



## PATHWAYS TO PARTNERSHIP & DIRECTORSHIP

Fast-tracking a business owner mindset



**POD's** program of effective and adaptable training develops new skills to help senior professionals transform themselves into effective leaders and financially responsible business owners.

# THE **POD** CONSULTANCY

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## Position your Senior Professionals for Success

As individuals rise through the ranks of an organisation, they must translate their skills and abilities from a senior professional to a joint business owner without losing the qualities that make them high performers.

Business owners need business acumen. They require the technical capability and knowledge to manage risk, maintain financial judgement, think strategically, communicate effectively and lead others. To become successful partners and directors in the future, senior professionals must close the skills gap now.

POD's program of effective and adaptable training develops new skills and helps senior professionals transform themselves into effective leaders and financially responsible business owners.

### The POD Pathways Program

**Over 12 to 18 months, the 'Pathways to Partnership & Directorship' program delivers:**

- » A personal development pathway to success, tailored to participant's needs
- » An enhanced skill set that is based on improved general business acumen and understanding
- » Opportunities to develop and accelerate SMART goal setting
- » New or updated leadership and people-management skills
- » Enhanced communications skills based on an understanding of different audiences, circumstances and modes of communication
- » Performance enhancing techniques that allow senior professionals to blend technical and 'soft' skills
- » Improving capabilities and successful strategies for business development

**We are able to develop and deliver this program on a standalone basis or in conjunction with in-house human resources, Employee Value Proposition (EVP) and training teams:**

- » We work with each senior professional at their own pace in one-to-one coaching sessions
- » We leverage the knowledge within an organisation through peer group training and workshops
- » We provide ongoing business coaching to enhance understanding and self-awareness



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## Succession planning is critical for organisational effectiveness

Do you hire or develop your future partners and directors? The performance of these individuals can determine whether your organisation succeeds or fails. They also shape and influence organisational culture with the behaviours they display and the language they use.

Moving from an employee mindset to a joint business owner mindset requires a shift in thinking and behaviours in at least four key areas:



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### Strategic thinking and managing risk

- » Do your future partners and directors already possess the required business acumen to think strategically?
- » Do they know the organisation's corporate strategic plan, vision, values, purpose and key objectives?
- » Do they understand what it takes to create a culture of excellence?
- » What systems and processes are they using to share knowledge and track and analyse precedents? Are they efficient?

### Building new business and managing clients

- » Client relationship management (CRM) is critical; how effective are your future partners and directors key account management skills?
- » Do you help individuals with reputation development, profile building and personal branding?
- » Are you happy with the level of professionalism among your senior partners?
- » Are they able to manage internal and external relationships effectively?
- » Can your senior professionals deliver productive client reviews and project briefs?
- » How successful are they at cross-selling key services within your organisation?

### Financial management and governance

- » How will your senior executives shift from a focus on short term billable hours to a long term organisational profitability perspective?
- » Profit & Loss, Balance Sheet and Cash Flow: do your senior professionals know how they impact on each other?
- » How will these individuals learn about the following unless they are shown?
  - Work in Progress (WIP)
  - Utilisation
  - Lock-up Days
  - Write-offs
  - Turnover
  - Profit Margins
  - Cost Controls
  - Return on Investment (ROI)
  - Scoping & Pricing
  - The importance of forecasting

### Leadership of self and others

- » How effective are leadership communication skills within your organisation?
- » How well will your senior leaders motivate themselves and those around them?
- » How will these individuals build a collaborative team around them?
- » How will they develop influencing skills?
- » How skilled are your senior professionals at giving and receiving feedback?
- » Do they know about stress management for themselves or for their team?
- » Can your senior leaders manage conflict and do they know how to conduct difficult conversations?
- » Can they delegate effectively?
- » What systems and processes are they using to improve their time management and efficiency?
- » Do your current leaders have highly developed listening skills?

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## Pathways to Partnership & Directorship

Growing talent from within requires the development of skills across strategy, finance, risk management, leadership, client management, and systems and processes.

As individuals rise through the ranks of an organisation, they must translate their skills and abilities from a manager to a joint business owner.

Aptitude for these areas is often expected without providing the appropriate support through training and development.

Equip people to take on the challenge of transition and fast track their success as future joint business owners.

POD's 'Pathways to Partnership & Directorship' program will enable your senior professionals to make the transition into high performing leaders.

The POD Consultancy brings experience and skills into your organisation and assists your in-house training teams in providing successful outcomes.

Call us today to discuss the needs of your organisation.

### Senior Team, Managers, Partners & Directors

- » Strategic Business Planning - Advanced
- » Business Acumen (Business owner mindset)
- » Leadership of self and others
- » Financial Skills (Balance Sheet, Profit & Loss, Cash Flow, Ratios, Managed Fees, Utilisation)
- » Personal Branding, Reputation and Profile Building (Internal & external)
- » Business Development / Networking / Account Planning / New Business Targeting
- » Business Funnel Management (Sales Funnel / Pipeline Management)
- » Client Relationship Management (Internal & external) - Advanced
- » Knowledge Management
- » Technical Capabilities - Advanced
- » Effective Communication (Incorporating the Click! Colours tool)

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## The Principal

Shirley Anne Fortina has broad business experience and is an accomplished communicator, facilitator, trainer and business development coach. She develops rapport easily and relates quickly to the specific outcomes you seek so you get the results you need.

With more than 23 years of international experience Shirley Anne has developed a valuable understanding of the different drivers and challenges facing professional services organisations. Shirley Anne has been exposed to many different types of systems, processes, management structures, cultures and people and can assist clients with:



- » Strategic business development planning and implementation
- » Client management and relationship building
- » Facilitation, leadership, coaching and formal training
- » Negotiation, preparation, presenting and closing of new business proposals
- » Risk management and compliance

Shirley Anne is an accredited Click! Colours trainer. Click! Colours help people identify and understand different personalities. Individuals and teams use Click! Colours tools to maximise their potential, boost relationships and improve both personal and team performance.

Shirley Anne co-authored a report called 'Strategic Internal Communications: Boosting corporate culture, productivity and profitability'. This report examines the barriers to effective communication and provides best practice tools, tips and guidance to help you deliver communications that foster a productive, engaged and profitable workforce.

## Our Clients

The POD Consultancy has a number of clients across a broad industry base:

### **Small Medium Enterprises (SME's)**

Focused facilitation for business development and strategic business planning.

### **Professional Services and Mining & Resources**

Legal, accounting, engineering and mining & resources organisations have engaged The POD Consultancy to deliver a number of tailored programs and facilitated workshops and meetings on the topics of strategy, business development and team building.

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## The POD Model

- » Keeping you and your business focused with clear vision, values and purpose
- » Using a solid foundation of effective communication to focus on your people, your clients and your organisations' outcomes
- » Embracing paradigm shifts & Kaizen (continuous improvement with small steps) approaches to people, clients, processes and finances



*People + Attitude + Skills + Process  
= Opportunities & Development*

## What makes POD different?

Our energy, commitment, enthusiasm, communication, follow up and follow through, hands on approach, flexibility, and our focus on relationships.

## Contact us today

Engage our strategic facilitation services at your next team day. Find out more about other communication services we offer.

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