



Developing Grace Under Fire

A case study of DPR Accountants and Advisors: staff development for now and the future

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Re-establishing a business

Situation

DPR Accountants and Advisors moved its practice to Bateman's Bay for a 12 month period of non-competitive trading after a break from previous business partnership. The firm set out to re-establish itself in Canberra, with some new team members, as well as some existing team members who moved back to Canberra. This involved setting up premises, and re-building a Canberra-based practice. The firm is a three way director-ship, with one of the primary directors looking towards retirement in about ten years.

Challenges

Zoë Routh met with the Directors and staff to discuss their current challenges.

Firm Directors shared:

"We have some amazing staff! I really want to invest in these people as they work hard, and they do a great job."

"I'm looking to retire in about ten years. I want to make sure the business is set up for long term success for me, my family, and the staff who will be its next stewards."

"I have not been this busy since 2010. I'm working harder than I ever have. We're working on capacity and staff, but in the meantime I'm flat out."

"I want to make sure my clients feel well-looked after by all of the staff, that they feel comfortable with any of our team looking after them, not just the senior directors."

"We are re-establishing in Canberra after a big change re-locating from the coast. I want to bring the team together and get us all back on the same page."

Staff Concerns:

"How do I gain credibility with clients when they are used to the experience of the business owner? I don't have the same kind of experience as them."

"How do I stay on top of work? There seems to be a constant crush of jobs. I run out of steam and sometimes little things get forgotten and I have to play catchup."

"I'm not very confident in speaking up and getting my opinions on the table."



"How do I build rapport and understanding of others? I'd like to know more about what drives people, and how to connect better with them."

The team marked their overall team synergy at somewhere between 'friendly' and 'honest' on the following team synergy scale:

Team Synergy Model

Figure 1:

	Focus	Feeling	Results	
Constructive	Unity	Synergistic	>>>>>	Respond COURAGE
	Cohesion	Engaged	>>>>	
	COLLABORATION	HONEST	>>>	
Destructive	Silos	Friendly	>>	React FEAR
	Territory	Civil	>	
	Survival	Dysfunctional	.	

These are the key stages of team engagement and performance. The starting point of improvement is identifying where the team currently sits.



Summary of Desired Results

After meeting with the directors and staff, we outlined the following key results:

Staff

- The staff are focused and meeting deadlines.
- The staff feel supported.
- The staff feel like they are part of a great team.
- The staff handle difficult conversations with respect and grace.
- The staff feel comfortable talking to clients.

Clients

- Issues that clients have are resolved quickly and effectively.
- Clients are delighted by the team's service.

Team

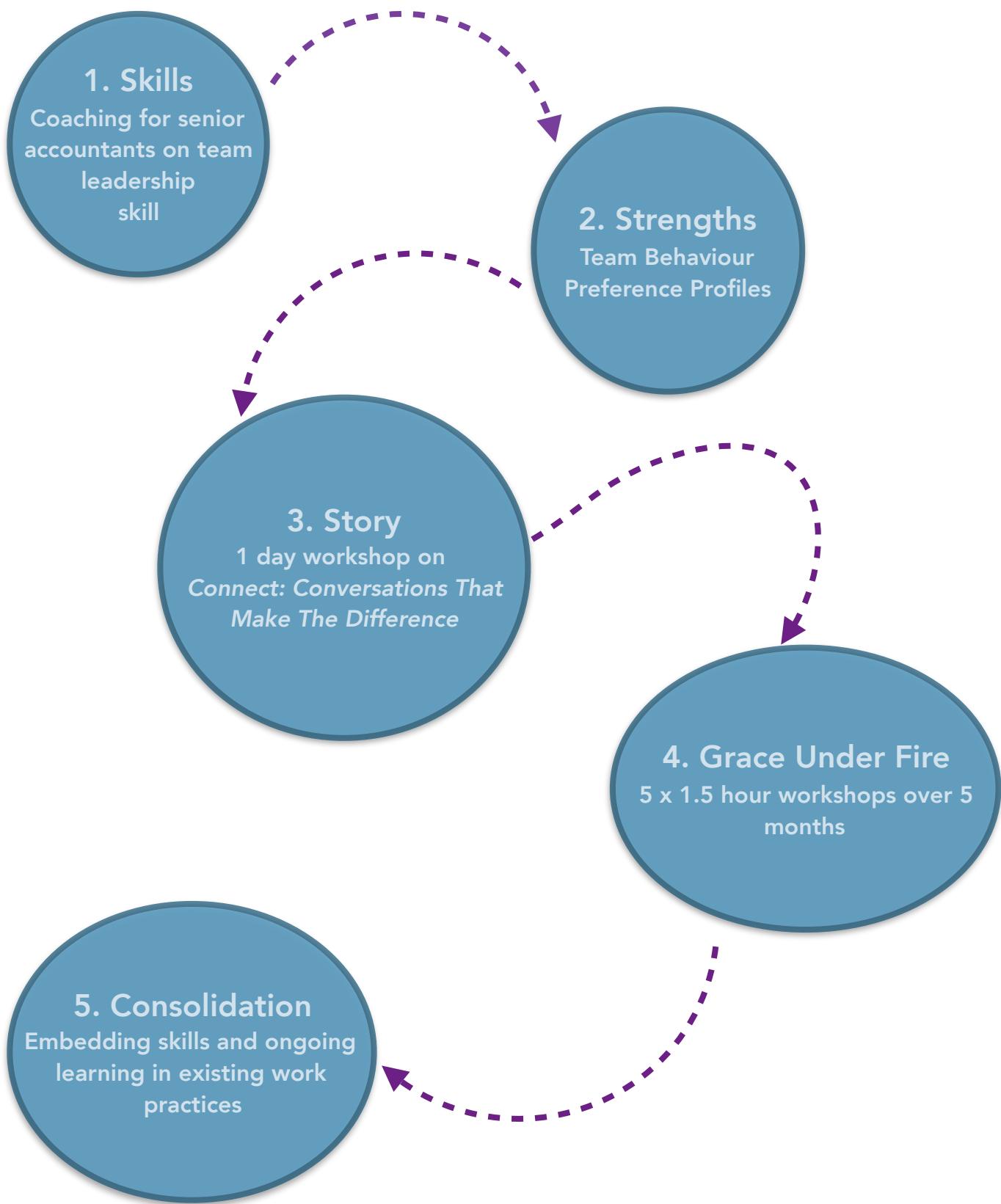
- The team has fun and enjoys working together.

Solutions

1. Senior accountants undertook a six month, one to one, Lead Your Team program coaching and training program.
2. The senior accounting team and directors undertook a behaviour preference profiling exercise and half day workshop.
3. The senior accounting team and directors undertook a one-day workshop on how to have the conversations that make a difference.
4. The team undertook a monthly 1.5 hours workshop series called Grace Under Fire over a period of five months.
5. The learning and tools were consolidated by embedding new rituals and strategies in existing processes.



Figure 2: The Development Plan for the DPR Team





Results

Directors

"The team has been more relaxed with each other. These sessions have been good opportunity for us all to stop and connect with one another and see how we are all doing."

"I am better able to recognise outstanding leaders and learn from their approaches, e.g Brendon Bolton."

"I've observed more team harmony and personal development of team members through honest and effective inter-team communication and engagement."

"It has helped my personal leadership and composure in tense discussions with clients and at client boardroom meetings."

Staff

"I am more confident in speaking up. I've been standing my ground."

"I've handled some pretty tough conversations without being a bulldozer. This was one of my main objectives."

"I keep reminding myself, "Cool head, warm heart, and safe hands." It keeps me calm and focused and engaging better. It's helping me with personal family life challenges as well. I'm a better leader and person for it."

"I've been more aware of my impact, and focused more on engaging better. I believe people are seeing me as more friendly and interested in them."

"I'm definitely speaking up more and sharing more. I am feeling more comfortable here with my work and with my colleagues."

Clients

"I've received some favourable and comments from clients about the increase of service levels from our senior accountants."



Conclusion

The various components of the program delivered over a six month period allowed the team to focus on specific interpersonal skills, and practice them. The regular review kept them front of mind, and helped many to adopt new behaviours and habits.

The team spirit started to build towards 'Engagement' on the Team Synergy Model as they learned more about each other, shared their challenges and insights, and enjoyed time out of regular office work to focus on significant personal and professional development skills.

The clients are the key beneficiaries of this work. The DPR team is more focused, more confident, and better able to handle difficult situations. They are learning more about their clients and what is most important to them. This has resulted in better, more friendly, and more timely service and interaction with the DPR clients.

The directors are more confident in the team and positive about the firm's future stewardship.

When we develop the people skills of technical experts, the capacity of the firm to engage, collaborate, and innovate increases.

The benefit to the firm's clients are a more attentive, more empathetic, more astute and patient cohort to support them in their own business success.

The benefit to the firm's directors are the assurance of a competent, capable, and reliable senior team who can lead the firm in to the future.



Relevance For You

Self Assessment

- Are you thinking about succession planning in your firm?
- Do you have high potential team members who are good candidates for higher management and leadership duties?
- Is your team strong on technical skills, but needs some work on people skills?
- Do your clients lean too much on you and are reluctant to go to your junior team members?
- Do you spend a lot of time dealing with staff issues?
- Is your team at or below the 'honest' level on the Team Synergy scale?
- Do you want your firm to last and continue to thrive beyond beyond your direct involvement?

If you said 'yes' to any of the above, then it is possible:

- The future and security of your business may be at risk.
- Your reputation with your clients may be at risk.
- You are missing out on valuable team energy and ideas.
- You are losing time, money, and energy with staff turnover and team conflict.
- You have a huge opportunity to harness the talent and enthusiasm of all team members.
- You have a huge opportunity to craft your long-term business legacy for you, your family, your colleagues, and your clients.

If you'd like to explore how to hone your legacy, double your influence, and save your retirement plan, then let's talk.



Recommendations

WHAT PEOPLE SAY

"The Change and Corporate Culture Workshop was right on the mark: fun, engaging and gave our staff specific tips on how to approach and deal with change. I would highly recommend Zoë as a presenter and facilitator."

- Juliette Ford, Director, Farrar Gesini Dunn

"I have worked with Zoë first at the TRAILblazers course at the Australian Rural Leadership Foundation and then as a coach. I have found both her coaching and resources, which have a whole of person approach, extremely helpful."

- Professor Andy Vann, Vice Chancellor, Charles Sturt University

"Zoe is my 'go to' person whenever I need some leadership direction. Zoe has coached and guided me through personal and business challenges. She uses her caring nature to guide with intuition and understanding in a non judgmental way. I always feel totally safe confiding in Zoe, as I trust her. Her leadership skills have really assisted my confidence and my ability to lead my own team."

- Claire Connelly, Owner, Papercut Pty Ltd

Clients

THESE INCLUDE, AMONGST OTHERS:

University of Canberra
Australian Indigenous Leadership Centre
Australian Pork Limited
Western Australian Fisheries Industry Council
Cotton Research and Development Corporation
DPR Accountants and Advisers
Lifeline
CARE Australia
GIO
National Association of Women In Construction
ACT Department of Environment



About the author

Zoë Routh



Zoë Routh is a leadership expert who has worked with individuals teams internationally and in Australia since 1987. She is passionate about helping leaders and teams thrive together, especially through times of volatile change. She believes that connectivity in teams, combined with change literacy, will create business resilience.

Zoë hails from Canada and has worked with individuals and teams internationally and in Australia since 1987.

With over 30 years experience, facilitating leadership programs in the wilderness as well as in the classroom, she has published *"Composure: How Centered Leaders Make the Biggest Impact"*. She is the author of the upcoming book *"Choose - How to lead in moments that matter most."*

Zoë is an outdoor adventurist and enjoys telemark skiing, has run 6 marathons, is a one-time belly-dancer, and loves hiking in the high country. She is married to a gorgeous Aussie and is mother to 6 garden-wrecking chooks.

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