sector team	

Diagram 2.2: Your Weekly Planner, with critical results identified for the week

Use the Career Kitbag's Weekly Planner template to help keep you focused on what you have to achieve each week

How to stop procrastination from sabotaging your success

Everyone from time to time will suffer from procrastination. Unfortunately procrastination is one of the ways that we actually sabotage our own success and potentially our partnership ambitions. For whatever reason, when we start to procrastinate, we put barriers and obstacles in the way of what we need to do. Dr Ferrari found that there are three types of procrastinators:

- Avoiders, who may be avoiding the task because of fear of failure, fear of success or because they are worried about what other people think

- Decisional procrastinators who struggle to make a decision, often because then they don't need to take responsibility for the outcome of the decision
- Thrill-seekers who are energised by a last minute rush and panic.

Here are 10 ways in which you can stop procrastinating:

- Identify why you are procrastinating. What can you do to overcome this reason?
- Be brave and just take the decision. Not taking a decision can very quickly become a mistake on our part.
- Break the task up in smaller and more manageable pieces
- Schedule some time with your External Coach or Mentor to explore why you are procrastinating
- Use and complete your To Do list, e.g. your weekly planner
- Set yourself deadlines which you must hit
- Get the difficult stuff out of the way first
- Aim to avoid striving for perfection
- Delegate or outsource
- Set aside an hour where you turn off all distractions and power through your To Do list.

Stopping e-mail dominating your day

One of the features of being on Partner Track is often an over-flowing inbox. There are all the emails you are cc'ed on from your team, the social media notifications, the circulated reports as well as the essential client emails to tackle. Here are 6 ways in which you can tame your inbox:

- Set times of the day when you will process your email
- Use email rules to do some of the email processing for you, e.g. setting up a folder called "invoices to process"

- Use email flags to make sure you don't lose an important email
- Unsubscribe from all unnecessary newsletters
- Get into the habit of actioning, filing or deleting an email immediately
- Give yourself a personal limit for the maximum amount of email your inbox can contain.

Minimising your interruptions and distractions

Have you ever got to the end of the day and just felt you couldn't get anything done because of phone calls, people stopping by or being messaged on the firm's instant chat system? Being able to guard and protect your quality thinking and working time is essential for anyone on Partner Track. Unfortunately the nature of working with clients and leading assignments means that interruptions and distractions are something that needs to be actively managed.

Here are some ideas to stop interruptions destroying your productivity e.g.

- If it's urgent and important, deal with it straight away
- Try standing up when the other person comes towards you. This will naturally shorten any disruption as the other person can't sit down and get comfortable.
- If the interruption has come at a bad time, reschedule it.
- Turn off the firm's instant messaging system and any social media or email notifications
- If you have your own office, shut your door when you don't want to be interrupted
- Save up your phone calls or follow up conversations so you can do them in a block of time
- Tell people when it is a good time to contact you
- If your firm allows you to do this, switch your phone onto voicemail or divert to your secretary.

Stopping meetings from eating up your day

Meetings are a necessary evil for someone in professional services. When you are on Partner Track there will always be someone who wants you to attend a meeting. This could be a staff, project related or committee meeting, a catch-up or a 'good' networking opportunity. As with all these things, balance is key. Yes, you want to make sure that your face is seen in the right places (see Chapter 10) but you still need to get the day job done. Only you can decide what meetings you need to actually attend. The best way to do this is look at your Goals, Milestones and Objectives. Will being present at this meeting help you with these? Or is it a pleasant distraction, which you can absent yourself from?

Delegation

> *If it can be delegated, it must be. Never work on something that someone less experienced than you can do – your career will be on hold and you'll become more and more obsolete with each passing day.*
>
> *DAVID MAISTER*

If you are going to free up your time to build your business and personal case, then you need to be able to delegate to a more junior and cheaper member of the firm. For example, the next time you are at a client meeting see if you can take a junior member of the team with you. The junior gets valuable exposure to a client meeting, and you get someone to take notes and complete the attendance note from the meeting.

If we don't have competent people to delegate to, then very often we will take the view that it's quicker and simpler to keep the work rather than delegate it down. In fact, in the last week alone two of my clients have stated that a lack of junior staff to delegate to will hamper their attempts to build their Business Case.

Whilst you may not always have access to competent junior staff to assist you on your client work or instructions, most of us have access to support staff. For example, it takes time to make sure you speak to the right people in your network at the right time. Why not ask your secretary or team PA to support you to get all your networking meetings in the diary?

Don't always assume that what you delegate will be done to your personal standard or right first time, particularly if you are delegating to a very inexperienced member of the team. Therefore, make sure that you allow enough time for any necessary briefing, rework or review time.

Summary

If you are going to successfully build your Business Case and Personal Case for partnership you will need to carve out time to learn new skills, go out and win your own work and take on new responsibilities. To create the time needed, you will need to identify ways in which you can become more productive by:

- Delegating more effectively
- Being more disciplined about what you will stop doing
- Learning to say "no"
- Stopping procrastination
- Having a default calendar
- Minimising your interruptions and distractions

Action Points

1. At the beginning of each week, ask yourself, *What are the 3 most important results that I must achieve this week that will make a difference to my Partner Track Plan and my team's performance*? Work out how you are going to achieve them and add these tasks to your Weekly Planner.
2. Start using your Weekly Planner.
3. Find an opportunity every day to practice your delegation skills.
4. If you struggle to say "no" to requests, have a go at gracefully declining the tasks or opportunities that come your way, which you should not be doing.
5. Use your firm's time recording system to review how much time you are spending on your key roles and responsibilities. Can you see a pattern emerging? Are you investing time on the things that will help and progress your Business Case and Personal Case?
6. Ask your Mentor and Sponsoring Partner how they found the time to build up their Business Case and Personal Case when they were on Partner Track?
7. Introduce a default diary into your calendar to make sure that you are integrating business development and team management activities into your day job.
8. Look at your Partner Track Plan Goals, Milestones and Objectives; i.e. your rocks. When can you plan these rocks into your diary?

Further resources

BOOKS

Use these books to help you become more productive and effective at work:

- *Eat That Frog!: Get More of the Important Things Done – Today!*, Brian Tracy, ISBN 978-1444765427
- *How to be a Productivity Ninja: Worry Less, Achieve More and Love What You Do*, Graham Allcott, ISBN 978-1848316836
- *The 7 Habits of Highly Effective People*, Stephen R. Covey, ISBN 978-0684858395
- *Assertiveness at Work: A Practical Guide to Handling Awkward Situations*, Ken Back and Kate Back, ISBN 978-007711428-2
- *Getting Things Done: How to Achieve Stress-free Productivity*, David Allen, ISBN 978-0749922641
- *Organizing from the Inside Out: the Foolproof System for Organizing Your Home, Your Office and Your Life*, Julie Morgenstern, ISBN 978-0805075892

WEBSITES

- Free time management plans and templates: http://www.howtomakepartner.com
- Dr Rob Rawson's blog – The Time Management expert: http://www.timemanagement.com/blog/

3

Making sure you have all the support you need

Topics covered in this chapter:

- The importance of your support team
- How to build a strong and positive relationship with your Sponsoring Partner
- How to use your Mentor to build your Business Case and Personal Case

> *"When you run the marathon, you run against the distance, not against the other runners and not against the time.*
>
> *HAILE GEBRSELASSIE*

In the last two chapters we have been talking about how being on Partner Track is a marathon, not a sprint. Therefore, like any good long distance endurance athlete, you will need your own support team to help and support you along the way. Your support team is composed of people who are drawn from your personal, professional and family network. All the members of your support team have an important role to play in helping you achieve your aim of making partner and living to tell the tale. However, the two most important members of your support team whilst you are on Partner Track are your Mentor and your Sponsoring Partner.

This chapter provides the information that you need to build the right support team around you, in particular helping you leverage your relationship with your Mentor.

The importance of your support team

As I have mentioned before, being on Partner Track is like having two jobs. You can't successfully do two jobs in isolation. Your support team is there to help and guide you, take some of the strain, whilst keeping you fresh and energised for the journey ahead. They will be at your side throughout your journey on Partner Track.

Who should be in your support team?

Of course the exact make up of a support team will be different for everyone. However, an effective support team when you are on Partner Track is likely to have people playing five different types of roles.

Mentor: Your Mentor is someone in your firm who is more experienced, can act as a sounding board and provide objective guidance and feedback. When you are on Partner Track they play a vital role in helping you take the step up to partner. The right Mentor will:

- Help grow your profile within the partnership group, particularly in areas you have had little previous contact with
- Give you the insider knowledge on who you need to spend time with to strengthen your Personal Case
- Become one of your best advocates when the partners meet to discuss who should be made up to partner.

Sponsoring Partner: This person is normally the Head of your department or practice area. They are typically the person who will decide whether you are ready or not to go on Partner Track and be recommended for partnership. If you don't have their blessing to go for partnership then it will be pretty much nigh on impossible to make partner at your firm. You normally get no say in who will be your Sponsoring Partner. A Sponsoring Partner can act in a pretty similar role to your Mentor, for example help to grow your profile, be your best advocate, help you secure the coaching and personal development you need and give you the insider knowledge. In some firms your Sponsoring Partner is the person who will write and pitch your Business Case to the partners.

If you are aiming to get to partner as a lateral hire, it will be your Sponsoring Partner who will be the person championing your cause within the firm.

External Coach: There are many benefits to having your own executive or career coach who is independent from your firm, although your firm may be paying for their time. Your own coach helps you to take time out from the hurly-burly of your work life to focus on what really matters to you. They will also work with you in acquiring the key skills and knowledge required to make partner. It can be a very lonely time on Partner Track because you are not yet a partner, but no longer 'one of the team'. An independent coach can often be the only person you can totally confide in without fear of risking your progression to partner.

Family: Having a supportive and happy home life is important. It is very difficult to truly excel at work if you are having long-term problems with your family life.

Friends inside of work: By going for partner in your firm you are committing the next 5+ years of your life to this firm. Therefore, if you are going to be your best at work you need to have colleagues whom you like, trust, respect and think of as friends. If you find that you have very few friends at work, then this is a sign that you may need to seriously consider moving firms.

How to build a strong and positive relationship with your Sponsoring Partner

As your Sponsoring Partner is the person who recommends you for partnership, this is a crucial member of your support team. If this relationship has broken down or is weak your partnership ambitions may be effectively blocked at your firm.

Here are some tips to strengthen this core relationship:

Be aware of their personal agendas

Every partner in a firm is constantly juggling multiple agendas; their personal agenda, the firm's agenda, other partners' agendas and their team members' agendas. Not all of these agendas may be aligned! Therefore, you need to find out what is motivating them and what behind-the-scenes stress or dramas they may be managing in the background. The more you can align your agenda with what they want and need, the easier it will be to have their backing.

Communicate, communicate, communicate

Far too many professionals worry about being completely open and honest about their career aspirations and concerns with their Sponsoring Partner. Generally the more open you can be, the easier it is for your Sponsoring Partner to fully support you and help to remove the road blocks in your way. Aim to sit down with your Sponsoring Partner at least quarterly to have a chat about how the both of you think things are going. This doesn't need to be a long chat; 10 minutes may be all it takes.

Know how to manage them

Managing upwards is an important skill within a partnership. Make sure you know how they like to work, take decisions and receive information. Then ensure that you flex your style so that you communicate to them in their preferred style and give them information in a format that suits them.

Find ways to help them

Having a very supportive team member who you can rely on, just makes a team leader's life so much easier. Your aim is to see if you can become that team member for your Sponsoring Partner. How can you find small or big ways to help them?

How does a Mentor help you build your Business and Personal Case?

The right Mentor for you will become your secret weapon whilst you are on Partner Track. Of course, the right person will undertake the normal sort of roles that you can expect from any mentoring relationship, e.g.

- Critical friend, telling the mentee the uncomfortable truth that only a true friend can
- Sounding board, giving the mentee the chance to try out ideas and approaches in a safe environment
- Role model, providing an example from which the mentee can learn
- Coach, helping a mentee to acquire new skills and abilities
- Networker, helping a mentee develop the connections they need to gain experience, get a job, promotion and so on
- Facilitator, helping set and achieve objectives.

However, there are four key ways in which you can really leverage your relationship with your Mentor.

Help grow your profile within the partnership group, particularly in areas you have had little previous contact with

In an ideal world you would have been growing your profile across the firm from the early days of your career. However, you may be a senior lateral hire or just not socialised or worked with many of the partners outside of your own service line or sector team. This is where a mentor who is external to your practice area can help you to build your profile. Just by associating with them and being seen with them, your profile will grow outside of your own department; essential for when it comes to partnership vote time.

Give you the insider knowledge on who you need to spend time with to strengthen your Personal Case

Not everyone is created equal, and this is spot on when it comes to the partners in your firm. There are always going to be some partners that are more influential than others. Your Mentor can help you prioritise who you *must* have on your side and how to gain their trust, respect and advocacy.

Become one of your best advocates when the partners meet to discuss who should be made up to partner.

Most of the conversations about who is going to be ready for partnership takes place behind closed doors, either formally or informally between partners. The more advocates you have the more chance that you will be the person who gets partnership. One very strong influencer who is an advocate for you may be what you need to convince other partners that you are ready for partnership.

Share how they tackled the many challenges of being on Partner Track

As I've previously stated many times in this book, being on Partner Track is the hardest career transition you will do within the professions. Your Mentor will be a great source of pragmatic advice on how they coped, and the strategies they used to overcome the hurdles that face you. Because they have been in your position but also know what is really important for their fellow partners, they are ideally placed to help you prioritise where you should be spending your time. For example, the Mentor of one of my coaching clients was able to reassure her exactly what the rest of the partnership would want to see her doing to put her forward for partnership.

How to decide on who should be your Mentor

The best Mentor for you when you are on Partner Track will be someone who:

- Is external to your practice area
- Has the time to spend with you
- Is seen and known to be highly influential within the partnership
- You respect and like, and this feeling is mutual.

Case Study:
Faye

Faye's firm had recently merged in the last 2 years. As a litigator she had strong relationships with people in her sector teams who sent her work. However, she wasn't widely known in the firm's core area of property or the partners from the other part of the merged firm. One of her personal development areas was to develop strong Referral Networks. As a result she chose a mentor from the firm's commercial property team who was known for being very good at developing Referral Networks. She did this for three reasons: it helped build her profile in property, she got to know partners from the other side of the merged firm, and she was able to learn how to create strong Referral Networks from someone who had been there and done that.

How to get the most from your Mentor

It is up to you to drive the relationship with your Mentor. To get the most out of this relationship:

- Set expectations from the outset of your relationship about what you both expect and want from each other
- Be honest with yourself and your Mentor, particularly if the relationship isn't progressing as you would like
- Prepare for your sessions with your Mentor and don't be afraid to have your own ideas and views
- Get dates diarised for your meetings in advance
- Do your action points from any meeting with your Mentor
- Agree with each other in what circumstances it is OK to postpone a meeting between the two of you.

Use the Career Kitbag's 'Guide to getting the most out of your relationship with your mentor' to help set up an effective relationship with your mentor. The guide includes a mentor/mentee contract, which will help you set the right expectations between the two of you.

Summary

Having your own support team who help and cheer you along the way is vital if you are going to make it successfully through Partner Track to partner. The two most important members of your team are your Sponsoring Partner and your Mentor.

Your Sponsoring Partner is normally chosen for you and very often the head of your practice area. If you don't have a strong relationship with your Sponsoring Partner, then you are unlikely to make partner in your firm.

A good mentor will play many roles for you, but ultimately will be someone who you respect and like. They will become, alongside your Sponsoring Partner, your best advocate for you within the partnership group. Make sure you choose a mentor who is in a different practice area to you and has strengths or a skill set which you would like to gain.

Action Points

1. Identify an influential partner outside of your practice area who you have good rapport with, and ask them to be your Mentor. Make sure you present a case on what you want, what is motivating you to get to partner, and why you have chosen that person to be your Mentor.
2. Look for role models within and outside of your firm, who are recognised leaders in their field. Do some research to find out how they have achieved their success, what you can

learn from their experience, and how this can help your own career.

3. Look around you, who is in your support team? Who is missing from the team? What action could you take today to build stronger relationships between you and your support team?
4. Draw a diagram showing the members of your support team. Make a few notes under each name reminding you of what their strengths are in their support role.
5. Get into the habit of storing up examples and scenarios that you would appreciate guidance on to discuss with your Mentor.

Further Resources

Websites

- *How to make partner* includes articles on how to get the best out of your relationship with your Mentor: http://www.howtomakepartner.com

4

Keeping healthy for your journey on Partner Track

Topics covered in this chapter:

- The signs of stress and how to avoid burnout
- How to pace yourself to avoid becoming overwhelmed

> *"Life ain't no dress rehearsal.*
>
> *BERNIE MAC*

Being on Partner Track is a good sign that your long journey to make partner is coming to its concluding stages. However, you've just started the hardest part of your journey. This means you will need to stay healthy, both mentally and physically, to give yourself the optimum chance of making partner. Sadly many talented professionals never make it to partnership, because their body, and subsequent health, is unable to handle the lifestyle that the commitment to making partner so often demands.

This chapter gives your strategies to avoid burnout and becoming overwhelmed when you are on Partner Track.

The common signs of stress and how to avoid burnout

> *"Stress is still not something lawyers are comfortable talking about.*
>
> *CATRIN MILLS*[1]

1 *Effective Stress Management Techniques for Lawyers*, Catrin Mills, ISBN 978-1907787089

Common signs of stress include:

- Constantly feeling angry or getting angry easily
- Feeling down or depressed, often without knowing why
- Always feeling anxious, nervous, or constantly worried
- Either feeling hungry all the time, or having no appetite at all
- Feeling constantly overwhelmed
- Crying, or feeling like crying, a lot of the time
- Feeling constantly tired, and having trouble sleeping
- Not being able to concentrate
- Having to use alcohol or recreational drugs to be able to relax or wind down at the end of the day
- Poor skin; e.g. eczema, acne
- Hormonal swings or imbalances, particularly for females
- Digestive discomfort, for example irritable bowel syndrome and heartburn.

Note: If you find that you can personally relate to three or more of the signs on this list, then you need to seek professional advice and take action to reduce your stress levels.

Use the Career Kitbag's Burnout Self-Assessment tool to see whether you are at risk of burning out

Everyone is different, and so the right amount of pressure for one person may be too high for another. Over time, people create coping strategies and mechanisms to be able to increase the level of pressure that they can deal with, while still maintaining peak performance and not suffering the side effects of unmanaged stress. It's when you either don't create these coping strategies and mechanisms – or when they become insufficient – that your health really starts to suffer from the effects of this unmanaged stress.

We are now going to look at what those coping strategies and mechanisms may be to reduce your stress levels and avoid burnout.

Increase your general level of activity

The human body was designed for physical activity – often walking 10km in a day to forage for food and get water. How many professionals would now be able to walk that distance every day?

Physical activity, as well as being a great stress reduction tool, is vital for our mental wellbeing and stamina. For example, just thirty minutes of brisk activity five days a week could significantly reduce your chances of having a heart attack. Let's now look in more detail how just a small shift in your level of activity helps your all-round general wellbeing and consequently enables you to maintain more periods of peak performance, regardless of the amount of pressure you are under at the time.

When you exercise, your body starts to produce serotonin. Serotonin enhances your mind and helps you clarify your thinking. This is why it often gets easier to take a decision, work out what's going on or cope with an event if you go for a walk or run. However, serotonin has even more benefits to our health. It is the precursor to melatonin, which is the chemical our body produces to help reach deep sleep. When you sleep deeply you wake up in the morning fully refreshed and ready to tackle the day. In turn, you've more energy left to do more exercise and therefore produce more serotonin, which makes you a happier and more effective person because you can think more clearly … and so on, in a virtuous circle.

Exercise after work

Our bodies come hard-wired with the *fight or flight* response, which was meant to only be triggered once or twice a week. For example, when hunting for food or being under attack from a predator. In the *fight or flight* response, a series of complex hormonal changes occurs, which prepares our body to take emergency action. Adrenaline is produced – the equivalent of giving our body a shot of rocket fuel. The only way we can dissipate this rocket fuel is to either do some activity or proactively relax. Unreleased, adrenaline will accumulate in the body. Exercising after work becomes a great way of reducing the adrenaline in your body and it will help you to switch off your mind when it is time for sleep.

Take regular holidays

Taking a break from work can give your body much needed time to rest and recuperate. If you have got into a vicious cycle where you need to keep hitting the adrenaline button just to keep going, then taking annual leave may be the only way to break the cycle. You don't actually have to go away on holiday, just ensure that you are not working and focus on spending time recharging your mental and physical batteries.

Have a life outside of work

The book *How to make partner and still have a life*[2], talks about the importance of feeding your soul. This is the concept where you spend time outside work doing stuff you genuinely enjoy and socialise with people who make you feel good about yourself. Having a meaningful and enjoyable existence outside of work will increase your resilience to cope with the extreme pressure you will be under on Partner Track.

Eat healthily and avoid food containing high levels of processed sugar

Stress and nutrition have always been linked. Foods with high nutritional value can actively help you to reduce your stress levels. The opposite is also true; there are some foods and drinks which when consumed in moderation can increase your stress levels.

Food and drinks that have been proven to trigger and aggravate stress include:

- Foods containing caffeine, e.g. coffee, chocolate, tea and energy drinks

2 *How to Make Partner and Still Have a Life*, Jo Larbie and Heather Townsend, ISBN 978-0749466558

- Fast foods and takeaways
- Alcohol
- Fizzy and sugary soft drinks.

You may find you *need* your regular dose of caffeine to get through the day at work. However, it is worth noting that caffeine is a neuro-stimulator that heightens stress. Too much stress makes you anxious. Stimulation from caffeine can increase this anxiety and reduce the quality of your sleep.

After a long hard day at work many people find it so easy to pick up a curry on the way home from work. Takeaways and junk food normally contain high levels of protein, fats and carbohydrates and low levels of vital minerals and vitamins. This combination can induce stress.

Stress causes an increase in your blood sugar levels. Eating food with high levels of processed sugar can then significantly increase these levels. Prolonged periods of time with high blood sugar levels can be a contributory factor in the development of diabetes.

Lean on your support team

In Chapter 3 we talked about the importance of your support team. Your support team is there to help you during the good times and the bad times. A conversation with your Sponsoring Partner, Mentor or External Coach may be just what you need to lower your stress levels.

How to pace yourself to avoid becoming overwhelmed

With so much that you need to do on top of the day job it is easy to become stressed when you are on Partner Track. Here are some ways of pacing yourself to avoid becoming overwhelmed:

Accept that you are in a marathon not a sprint

If you haven't already broken up your Goals to make partner into realistic Milestones, as suggested in Chapter 1, then I encourage you to do so now. As the saying goes, a journey of a thousand miles starts with a single step. It is much easier to work towards smaller short-term Milestones than aim to do everything in one go.

Case Study: Simon

Simon was facing an uphill task. He needed to go from having zero clients of his own to building a client portfolio worth £800k. It seemed like an impossible Goal. So he worked with his Coach to break down the Goal into more easily achievable Milestones. He set himself monthly objectives and metrics for his business development activity levels. After he had done this and started working towards the much smaller Milestones and Objectives, he felt far more in control and confident that he could build a partner-sized client portfolio within 2 years.

Be realistic with your time

Everyone has 24 hours in a day. If you try and cram in too much to do in one day you will soon get disillusioned and potentially give up on your aim of making it to partner. Therefore, look through your diary each week. What is realistic to achieve on your Partner Track Plan this week?

Remember it is better to be the tortoise than the hare

Everyone is on a different career path. I know it is hard to see your peers accelerating their career ahead of yours. However, the right time to make it to partner will be the right time for you personally – not when the first people in your peer group make it. It is far better to take a little longer to get something rather than not get it at all by rushing. After all, not being ready for the role of partner when you get made up to it can be a very harmful career-limiting move.

Use a Partner Track Plan to pace yourself

It can be very tempting to try and do everything now. That is the quick way to burning out. Your Partner Track Plan will be an essential tool to keep yourself focused, but allow you to pace yourself on Partner Track.

Use the Career Kitbag's Partner Track Plan to help you pace yourself and avoid burnout when you are on Partner Track.

Summary

Like any top athlete you need to make sure you are fit and healthy to successfully make the transition from senior associate/director to partner. This means you need to have created effective personal coping mechanisms and strategies to be able to handle the stress.

Commit to eating healthily and exercising regularly as a way of helping your body work at optimum levels of performance and reduce your stress levels.

Action Points

1. Look through the list of common signs of stress contained in this chapter. If you are regularly suffering from three or more of them then consult with a medical professional.
2. Consider your current workload and stress levels, and decide whether taking some annual leave might be sensible.
3. Get into the habit of switching your e-mail off when you finish work for the day.

4. If you are starting to feel overwhelmed then book some time in with someone you trust to talk through the causes of your high stress levels.
5. Start spending some of your weekly non-work time on something you enjoy that will help you to relax and unwind.
6. Plan to take a minimum of a 15-minute brisk walk or activity every day. Add this into your Weekly Planner. What opportunities do you have to do this activity with family and friends inside and outside of work?
7. Plan your meals for the next week so that you always have an easy, quick and nutritious meal after a long and tough day.
8. Ask your children, if you have them, what they would like to do with you regularly at weekends.
9. Get into the habit of having a regular date night with your partner or friends.
10. Find a form of exercise that you enjoy, such as swimming, yoga, pilates or running, and participate in this activity at least once a week. Make sure this goes into your Weekly Planner.

Further resources

BOOKS

Use these books to help explore more about building your resilience and reducing your stress levels:

- *Effective Stress Management Techniques for Lawyers*, Catrin Mills, ISBN 978-1907787089
- *Manage Yourself, Manage your Life: Vital NLP technique for personal well-being and professional success*, Ian McDermott and Ian Shircore, ISBN 978-0749919900

WEBSITES

- For more help on keeping your body working at peak performance contact Chris Williams at Momentum 4: http://www.momentum4.co.uk
- The Cognitus *destress at your desk blog* has a large amount of tips, techniques and strategies to help you reduce your stress levels at work:
  http://cognitusuk.com/blog/

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