Transforming Leaders Into Rainmakers

CREATING YOUR ROADMAP TO SUCCESSION

Navigating the Succession Storm

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Knowing Yourself and Your People

Helping Leaders Make it Rain

Tips for easy rainmaking

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IN THIS ISSUE: Succession Planning by Building Leaders That Make it Rain

Navigating Through the Succession Storm

We know that it is critical to advocate growth and create business development plans that produce and inspire RAINMAKERS. So what should be your primary focus in order to stay relevant as a player in your community and industry?

Building Future Leaders

What does your firm's future look like? Are you prepared to identify and groom your next group of leaders in order to keep your firm relevant and alive in the future?

Tools to Identify Leaders

RPG presents a compelling case using assessments to identify your employees' strengths, motivators and goals. The triple threat is a comprehensive approach to gleaning the best out of your staff, management and team.

Also Inside

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CEO, Ed Robinson has been helping professional service firms with growth and leadership strategies for over 20 years addressing audiences in over 30 countries. Ed takes time to thoroughly understand each client's needs to create innovative solutions and applications to each group he addresses and consults.

LIA MOTE: Ed, what do you mean by succession planning and building leaders to make it rain?

ED ROBINSON: One of the things I have been focusing on for the last three years is working with organizations and asking them what they are doing for succession planning. When I see how they are building leaders, I've noticed a couple of challenges.

Managing partners and managing directors seem to be aging, let's say over 45. I see a lot of over 50's running organizations so… fast forward 5, 8, 10 years from now. They are going to be moving out of the market place. The boomers are moving to the next level and thinking about retirement.

With that in mind I really take heed to what one of my clients in the Seattle area said, "Ed, in 8 years I want to be on my boat. The whole purpose for you being here is to find -

- 4 to 5 people that will allow me to retire in style
- People who will take over the leadership role
- Certainty that somebody is there to grow the business
- Confidence that the new leaders can grow the people as well as the revenue"

LIA: So when planning for succession as a current leader, is there a specific profile I should be looking for?

ED: This is actually a three-part answer: succession planning, building leaders and making it rain. I feel as though a leader has to not only have the attributes to build people but they also have to be able to bring in revenue. They have to be business developers or sales people to some extent. It's not just the traditional customer service focus, but rather being a proactive rainmaker and bringing in new business for the organization.

LIA: That's good. You've got leaders, you've got managers, and you've got rainmakers. Can you tell me what you use as the core to building leaders?

ED: In today's work environment there are five things that you really need to focus on as you build your culture to develop leaders.

1. Communication in general. This communication has to be ongoing. There is a recent article stating that soft skills, including communication skills, have become a critical component to people and revenue growth.
2. Project management
3. Staff development or the building of your right arm
4. Technical skills. If you are an accountant, if you're a tax professional, if you're a lawyer, if you're a banker, it's whatever those technical skills are that are necessary for you to advance the services of your organization.
5. Business development. With this rainmaking component not only can I acquire and manage the account, but I can also take good care of it and bring in new business.

How do I differentiate? I have often said, "If I go into an organization and take out the leader of that organization and let it stand on its own, can that business survive? Will there be follow-on business? Will that leader be able to go get more revenue in addition to taking care of the business that they have? " That's why I think it's mandatory that organizational leaders be able to make it rain.

LIA: I can think just in my experience how many times we have had people in positional leadership not doing what they needed to do to grow their revenue. It makes me think of Jim Collins, the author of Good to Great. He says, "You've got to have the right people on the bus." That makes me think!

So we're going from not just the leadership that's in place, but to building future leaders. Ed, how does a business owner know if they have the right people in their company who are capable of becoming "true leaders?"

ED: Excellent question, Lia. In Jim Collins' book, when he talks about having the right people on the bus he says we should make sure that they are in the right seats. I think we have a lot of people who are on the right bus but in the wrong seats! We use three tools to make sure that doesn't happen:

1. The DiSC is used to define one's behavior. This is necessary to identify an individual's strengths and leadership tendencies.
2. A Values instrument defines what motivates a person. It's a motivational assessment to find the things that will motivate the leader and push them to the next level.
3. A component called Rainmaker Attributes is a test to see if they have the characteristics to become a rainmaker in their organization.

I'm of the belief that anyone can learn the skills to not only be a better leader, but they can learn the skills to be a rainmaker. It's a matter of choice.

LIA: Ed, can you just touch on that a little bit more because I question whether or not everyone has the propensity to develop a business.

ED: You bring up an excellent point because I have heard this controversy for going on three decades and that is, "you cannot make everybody a rainmaker." I will agree with that. I will agree that everyone does not have the DNA to become a rainmaker. However, I think we weed people out of rainmaking mode before it's actually fair. One of my theories is that that becoming a rainmaker is easier than people allow it to be. The truth of the matter is there are three types of rainmakers. We explain them in this magazine.

LIA: Ed, you wrote a book called "4 Giant Steps to Leadership." Can you talk briefly about the attributes of a true leader?

ED: Yes Lia! There are four major characteristics of a true leader:

1. First it is important for a leader to empower the people under them.
2. The leader has to have a good vision for other people to follow.
3. They have to be good communicators with a compelling message so that people want to follow their vision.
4. Last but not least, they have to be a good role model. This means walking the talk so that other people think the company is a good place to be, and a good place to work.

I think we all have potential leadership ability. The people that we've encountered in our lives – good, bad or indifferent – have influenced the type of leader that we will become. I think every one of us has had some leader in their life that made us say, "When I become the leader, I'm going to do anything but be like that person." It's both the good and the bad experiences we have in life that we must leverage carefully in order to become strong and effective leaders.

Lia Mote is the CEO of L.V. Mote Consulting Group,
a company that provides executive speech coaching and
message strategies to professionals and business leaders.
Lia also speaks on marketing, communication, and vision.

Ed Robinson is the CEO of
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Navigating the Succession Storm

Has the perfect storm affected your leadership? Has it disrupted the momentum and caused those whom you believed to be your next generation of leaders to hesitate, and all together depart from that role? How relevant is your leadership team for today, tomorrow and 10 years from now? Recently we've all been hearing three things:

- The impact of the next generation effects our growth today!
- It's always important to focus on our firm's succession planning.
- We are experiencing a major shift in human capital.

The best way to navigate and fight through these treacherous gail force winds and waters while ensuring success of your business is to examine your leadership team. Whether it is your current board of directors, preferred shareholders, or partner/principal group, you must look at the makeup of your leadership team, setting aside superficial restraints such as ethnic or gender diversity. Instead, focus on age [transition] diversity and determine what percentage of your team is under the age of 45. Or better yet, what percentage of your team will, or should, be retiring in the next ten years. If the number of employees under 45 is less than 20% of the team, and the number of expected retirees is in excess of 55%, then succession planning is a major issue in your organization. Restated: if your Leadership Team is all or a majority of Baby Boomers, it's time to re-navigate your firm's long term future.

Regardless of the type of firm I am working with in helping the leadership assess their succession planning, I am amazed how many business have under-estimated the urgency of remaining relevant by navigating the current storms in order to be present and prepared for the future and its storms. Doing so requires taking on the challenge of the shift of human capital so that we are building for the future today.

Most people in leadership positions in professional service organizations are closer to retirement falling into the Baby Boomer demographic description. While perceived to be workaholics, Baby Boomers are currently positioning themselves to retire. The organizations I work with are also planning how to re-energize their leadership with well-balanced Generation X and Y'ers who will be able to cover retirement buyouts with cash infusion as well as with new clients that just so happen to be in the same age group as they are.

There is a phenomenon of generation-shifting in the workplace, making it necessary to be cognizant of looking at your "young guns" and actively developing them to take over the reins so that they can lead, mentor, bring in clients, service the existing client base and cover the retirement debt. Note also that this storm isn't going to disappear any time soon, so take a look at what your leadership team will look like in 10 years.

Consider:

- Will you have technical leaders, rainmaking leaders as well as leaders to develop others?
- Have you identified potential future leaders realizing that the three most important values for the next generation of leaders are:
  - o To Serve A Cause
  - o To Have Work/Life Balance
  - o To Have Leadership Roles that Make a Positive Impact in All Areas of Their Life

Suddenly, the question, "Have I begun to create a Future Mentoring Plan that will constantly keep my team bench full?" is a pressing question. If you have not considered or acted yet on this matter, then it's time to get started! This strategy and the actions resulting from it will position you and your entire organization to navigate through the storms of today and tomorrow.

Are You Building Leaders to "Make It Rain?"

If you were to ask the colleagues in your firm to name three companies that have attained success not only in the present time, but also successfully prepared its structure, employees and leaders for building future leadership and growth, what companies would they name? Did your firm make the list?

More than likely the list would be topped by a large corporation that is a household name. But ask yourself, "Why didn't they name our firm? Is our firm ready to grow and go successfully? Do we have a system and a plan for growing our future leaders in each of the key areas necessary to ensure the firm's smooth transition into the future?"

The truth is that most professional firms do have some type of succession plan in place, but more often than not, that plan is missing key elements in critical areas for a cohesive, functional and effective succession plan. As leaders and professionals, part of our job is to become comfortable being uncomfortable in order to prevent future failings that hinder growth for our firm.

The five critical areas where professional firms must have a strong foundation now, and for the future are:

1. **Technical Skills:** The ability to master a craft through specific technical and technological skills. Once you have core technical knowledge, you must leverage it to create strategies that improve or customize the service or products your customers request.

2. **Project Management:** Do the leaders in your firm take the initiative to be responsive to clients' needs? How are you establishing teams for projects? How do you train and prepare the project leaders and the team leaders? A successful project will be congruent with the overall processes of the firm.

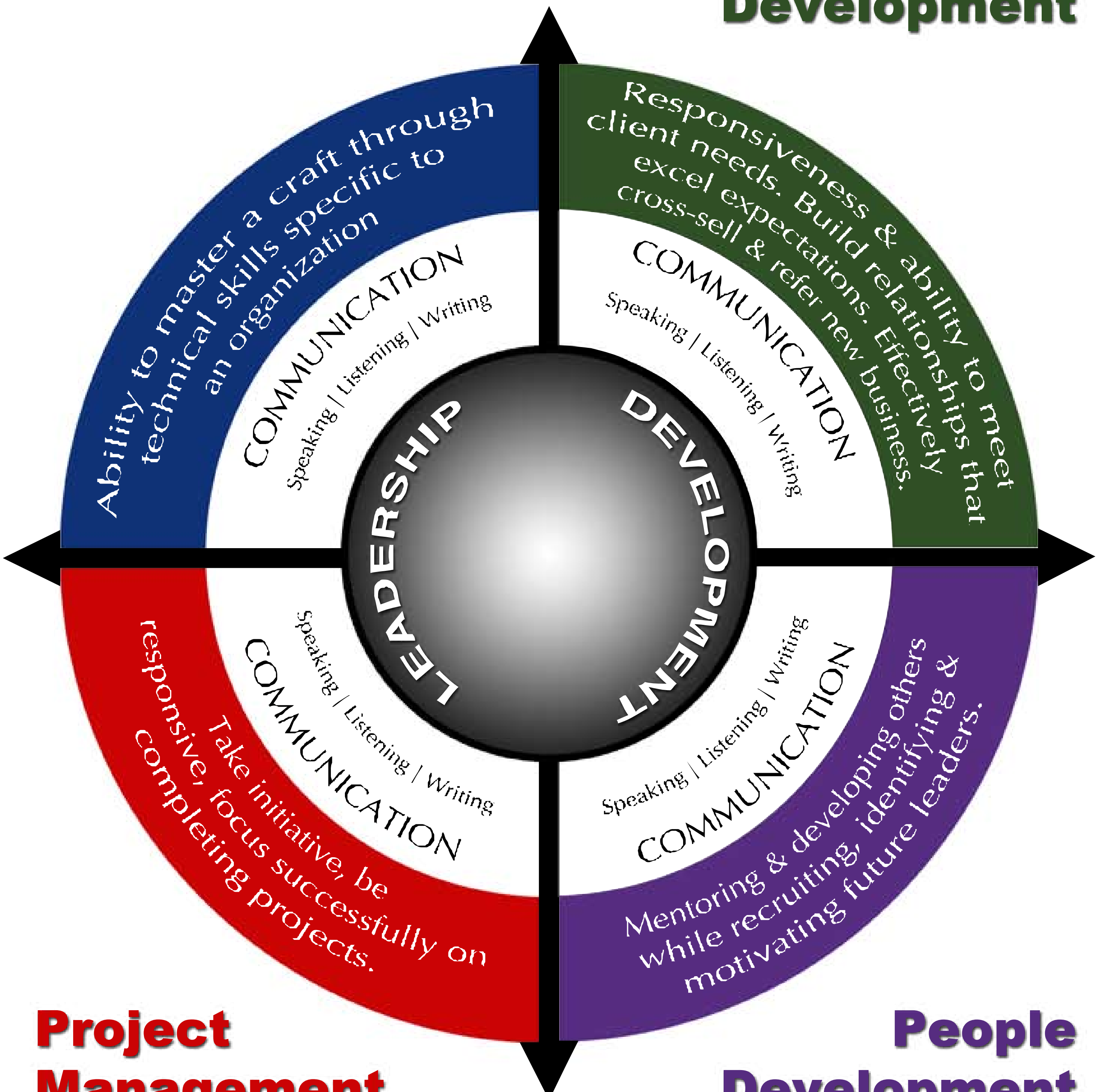
3. **Client Relations & Business Development:** The fact that your firm is growing may or may not be a direct result of strong client relations and business development system. Here the key is responsiveness and the ability to meet client needs and to build relationships that exceed expectations.

4. **People Development:** Quite often leaders focus on developing their client relationships, but may overlook or miss completely developing the very people who work in the firm. Mentoring and developing the people around you while recruiting, identifying and motivating future leaders is a key element missing in many firms.

5. **Communication:** In the end, communication is the glue that binds each of these areas together into a whole. Communication is critical for conflict resolution and solving problems in a team dynamic. It is often the catalyst in motivating your staff and teams to work better, cohesively and to feel that they are part of the team, not just working near it. Leaders who understand the power of communication and how it varies from professional to professional, are always more successful.

Communication Skills

Client Relations & Business Development



Project Management

People Development

Communication Skills

Persuasive Communication
Feedback, the Leadership Advantage
Conflict Resolution Skills
Team Problem Solving
Keys to Motivationg Staff and Team
Leadership Styles (Pros and Cons)
DiSC Behavioral Assessment

Client Relations & Business Development

Rainmaker Assessments
Rainmaking Strategies for Growth
Understanding the Firms Growth Curve
Networking on Purpose
Behavior Identification to Close More Business
Creating the Triple Win to Retain Clients
Target Growth and Goal Setting
Strategic Planning by Niche

Project Management

Simulation: Team Countdown Part I
Simulation: Team Countdown Part II
The Team Process
Time Management for Productivity and Performance
Team Effectiveness
Connection the Company's Process

People Development

Coaching for Growth
Mentoring for Results
Creating Influence and Impact
Leadership and Empowerment
Interpersonal Skills
Accountability and Responsibility
Managing the Need to Change

What is a Rainmaker?

Modern Rainmakers are high achievers, business developers, and moneymakers. Rainmakers have proven formulas for success that include technical ability, client relationship skills, persuasive ability, and individual motivation. Did you know there are three types of Rainmakers?

Key Relationship Builder

This person is proactive and well connected to the community and the industry. This Rainmaker is that Partner or Principal who brings in more than a million dollars in new business each year. We know them as the firms' key Rainmaker: the person we'd love to clone time and time again.

Tee-Up Rainmaker

This person's specialty is teeing up business for the firm's team to close. They don't necessarily bring in business, but their radar is focused on bringing in additional business and clients for the organization. They will typically bring in their mentor or supervisor to close the deal.

Back Door Rainmaker

This person is a professional who provides top notch service to existing clientele so that they don't run out the back door because they are not being properly taken care of. Because of the great service, they also generate great referrals.

All three of these Rainmakers are necessary to sustain a healthy practice. If we were to go out on a limb here, based on the firms I have worked with or reviewed, in the past decade 75% of new growth has been the result of the demise of large monolith type companies. In the field of Accountancy for instance, it was the demise of the Andersen, Sarbanes-Oxley or other mergers and acquisitions.

While events of the past provided many firms double-digit growth, most managing partners today realize that the future will need a different approach. It is critical to advocate growth and create business development plans within your firm that will produce and inspire Rainmakers. The double-digit growth of the past is now single digits. So we must advocate for growth, growth and growth.

Sales Development

The Rainmaker's Strategies for Business Growth™

Are your marketing strategies driving sales and effective client needs satisfaction? This powerful, interactive program provides client development skills to design a structured process for developing long-term, mutually beneficial client relationships in addition to learning strategies for becoming Rainmakers (client developers within their organizations).

Ed combines dynamite selling strategies with a marketing model that creates a machine for effective and proactive growth regardless of economic conditions. You will walk away with over a dozen skills, processes, and tools to grow your organization, business and sales.

"Ed is an *extraordinary speaker* and *business advisor*. He is sought after *globally* for his *speaking, coaching* and *rainmaking* techniques. Many of his clients experience a *dramatic* increase of *revenue production*."

How do successful rainmakers make it Rain?

Rainmakers must be strategic thinkers, good project managers, people developers, persuasive communicators and successful at building and maintaining client relationships. They are skilled at:

Rapport-building with potential clients

To build rapport, Rainmakers must research and know their potential client's business, as well as the opportunities and challenges that potential clients face. Then, Rainmakers must get out of the office and connect with those prospective clients. That's right, it takes time; at least 20% of a Rainmaker's time should be devoted to business development.

Asking questions of potential clients

Successful Rainmakers ask the essential questions to confirm their rapport-building research. Rainmakers know their potential client's tipping points, their needs, fears and visions for the future.

Implementing solutions for potential clients

Rainmakers demonstrate how they will add value, both short-term and long-term, for the potential client. This is done by bringing solutions to the pain points of their clients.

Negotiating a start time

Rainmakers confidently ask for their potential client's business and strive to create a long-term alliance. Experienced Rainmakers will use this RAIN principle over and over again. This system, coupled with core strengths they possess makes them successful. They know why clients hire them and they continuously develop and market these core strengths.

Go ahead, make a PEST out of yourself!

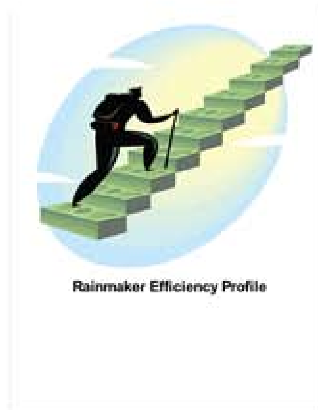
Leaders must use their core strengths through a systematic approach called "touch points." Touch points begin the rapport-building process and create connections between you and the potential buyer of those services or products. Make 16 annual touches to current and potential clients so they don't forget about you by using the PEST Approach:

Postcards should include the service provider's overview
Email could be a service overview or an article that may interest them
Snail mail examples include an article that my interest them, a service overview and a leave behind item, such as a brochure or promotional item
Telephone as a follow up to the previous touch points

Now, you are taking the initiative, doing the appropriate research, building rapport, asking meaningful questions, implementing value-add solutions, asking for the sale and getting motivated for moving forward and creating not just rain, but storms of success.

Assessment Tools for:

Motivation, Behavior & Rainmaking



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Using the TRIPLE THREAT to Identify Leaders

Your firm is on task. Your numbers look good and your team is managing client projects; the usual business cycle seems to be going well.

But, there is a sense that your team could do better. Within your success there is stagnation and your future leaders lack consistency or balance in selling key solutions and taking the initiative to bolster a relationship with clients beyond the transaction. While experts in their field, your key leaders are missing opportunities to solidify and cross-sell clients on beneficial services and solutions. They may even echo your concern and know that we "should" stay in touch with past clients, cross-sell services and products they need anyway and be more relational. But "I don't have time to follow up or I'm not good at sales, or I tried and they didn't want it" are all indicators you have a "People Problem."

When you experience this type of feedback or notice client retention and returns are weak, it's time to take a good look not at your team's expertise, but their behavior. Experts in key professional services companies tend to prefer to do what they do well: accounting, architecture, financial services, etc. They may be uncomfortable or just unsure of how to build client loyalty. Regardless of the reason, you must solve the "People Problem" to ensure exponential growth in your business and in your leaders. Assessing behavioral styles and understanding what motivates your team is a critical component of developing your leaders. That development will directly make an impact on your business numbers. Knowing their leadership style and understanding their behavior will give you insight and therefore solutions on how to develop each team member to be the most effective and motivated. Knowing yourself and your team is the egg in the cake batter: it helps your team grow and go more effectively.

You know this. You've even had your team assessed and your team member was given their results. Most firms stop here. Unless an assessment can spotlight on key behaviors and what motivates them, identifying their "style" or "personality type" may be useless alone.

You need an assessment tool mix to reveal a 3-dimensional picture of your key people. When you go 3D or from shallow to deep, you then have the right "tools" to assist them in being the best leader/professional they can. Use tools to understand behavior, functionality and their motivators, then use their unique results to empower them.

Rainmaker Performance Group administers, interprets and trains client teams using three assessment tools. We call it the shallow to deep assessment package. One assessment tool does not a "rock star" professional make. Putting someone in sales because they scored high in a sales personality profile will be disastrous if one doesn't understand what motivates them. Not all sales types are motivated just by the commission incentive. Unless you dive deeper and understand what drives that person, and fine tune your training and approach for that, you may never see the expected results from those key employees.

A strong assessment combination that I use includes: The DISC Profile – starting wide with behavior The Rainmaker Efficiency Profile - which looks at seven competencies for an Effective Sales Profile The Motivators Assessment – helps in recognizing situations where they will succeed by understating seven dimensions of motivational drivers.

By assessing the whole person, behavior, personality and motivation and then adjusting your approach in mentoring and developing your team, you will be addressing the "People Problem" in a customized manner which will provide your firm with the results you had planned more effectively, consistently and for the long-term. ◆

Tips for Easy *Rainmaking*

1. Becoming a Rainmaker in your company is the fast track to partnership and becoming a firm leader.

2. Developing clients is synonymous with sales. Making new friends is sales.

3. Sales is not just about profit and meeting goals at any expense. On the contrary, sales is about understanding what your client deems valuable and providing them with that value.

4. Regardless of what your actual title is, you are always representing your company.

5. When you can learn how to discover your potential clients' real needs, you will be more effective to both your company and your client.

6. Developing a client base involves creating long-term relationships that you can add value to. Asking questions and listening to the answers with an open mind and sincere heart are the core elements of rainmaking success.

7. To become a rainmaker, you must market your skills for success. Marketing starts with you: your intuition, ambition, technical skills, relationships, and persuasive skills.

8. Build advocates! Advocates are the people who will recommend and support you. The foundation of your marketing plan should include your advocates.

9. There is no comfort zone in sales. Sales is all about getting comfortable with change and moving on. There has never been a successful sales person who wasn't moving, ever forwad, toward bigger challenges.

10. It is up to you to anticipate your client's needs. Your goal is to become their resource. Your ability to look at issues with a fresh set of eyes each day can be invaluable to your client.

For More Tips, Please Visit www.EdSpeaks.Com

Creating a High Performance DiSC Leadership Style

by Tony Allesandra, Ph.D.

If tact is the radar of the mind, then practicing The Platinum Rule can be a valuable tune-up of your antenna.

The Platinum Rule—treating others the way they want to be treated by adapting to their personality style—can quickly make you a more sensitive, effective leader. Indeed, the Platinum Rule can have a positive effect on almost every aspect of managing. There's a different way to communicate and delegate tasks to each employee, to compliment and correct them, and motivate and counsel them. Here's how to increase your compatibility and effectiveness with all your employees.

First, recognize that your power to influence employees springs from two sources: "positional

Continued on next page...

Continued from previous page... power" and "personal power." Positional power is just what it sounds like--you're the CEO, the department head, the regional sales manager, and a certain amount of power comes from being anointed by the hierarchy.

But personal power comes from earning it, from developing it. Positional power is a starting point for influencing someone but the best you will get from your employees is compliance. Personal power turns mere compliance into real commitment, cooperation, and collaboration.

Employees have gained added clout in recent decades. Court decisions combined with more enlightened theories of management have had the effect of giving more say to the rank-and-file. In fact, it's now believed that a leader can't really lead until he or she is genuinely accepted by the led. Thus, personal power--in essence, your skill in dealing with people--is increasingly crucial to you and your organization.

In short, if you honor your employees' individuality, they'll feel like they're on a winning team and will work better for you. But you must empower them rather than just seeking power over them. You can do that by learning to listen, observe, and talk to them. And then adapting so they'll feel important. That's The Platinum Rule put into action. Do that and you'll see less tension and fewer conflicts and have a more effective, motivated workforce.

Remember, the best leader isn't someone with a particular behavioral style, or even some ideal blend of styles. Instead, the best leader is someone who realizes what a job or task requires--and then does it! That means working well with all of the personality styles in all sorts of situations.

In fact, as firms re-structure and put new emphasis on teamwork, leaders who understand behavioral styles will have a leg up. As situational leaders, they may wish to act in their natural style, using their intrinsic strengths. At other times, they may choose to adapt to others, using The Platinum Rule principles. Or, when they sense a serious clash of styles, they may wish to pick a third person to handle a certain situation.

Yet another option open to the manager is to change the work environment--say, realign a worker's duties, alter deadlines, or revamp priorities--to allow employees to play to their strengths. Most managers today agree that you can't mandate productivity.

A friend of ours, for example, employed a strong Conscientious Thinker as bookkeeper/office manager. She was terrific at that job, but when the boss had to leave the office, the Conscientious Thinker also had to answer the phone, and that's where the trouble began. Complaint after complaint piled up about the bookkeeper's brusqueness. Finally, her boss phoned in, pretending to be a customer, and was shocked how abruptly she was treated.

"I just hate it when customers call," the bookkeeper later conceded. "They interrupt what I'm doing." Though a good worker, she wasn't cut out to deal with the phone. Needless to say, the boss got somebody else to answer the phone, and everybody was happier--the boss, bookkeeper, and the customers!

For any organization to run best, it probably needs all four styles. You can't just say 'We're a sales organization, so we need all Influencing Socializers. Or 'we're an engineering outfit, so we just need results-oriented Dominant Directors and Conscientious Thinkers." You need all four types, but you need them in the right spots.

In all cases, though, you, the manager, should be very aware of your style and how it can affect others. Being conscious of the extremes of your style will allow you to become more than just a boss but a leader.

Whatever your style, being adaptable can help you to build bridges to your employees and make them feel valued. By learning to best respond to their interests and concerns, their strengths and weaknesses, you can get the most from your people as well as leave them more satisfied. ◆

**See the DiSC Styles profile assessment (available on www.EdSpeaks.com) for more information on the four personality typ es - Dominant Director, Influencing Socializer, Steady Relater, and Conscientious Thinker.*

Adapted from **PeopleSmart in Business**; for Rainmaker Performance Group by Tony Alessandra, Ph.D., and Michael J. O'Connor, Ph.D.

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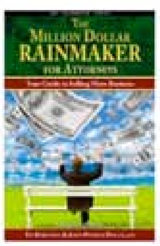

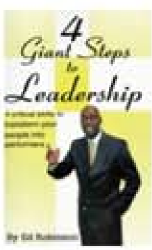

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Who is Ed "*The Rainmaker*" Robinson?

Proven Business Advisement & Sales Expertise

With over a 40% return engagement rate in his speaking career, Ed has spoken in over 30 countries addressing organizations such as KPMG, Wells Fargo, American Airlines, Blue Cross Blue Shield, HUD, Institute of Internal Auditors, MetLife, Merrill Lynch, Zurich Financial, Clear Channel/Time Warner, the US Postal Service, Deloitte, Environmental Protection Agency and NCR Corporation.

Whether the task is leadership, sales and business development training or dealing with change, Ed underscores the basics such as the attributes of professionalism, taking personal responsibility for one's circumstances and for one's career path and life. Change management and business growth are key to each of Ed's keynote presentations, seminars and workshops. By not being a victim of life's storms, and by reinvigorating passion in one's purpose, Ed teaches individuals how to dance in the rain through all challenges.

Ed Robinson transforms individuals into professionals, managers into leaders and leaders into rainmakers.

A Certified Speaking Professional and former CPA, Ed is the the author of four books and an expert in practice growth. His energetic, engaging and entertaining style is only one reason why Ed's strategies improve performance, helping individuals manage change and increase revenue regardless of economic times and challenges.

"Ed is one of the finest motivational speakers I've heard. His content is completely applicable...I always walk away with new ideas to improve myself and others."

Cindy Gabriel,
Deloitte

"I've observed Ed in a number of presentations.... He's always very enthusiastic and quite engaging. One of his strong suits is the ability to tackle difficult issues. He's very good at handling potentially conflictive situations. He works in a very supportive manner to achieve the goals of the group using a positive, proactive approach."

Karen Gallen,
SingerLewak