



# Transforming your business, together

Introducing PSFI

## 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 leading law firms, global investment banks, major consultancies, private equity firms and built environment 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 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

henry.marsden@psfi.org

T: +44 (0) 7717 472165

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

PSFI currently consists of eight partners and seventeen principal consultants.

Our people have extensive experience and insight gained from working with and within financial and professional services firms around the world, many having held senior leadership roles within some of the world's top legal and accounting firms as well as financial institutions.

We also have a carefully curated community of complementary associates who have experience of working in the PSF market.



**Ebba Bahl**

Partner, PSFI

ebba.bahl@psfi.org  
T: +49 (0) 179 453 4448

Ebba is a business development professional, with over 20 years' experience working for a wide range of domestic and international professional service and law firms. As a coach and lawyer, she specialises in the strategic client relationship management and development as well as business development challenges of her clients.



**Dirk Eilers**

Partner, PSFI

dirk.eilers@psfi.org  
T: +49 (0) 173 341 8247

Dirk is a Partner at PSFI and focuses primarily on pricing and profitability enhancement. He has more than 18 years' experience working for magic circle law firms and also logistics giant UPS.



**Toby Hoskins**

Partner, PSFI

toby.hoskins@psfi.org  
T: +44 (0) 7999 823318

Toby specialises in professional services firm strategy, enhancing leadership, talent development and how partners and firms win work. He has worked with over 40 professional service firms and delivered a wide range of business development initiatives to clients ranging from one-to-one coaching, team interventions, key accounts, becoming a trusted advisor and collaboration.



**Kevin Hogarth**

Partner, PSFI

kevin.hogarth@psfi.org  
T: +44 (0) 7400 689789

Kevin has extensive non-executive experience alongside nearly 40 years business experience in the professional services, financial services, education, charity and healthcare sectors. He is results orientated and expert in people, culture and organisation transformation and turnarounds.



**Henry Marsden**

Managing Partner, PSFI

henry.marsden@psfi.org  
T: +44 (0) 7717 472 165

Henry has worked with firms in an advisory capacity over the last 20 years in the field. As an experienced consultant and advisor as well as coach, Henry designs, develops and delivers development programmes to professional services clients. His work focus is on leadership development, supporting partner conferences, leadership development programmes, succession planning and top team development.



**Jason Rabinowitz**

Partner, PSFI

jason.rabinowitz@psfi.org  
T: +44 (0) 7887 692908

Jason works with clients at different levels to help them unlock their potential, drawing on his experience of having worked in the world's leading management consultancy and investment banking firms. He works at three levels: coaching individuals, supporting teams, and on systemic issues organizational issues including culture and leadership.



**Mike Mister**

Partner, PSFI

mike.mister@psfi.org  
T: +44 (0) 7885 431011

Mike works with professional services firms on designing, developing and supporting change agendas and building improved leadership capabilities in partners. His areas of expertise include helping organisations understand the importance of partners as leaders in building sustainable practices, the leadership and motivation of diverse, high performing teams and leadership across the partner life cycle.



**Ori Wiener**

Chair, PSFI

ori.wiener@psfi.org  
T: +49 (0) 173 722 9121

Ori is one of the leading international authorities in the areas of strategic business development as well as pricing, fee negotiation and profitability improvement. Ori regularly delivers international development programmes and has worked with senior and mid-level executives from over 75 professional firms including investment banking, asset management, accounting, consulting and law firms.

# Meet our Principal Consultants



## Louise Buckle

Principal Consultant, PSFI

[louise.buckle@psfi.org](mailto:louise.buckle@psfi.org)  
T: +44 (0) 7876 148389

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.

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## Clint Evans

Principal Consultant, PSFI

[clint.evans@psfi.org](mailto:clint.evans@psfi.org)  
T: +44 (0) 7951 764530

Clint acts as mentor, coach and advisor to leaders of professional service firms particularly on issues of strategic change and performance improvement. He has been a CEO and COO in international firms and was commercial director at a major UK business school.

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## Martin Hill

Principal Consultant, PSFI

[Martin.hill@psfi.org](mailto:Martin.hill@psfi.org)  
T: +852 9819 9154

Martin is a highly experienced learning and development leader, facilitator, and coach with over 20 years' experience working with partnerships. His work focuses on leadership and organisational development, and works at all levels of professional service firms.

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## Joanna Corr

Senior Principal, PSFI

[joanna.corr@psfi.org](mailto:joanna.corr@psfi.org)  
T: +44 (0) 7833 515057

Joanna specialises in the development of professionals as leaders with their clients and with their teams. She also focuses on the implementation of talent management and client relationship strategies.

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## Matthew Fuller

Principal Consultant, PSFI

[matthew.fuller@psfi.org](mailto:matthew.fuller@psfi.org)  
T: +44 (0) 7767 674333

Matthew is a BD and client strategy expert with decades of in-house experience working in leading global PSFs. He has held senior roles with Allen & Overy, Herbert Smith and most recently with US firm White & Case.

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## Jenny Jones

Principal Consultant, PSFI

[Jenny.jones@psfi.org](mailto:Jenny.jones@psfi.org)  
T: +44 (0) 7811 956276

Jenny is a highly accomplished COO with decades of experience operating at the top level of global, fast growing law firms. She excels in driving strategic growth and cultural transformation. She has a proven track record of leading complex business solutions and fostering collaborative environments.

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## Peter Duff

Principal Consultant, PSFI

[peter.duff@psfi.org](mailto:peter.duff@psfi.org)  
T: +44 (0) 7834 445 375

Peter has been a Board member at Shoosmiths LLP for the last 18 years and spent nine of those as Chair. Drawing on this vast experience and collaborative style of working, along with his training as a HR lawyer, he supports businesses and leaders through periods of change and challenging projects.

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## Jason Haines

Principal Consultant, PSFI

[Jason.haines@psfi.org](mailto:Jason.haines@psfi.org)  
T: +44 (0) 7778 767178

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.

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## Pia Kleiber

Principal Consultant, PSFI

[Pia.kleiber@psfi.org](mailto:Pia.kleiber@psfi.org)  
T: +49 (0) 1607 275655

Pia has more than a decades' experience working in procurement roles with responsibility for the development and implementation of procurement projects and strategy in addition to the training and development of procurement teams. Pia specialises in commercial negotiations, she has led various high-stake negotiation projects, workshops and training sessions in her previous role as a Director in a negotiation consultancy.

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# Meet our Principal Consultants



**Derek Klyhn**

Principal Consultant, PSFI

derek.klyhn@psfi.org  
T: +44 (0) 7901 515188

Derek specialises in the areas of strategy, profit enhancement, business development and strategic marketing. He has developed several innovative interventions that help partners and leaders of professional services firms be more effective in achieving their goals.

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**Julie Morrison**

Principal Consultant, PSFI

julie.morrison@psfi.org  
T: +44 (0) 7879 453767

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.

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**Jonny Tapnack**

Principal Consultant, PSFI

jonny.tapnack@psfi.org  
T: +44 (0) 7812 180494

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.

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**Iain Maclean**

Principal Consultant, PSFI

iain.maclean@psfi.org  
T: +44 (0) 7711 704820

Iain is a business development skills trainer and consultant who helps a wide spectrum of international professional service firm leaders to enhance the sales performance and the profitability of their firms.

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**Rebecca Normand-Hochman**

Principal Consultant, PSFI

Rebecca.normand-hochman@psfi.org  
T: +44 (0) 7723 875619  
T: +33 64484 6563

Rebecca Normand-Hochman is a leadership consultant, senior executive coach and a systemic team coach who works with leaders and leadership teams to help them address organisational challenges and implement strategic change.

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**Alastair Young**

Principal Consultant, PSFI

alastair.young@psfi.org  
T: +44 (0) 7464 374533

Alastair is the former Managing Partner of the Dentons' Middle East business. He was also a member of the Dentons' ExCo and Board. Alastair focusses on all aspects of business activity and specifically leadership, profitability and the creation and management of high performing teams. He has extensive leadership experience in multi-cultural and multi-geographical locations. Alastair is also a Meyler Campbell qualified executive coach.

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**Alastair Mitchell**

Principal Consultant, PSFI

Alastair.mitchell@psfi.org  
T: +44 (0) 7818 011868

Alastair is a Chartered Accountant with extensive experience in senior management roles internationally and a qualified executive coach with Meyler Campbell. He has substantial change management experience and strong leadership, motivational and communication skills.

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**Allyson Stewart-Allen**

Principal Consultant, PSFI

allyson.stewart-allen@psfi.org  
T: +44 (0)20 7828 9400

Allyson Stewart-Allen is a renowned advisor, author, speaker, broadcaster, educator and NED whose expertise in brand internationalisation is sought by leading businesses globally.

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



## Europe

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



## Middle East

Qatar  
UAE



## Australasia

Australia  
New Zealand



## Asia

China	India	Thailand
Hong Kong	Singapore	Vietnam

# Our purpose and values

Our core purpose 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.

Like many firms we have spent time over the last year reflecting and refining our purpose and 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.

## Our Purpose

To help professionals and their organisations solve their toughest problems, build thriving cultures and deliver sustainable value.

## Collaborative

We work in a co-creative way alongside our clients, recognising that the best solutions come from our collective spark. We are collaborative, generous and supportive with our clients and with each other.

## Curious

We are constantly evolving and learning and are never content with obvious explanations or easy solutions. We favour a growth mindset and relish working with emergence, complexity and ambiguity.

## Challenging

We are 'fierce friends' and challenge our clients to be the best they can be. We do not shy away from saying what needs to be said in order to improve performance. And we challenge ourselves to grow and reach our potential.

## Committed

We care about the success of our clients. We focus on building and sustaining authentic relationships with our clients and pull out all the stops to deliver what we promise. We are committed to helping build inspirational leadership and sustainable cultures (including our own) that create personal fulfilment and make a valuable contribution to the world.

## Commercially Minded Experts

We value our deep experience of working at senior levels in high performing professional organisations. We balance rigorous thinking and evidence-based best practice with a commercial mindset, pragmatic lightness of touch and a spirit of humility. We understand what it takes to shift behaviour and change performance for transformation that lasts.

## 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 financial institutions and professional services firms and we work right across the spectrum from boards looking to make a difference in their firms to lawyers stepping into partnership 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 Talent

Dirk and Henry lead our Talent 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 both as an integral part of our programmes, and as a self-standing service. Whichever form it takes, our coaching involves creating deep and transformational relationships, working in parallel on behaviour, mindsets and values.

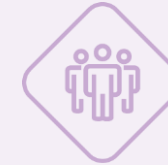
We balance the profound with the pragmatic, and the individual with the system. All of our coaches are highly experienced and qualified, with backgrounds in business and management at some of the world’s leading organisations.



**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 firms improve their profitability. 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.

Our profitability related offerings are typically used by client leadership teams to support their firm wide strategic profitability objectives. Other clients have involved us when supporting practice leaders' efforts to revitalise underperforming groups.



**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**

'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 124 City Road, London, EC1V 2NX.