



# Transforming your business, together

Introducing PSFI

# Introduction

Thank you for this opportunity to share our credentials.

Understanding that professional and financial services firms are all different, we take an expertly nuanced view, underpinned by decades of experience to be able to work alongside leaders of professional and financial services organisations to bring transformational change.

Our clients, many of whom have been with us for more than 20 years, trust us to support them on their most complex issues around business & leadership strategies, senior people capabilities, and strategic decision-making.

We are building an independent, international, and diverse organisational development and leadership consultancy to help you access, navigate, understand and apply the most relevant leading edge thinking and research to help your business grow. We offer evidence-based thinking combined with years of hands-on experience and tailor our work and advice to suit each client's needs.

Above all we care deeply about our clients, placing the highest possible value on our relationships with you, balancing warmth and support with curiosity, insight and challenge to get to the heart of the issue so we can help you make a real and lasting improvement to your business.

We would love the opportunity to meet you, understand your challenges and share some of our recent work with you.

Kind regards, Henry



**Henry Marsden**

Managing Partner, PSFI

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Henry is the Managing Partner of PSFI. He specialises in research, coaching and mentoring and has extensive experience in the design and development of leadership programmes. He is an experienced facilitator, case study leader and presenter who is used to working with individuals and large groups.

2009



We formed as an independent firm, partly owned by The Møller Centre at Churchill College, University of Cambridge.

2018



We spun out of Møller and changed our name to PSFI to take complete control and ownership of the firm.

2022



On 1 January 2022 we became PSFI LLP to create a stable and sustainable platform for growth and to align ourselves more closely with our clients.

# Meet your international team

Our Partners and Principal Consultants have extensive experience and insight gained from working with and within professional and financial services firms around the world, many having held senior leadership roles within some of the world's top organisations.

We have a roster of over 60 client executives who we deploy on programmes in order to provide a real-world perspective to clients. We also have a carefully curated community of complementary specialists, our associates, who also have experience of working in the PSF market.



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# Meet our new Principal Consultants

Our new Principal Consultants bring with them a wealth of experience having worked at the highest level at KPMG, EY, Freshfields Bruckhaus Deringer, DLA Piper and Linklaters. We know their experience will be invaluable to clients, having held roles as Chief People Officer, Head of L&D, Chief Operating Officer and Head of Business Development.



**Louise Buckle**

Principal Consultant, PSFI

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Louise is a qualified Executive Coach with more than 20 years' experience coaching senior leaders, including Partners, CEOs, Board Directors and high potential talent, across professional services, finance, and health/medicine. At KPMG for more than 13 years, she was initially Lead Internal Coach and progressed to be EMA Head of Learning.



**Jason Haines**

Principal Consultant, PSFI

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Jason is a qualified accountant with decades of experience working in the finance and legal sectors. He has held senior roles with Andersen Worldwide, PricewaterhouseCoopers and most recently as Global CFO and Operations Director at Allen & Overy.



**Kevin Hogarth**

Principal Consultant, PSFI

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Kevin is a relationship focused expert in people, culture and organisation development. With over 30 years' executive HR experience, Kevin has held roles with Boots, Abbey National, Capital One, Freshfields, Norton Rose Fulbright, EY and most recently KPMG as the UK Chief People Officer. Kevin also has substantial NED experience currently sitting on the Boards of the Law Society and Dimensions.



**Julie Morrison**

Principal Consultant, PSFI

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Julie has over 30 years' experience working with professional services firms and is a former EY Partner. She works with Boards and senior leaders to drive change, improve partner engagement and enhance performance across sectors and geographies. She is a highly skilled communicator and action-oriented facilitator.



**Hannah Perry**

Principal Consultant, PSFI

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Hannah has over 20 years' experience of working in United Kingdom, Europe, Asia Pacific and North America. Hannah has led and implemented business transformation projects in complex matrix environments, acting as an internal trusted advisor to international law firms including DLA Piper, Jones Day, Skadden and Baker McKenzie. She specialises in integration, change and growth strategies. She is also a qualified mediator.



**Kevan Skelton**

Principal Consultant, PSFI

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Kevan has more than 25 years global experience as a senior executive, consultant and Meyler Campbell coach, leading and advising on strategic people solutions. Kevan has held roles at Deloitte and most recently as Chief Human Resources Officer at Reed Smith.



**Jonny Tapnack**

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Jonny has more than 20 years' experience as a people and leadership development consultant, and is a skilled facilitator and coach. He has previously worked in leadership roles at PwC and EY.



**Gary Reader**

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Gary is a digitally-fluent international leader, board member and advisor, working with financial services, professional services and start ups. He is skilled in developing and executing complex go-to market strategies to drive growth and capture market share.

# PSFI around the world

We have worked with clients from across the globe, delivering programmes virtually and in-country.



## North & Central America

USA  
Canada  
Mexico



## Latin America

Brazil



## Africa

Algeria  
Ethiopia  
Guinea  
Ivory Coast  
Kenya  
Morocco  
Nigeria  
Rwanda  
South Africa  
Uganda



## Europe

Belgium  
Channel Isles  
Cyprus  
Czech Rep.  
Denmark  
Estonia  
Finland  
France  
Germany  
Greece  
Hungary  
Ireland  
Italy  
Lithuania  
Luxembourg  
Poland  
Portugal  
Russia  
Spain  
Sweden  
Switzerland  
Netherlands  
UK



## Middle East

Qatar  
UAE



## Australasia

Australia  
New Zealand



## Asia

China  
Hong Kong  
India  
Singapore  
Thailand  
Vietnam

# Our cultures and values

Our culture and our values sit at the heart of all we do, the clients we choose to work with, the way we help and support each other and the way we choose to grow our business.

We work for the good of the leaders and the firm and are constantly evolving to ensure we are always providing leading practice.

Like many firms we have spent time over the last year reflecting and refining our values. We care deeply about our clients, placing the highest possible value on our relationships with them. We focus on building and sustaining authentic relationships with the organisations and leaders we work with. To achieve this, we are generous with our time, stay human and are easy to work with.

We realise the importance of being succession minded. We want to build a partnership that works across generations and lays long term foundations for future success as much as it meets the needs of the clients and partners of today.



## Our expertise

We are a leadership consultancy, supporting professional services firms and financial institutions on their business challenges. We pride ourselves on listening to the organisational voice to really understand our clients' needs and culture to ensure advice and services fit and resonate deeply. We work for the good of the leaders and the firm and are constantly evolving to ensure we are always providing leading practice.

The following pages showcase the sorts of issues and challenges we support leaders with...

# Leadership

Leadership happens at all levels in professional services firms and we work right across the spectrum from boards looking to make a difference in their firms to lawyers stepping into leadership roles for the first time.

When we work with top teams and emerging leaders, we help them lead in a way that encourages and inspires a strong sense of followership within the firm. We believe that leadership is not a title, but a role in which you have the opportunity to build a strong culture and provide your followers with a sense of purpose.



**Henry Marsden**  
Head of Leadership

Henry heads up the team, with heavyweight talent joining us from A&O, KPMG and EY. Clients value our support on governance issues, board effectiveness and succession planning.

## Success stories from recent programmes include:



### Engaging the partners

The firm's leadership team was disconnected from the partnership who were being asked to deliver an increasingly different strategy for the firm.

We were engaged to create a dialogue programme addressing the questions the MP was concerned about, to provide insights to facilitate the discussion with the partners and to capture their reflections. Seven iterations of this programme ran over four years to engage the whole partnership. The MP was re-elected and used the insights to inform the firm's refreshed direction and culture. They reported greater integration, energy, commitment and focus.



### Current and future leaders

The MP and SP saw that partners in significant leadership roles were struggling with issues including low confidence, autocratic leadership and little vision.

We designed a programme to develop those holding current leadership roles and those with potential to do so in the near future. Using a blend of in-person sessions, online learning, action learning groups and coaching, the programme created the opportunity for the leadership team to build relationships with the participants and ultimately deliver the transformation the firm needed. The programme is about to run for the second time (3 years later) with many of the original attendees now holding Board positions and actively sponsoring the work.



# Talent

Business success in professional and financial services firms is largely dependent upon the quality of execution and therefore the capability of key individuals within the firm.

Partners have different needs at different stages of their career. We help firms with their entire partner talent lifecycle from supporting lawyers into partnership and accelerating through into leadership positions, integrating laterals, through to helping partners consider their next steps after partnership. The most successful firms understand that developing their people faster and more effectively than their competitors will provide them with a competitive advantage.



**Dirk Eilers and Henry Marsden**

Co-heads of People

Dirk and Henry lead our People team, many of whom have worked as HR Directors and heads of L&D. They are skilled in supporting the entire partner lifecycle.

## Success stories from recent programmes include:



### Partner election

The Chair of the New Partner Committee felt they were missing data about candidates they felt might struggle to adapt to partnership and lacked “teeth” in relation to challenging the decisions of strong sponsors.

We designed and ran a business psychology review process to help the candidates identify gaps they would need to fill to become highly effective partners and to develop committee members to work with the information.

We are now into our 5th year of running this process alongside the Committee who welcome the additional data and insights that are provided at interview and beyond.



### Supporting succession and elections

Following multiple terms by the incumbent MP the SP and Board were concerned about the potential and suitability of the future partners stepping into the role.

Our role was to support a governance refresh, encourage partners to stand and to develop a programme of learning and insights for those considering standing. The firm has completed the elections and the candidates are mid-handover with the incumbent MP. The results so far are promising.

# Clients

## We help transform client relationships by building effective client teams and developing trusted advisors.

We have years of experience in advising partners how to set up for success. We deliver development initiatives that make a difference and provide a suite of evidence-based tools that stretch performance year on year.

Done well, client teams and trusted advisors will transform your firm and build leaders of the future.



**Ebba Bahl**

Head of Clients

With former directors of BD and Client Relationships in the team, clients value our support on transforming client relationships.

### Success stories from recent programmes include:



#### Client leadership

A global law firm had an excellent client base but only 20% of the clients worked with more than one office or practice group. The firm set a strategy to have 20 clients delivering fees of over \$20m by the year 2020 alongside all partners raising their level of ambition for their client relationships.

Our role was to develop a programme of support with the Client Relationship Partners, industry group leaders and members of the Executive Committee. By blending internal inputs, external thinking, rehearsals with client executives, success stories and coaching, the programme delivered shifts in mindset, ambition, confidence and fees. Having built a strong initial focus the programme was then adapted and rolled out as part of a broader initiative to raise the sights of partners developing high growth clients.



#### Accelerating trusted advisors

A global investment bank wondered if they could bottle the “special sauce” of those few people who were able to operate at the highest level of clients on behalf of the bank and get it into the DNA of the juniors.

PSFI built a bespoke model for the bank, developed a comprehensive programme of support and provided confidential coaching. The programme progressed from a regional pilot to a global programme offered to all those going through a significant proposal. Feedback from clients was tracked as ROI as well as internal measures and self-monitoring reports. All indicated significant improvements in the quality of relationship with the client.

# Coaching

Coaching is where the ‘rubber hits the road’: it’s about individuals and teams working through what they want and need to achieve, the challenges of getting there, and how to actually create change on the ground.

We offer coaching to individuals both as an integral part of our programmes, and as a self-standing service. We also have a deep expertise in coaching teams and helping you building your own internal coaching capability, and in coaching supervision. Whichever form it takes, our coaching work helps to create deep and lasting transformational change, across individuals, teams and organisations.

We have coaches in the key regions of the world who are also used to working digitally.



**Jason Rabinowitz**

Head of Coaching

Jason heads our global team of coaches, who are all professionally coach trained, accredited with a coaching body, in a supervision relationship, have over 500 hours of coaching experience and work regularly in professional and financial services.

## Success stories from recent programmes include:



### Forging a powerful new executive team

A leading global insurance company was facing the challenge of a new business unit being formed by merging previously separate country organisations. The new leadership team was struggling to work together, with a lack of clarity about their role and mutual suspicions about intentions. We worked with them to create a truly unified team with a core purpose, clear roles, effective processes and most importantly, high levels of trust, mutual support and challenge. Initial success came from enabling the team members to connect at a deeper personal level. Over the last two and a half years we have supported them through the challenges of the pandemic, focusing on supporting staff in a caring way and through a CEO transition. Team members remark that this is by far the best team they have ever been part of.



### Building transformational leadership skills

A partner at a consulting firm aspired to create a new, more inclusive culture in his office and challenge himself to develop as a transformational leader. Over the course of two years, a PSFI coach supported him, providing appropriate challenge where needed and empathy and motivation when times were tough. Starting with an in-depth 360 review and psychometrics, we helped the partner create an inspirational vision for the culture of his office – and the leadership role he would play in helping to create this. This required leaving behind aspects of what had previously made him successful and courageously embracing new ways of thinking, behaving and being. He is now head of the office, which has become a role model in the broader global organisation for its culture that skilfully balances commercial performance with honest and heartfelt humanity.

# Performance

We help build the disciplines, skills and structures to increase business performance and the return to stakeholders in the business.

We take a holistic approach and clients value our expertise on all aspects of the matter or assignment lifecycle starting from pitching, extending to pricing and fee negotiation right through to commercial matter management. We often start by helping our clients identify the source of their biggest or most frequent profit leaks as well as to define their value-add. This helps them focus on those areas of greatest impact as well as to have better client conversations, turning pitching on its head. Our renowned fee negotiation programme helps clients transform the way they approach fee related interactions with clients. We also work with clients to design tailored profitability playbooks and work with them to ensure successful implementation to transform the profitability of a practice and/or firm.



**Ori Wiener**

Head of Performance

With former leading COOs, the Performance team is skilled at helping clients develop and change partner behaviour; turning strategy into action; and helping clients to focus on what's truly important.

## Success stories from recent programmes include:



### Re-establishing competitiveness

A leading insurance claims firm experienced a plateau in levels of fee income and profitability due to a declining relevance of the brand in many of its previously strong markets.

We worked with the firm to explore the most profitable future direction of the firm while preserving the great standing of the firm within the overall insurance market. PSFI supported the development of a plan to implement the changes in direction and worked with the leadership team to refocus the measures of performance that best supported the plan and improvement programme. The firm reworked its claims activity to increase gearing, lower the use of central London premises, and continue to build new services in commercial litigation and corporate insurance.



### Raising sustained profitability

A leading domestic law firm was struggling to raise profitability. The firm had a culture of high partner autonomy resulting in hourly rates not increasing.

Working together with the executive leadership team our work included designing and delivering a programme to raise awareness for the major levers of law firm profitability and opportunities to apply these, introducing a common language and understanding around profitability & pricing, increasing collaboration across offices and practice areas for immediate profitability improvements, encouraging partners to set profitability improvement objectives and set the foundations for a more managed and co-ordinated approach to pricing and commercial matter management.

As a result, we are currently working on establishing and introducing a profitability and pricing governance framework as well as supporting key partners and support functions to implement it.



[psfi.org](https://psfi.org)

'PSFI' is the trading name of PSFI LLP, a Limited Liability Partnership registered in England and Wales with the Partnership Number OC439907 and with its registered office at 6 Cobden Court, Wimpole Close, Bromley, England, BR2 9JF.