

## **Lowering Organizational Barriers to Improve Communication and Collaboration**

*By Richard Magid, SoundBoard Consulting Group LLC*

### **Summary**

A regional professional services firm was struggling with some of the less positive aspects of rapid business growth. The desire to maintain a “small family firm culture vs. a territorial corporate culture, generational obstacles,, and high turnover were combining to chip away at the firm’s effectiveness in the short term, as well as its long-term prospects for continued growth and stability.

### **Challenge**

How to create a more collaborative, team-oriented environment that lowered barriers among colleagues, engendered firm loyalty, and facilitated the invaluable transfer of knowledge from the current senior partners to the firm’s next generation of leaders.

### **Solution**

SoundBoard introduced the concept of a Senior Partner Roundtable, which would allow the firm’s senior management to connect with the staff by sharing their professional and personal experiences in a moderated yet unscripted forum.

### **Background**

Rapid expansion had diluted the firm’s corporate culture. The lack of a formal process for managing growth had led to a disconnection between the “founding partners” and the future generation. The result was a lack of cohesiveness in the firm’s day-to-day operations, feelings of isolation among the staff, and an unacceptable level of turnover.

### **The Challenge**

The following communication challenges facing the firm were common to many growing professional services organizations:

- No formal process to ensure the transfer of knowledge and experience from one generation to the next. For this firm, this proved especially true in the areas of practice and financial management, resource recruitment and training, and new business development.
- Barriers to effective communication and that once lowered would encourage stakeholders to embrace rather than judge each other’s management and leadership styles.
- Create and sustain a culture that encouraged cross-generational collaboration, valued diversity, and recognized that mistakes were a necessary part of business and personal growth.

### **The Solution**

Soundboard planned and executed a two-day off-site retreat that included a Senior Partner Roundtable. A SoundBoard facilitator posed carefully crafted questions that were designed to reveal the partners’ more human sides, from their backgrounds and education to hobbies, talents, and lives out of the office. Other questions focused on the partners’ opinions of their profession, aspirations for the firm, and the challenges associated with building a successful business.

"In working with the firm's senior partners, we uncovered a wealth of knowledge and experience that was not filtering down to the rest of the staff," says SoundBoard President Richard Magid. "We recommended the roundtable format as a way to break down barriers, share personal and professional experiences, and allow people to connect in ways they had never before."

### **The Results**

A senior partner stated, "The meeting prior to the facilitated roundtable created a safe environment for us to communicate. It allowed us to say things to each other that we might have never said otherwise. We were more aware of some things. The value of the roundtable experience was not in the specific information we shared, but that we humanized ourselves and showed a sense of humor."

Junior partners agreed that the exercise was a valuable first step in opening channels of communication and building trust. One commented that it demonstrated an important commitment that she hadn't felt before. "The roundtable showed a tremendous intention on the part of senior management to grow and plan for the future. Knowing that they are thinking about a legacy provides a great sense of security."

More than a year later, the roundtable exercise continues to have an impact. As the firm continues its rapid expansion, all partners remain committed to fostering a sense of inclusion and collaboration. "By actively ingraining openness and communication into our culture," says one, "we're taking the necessary steps toward creating a legacy firm."

As the growth continues in this professional services firm, the relationship with SoundBoard continues as well. The commitment on both parts to keep the momentum moving forward, to manage the growth, the culture and much more is evident.

**RICHARD MAGID**

Richard@soundboardconsulting.com