PSFI’s Leadership Practice

Helping clients build critical leadership capability

Developing leadership capability

Thank you for this opportunity to share our leadership credentials.

Firms continue to grow significantly in scale and complexity placing greater demands on leadership structures and those holding leadership positions.

We support leaders on their most complex challenges, from helping the board and exec function at their best, to advising on governance reviews, shaping leadership elections, building leadership bench strength and navigating complicated transitions.

We have a wealth of experience having worked with most of the leading professional and financial services firms. However, we are something of a well-kept secret given so much of our work in this area is confidential.

We have recently evolved and expanded our leadership practice with several new senior practitioners joining our team. We believe our people are in a league of their own, unmatched in terms of their expertise and experience, with our team members not only being highly sought after as consultants, but also having held highly senior leadership positions themselves.

We would love the opportunity to discuss how we could best support your leadership development needs and aspirations.

Henry Marsden
Partner & Head of Leadership, PSFI

henry.marsden@psfi.org
T:+44 (0) 7717 472165

Henry works alongside partners and leaders to help them achieve their ambitions and challenge them to excel at what they do. With more than 20 years' experience, his work focus is on leadership development, supporting partner conferences, leadership development programmes, succession planning and top team development.

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.

Why choose PSFI for leadership development

EXPERTISE

1

We get the sector. Our people are unmatched in terms of depth of expertise. Together we have many decades of experience.

RELATIONSHIPS

2

We value our deep personal relationships that span the decades. We focus on building and sustaining authentic relationships with our clients.

INSIGHT

3

We understand what it takes to shift behaviour and change performance for transformation that lasts.

Meet your leadership team

Our people have extensive experience and insight gained from working with and within professional and financial services firms around the world at the highest level. They have gone on to become skilled coaches, mentors and advisors who are equipped to support leaders to achieve their personal and business ambitions.

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Managing Partner, PSFI

henry.marsden@psfi.org
T: +44 (0) 7717 472165

Henry heads the team. He has more than 20 years' experience working with leaders of professional services firms.

Louise Buckle
Principal Consultant, PSFI

Miriam Desjardins
Principal Consultant, PSFI

Peter Duff
Partner, PSFI

Celine Fontaine
Associate, PSFI

Keith Goddard
Associate, PSFI

Jason Haines
Principal Consultant, PSFI

Kevin Hogarth
Partner, PSFI

Toby Hoskins
Senior Principal, PSFI

Chris Lang
Associate, PSFI

Jon Lurie
Associate, PSFI

Mike Mister
Partner, PSFI

Julie Morrison
Principal Consultant, PSFI

Rebecca Normand-Hochman
Principal Consultant, PSFI

Christine O'Shea
Associate, PSFI

Jason Rabinowitz
Senior Principal, PSFI

Caroline Rawes
Principal Consultant, PSFI

Kevan Skelton
Associate, PSFI

Chris Smith
Associate, PSFI

Allyson Stewart-Allen
Principal Consultant, PSFI

Ori Wiener
Chair, PSFI

Alastair Young
Principal Consultant, PSFI

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...

Creating highly effective top teams

Boards and execs can so often get stuck in the operational weeds, lack clarity and struggle to work effectively together. We bring people together, build trust, clarify roles and purpose, improve relationship dynamics and create highly effective top teams.

Success stories from recent programmes include:

Developing the board

The Chair of the partnership counsel was concerned that they could be doing much better to meet their brief. They were often getting into the operational weeds of the firm, politically representing their part of the business and feeling like they were rubber stamping decisions made by the Managing Partner so lacking in support and challenge.

We were engaged to advise on best practice for partnership boards (relative to the corporate best standards), consult with individual board members to gather perspectives on what was working well and where improvements were needed. We then co-created a board development agenda that sat alongside their regular meetings and sought to increase the effectiveness of their contribution over time. We brought many resources to the board in terms of sessions, diagnostics, practitioners from other sectors and leading academics based on the perceived needs of those around the Board table and the best practice.

We continue to support the board as team coaches and the work delivered has been seen as significantly improving the relationship between the Board and the Executive, clarifying the role of the partners as non-executives, improving relationships around the board table and providing a means of generating thought leadership for the firm.

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 three 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.

Developing leadership bench strength

Moving from a practitioner, delivering excellent service, to taking on a leadership role is both motivating and challenging. We work alongside top teams and emerging practice, sector and regional leaders to accelerate this transition and ensure the organisation has a strong pipeline of future leaders in the business.

Success stories from recent programmes include:

Future leaders programme

The current leadership had successfully driven an ambitious agenda for growth over their lengthy tenure. They were looking at the leadership succession plan for the firm and how best to support those in both the current leadership roles and those with an interest in taking on the Managing Partner role who might continue to build on the momentum as a firm.

We advised this team on the candidate selection and designed a tailored programme to blend the unique needs of the firm in terms of its strategy, history and culture along with best-in-class support provided in external leadership development. Our programme provided a mix of in-person sessions, online learning, project learning groups and coaching. It created the opportunity for the existing leadership team to build relationships with the next generation of leaders and for them to develop a cohort of leaders rising through the firm.

The programme successfully supported their leadership transition 18 months later. One of the participants was elected as the MP and a number of others have taken up significant practice, sector and office roles or joined the firm's supervisory board. The programme was credited with supporting a smoother transition, and providing reassurance of the quality of leadership going forward. Initially seen as a one-off, we are now working alongside the firm to continue to develop succession planning for the longer-term future of the firm, which continues to grow at a significant rate.

Engaging with strategy

A Managing Partner who was part way through their second term was frustrated at the speed of progress being made against the firm's strategy. Having gone through a significant consultation and engagement process around their reframed direction, they could see people saying the words but not adjusting behaviours and decisions, and the traditional communications were not building the change needed.

Working with the Managing Partner, we hand-picked attendees for the programme who were in leadership positions across the business. We developed an intervention that combined engaging with the strategic pillars of the strategy (market changes, profitability improvement, partner business model, talent development, innovation) with insights from our own faculty and external experts. The programme supported the Managing Partner to engage their leadership team with the changes needed, develop concrete plans to deliver the strategy, and improve the confidence and capability of the partners in key leadership roles. The programme was credited with significantly accelerating the delivery of the strategy, reinforcing the culture of partnership in strategic delivery, and creating a dialogue between the leaders at the coal face with the executive in adapting the strategy to front into the issues faced by the partners.

Empowering the leadership team

Significant growth means it is difficult to get the partners round the table to agree things. Rebalancing how the firm works in terms of its governance and management is often required. We work alongside leaders seeking to engage their partners as they revisit, reimagine and refresh their leadership structures to reflect how the firm has evolved.

Success stories from recent programmes include:

Ironing out post-merger integration

This firm had been through a merger five years previously and was finding that many of the things agreed at that time were now holding back the firm in terms of its future (e.g. authority given to the MP, number of terms in office, voting rights of the partnership, other defined roles).

We worked closely with the Senior Partner to define the scope of the changes that they were considering and the options that they were exploring. We then interviewed a representative sample of the partners about the envisaged changes to test the thinking. Options were then shared in small group partner meetings before a final recommendation was made by the SP and the Board for voting.

The proposals put before the partners received well over the majority required to approve the change (you can't get everyone) and the feedback demonstrated how appreciative the partners were of being consulted and how it had reinforced the glue of partnership.

Building on growth

Under the tenure of the current Managing Partner, the firm had more than doubled in partners and turnover, added multiple service lines and moved to new offices. As the Managing Partner was not going to stand again in the forthcoming election the Supervisory Board saw an opportunity to "rethink" the leadership structure of the business so the role could be more manageable for a future successor.

After facilitating discussions for the Board, we articulated the potential needs for two further positions in the business around a COO to support the next MP and the creation of a Senior Partnership/Chair role to reflect the size of the partnership. Our work was to craft the scope of options for the firm's future leadership, conduct individual consultations with all equity partners and facilitate further discussions with the other partner and professional support staff. The discussions framed a plan for the future roles and the changes needed to be made to the governance framework to provide the necessary scope to fulfil these roles.

We continue to support the firm through the preparation and implementation of these roles and how best to develop those within the firm to step into these positions.

Shaping leadership elections

A change in the top leadership positions in the business can be a nervous moment for all involved. We have modelled, discussed and advised many partnerships on how they manage this process given their unique histories and approaches. We help get the best candidates to come forward, ensure they are fit to stand and minimise the risks of things going awry in election and handover phases.

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.

Transitioning from leadership and partnership

A change in the top leadership positions in the business can be a nervous moment for all involved. We have modelled, discussed and advised many partnerships on how they manage this process given their unique histories and approaches. We help get the best candidates to come forward, ensure they are fit to stand and minimise the risks of things going awry in election and handover phases.

Success stories from recent programmes include:

Planning an orderly transition

A long serving senior partner was approaching the time that the members agreement said he needed to step down. Over a period of 12 months and a number of meetings we helped him with the planning and execution of his withdrawal plan.

Discussing issues such as client handover, the transfer of executive responsibilities, and dealing with the all-important issue of what to do personally when the departure time arrived, we created a highly practical, actionable roadmap. This level of support in usually invaluable for ensuring a smooth transfer for the incoming executive and a smooth transfer to life outside the firm for the senior partner.

Group retirement

A firm with a number of partners due to retire at the same time sought to build more of community of ambassadors to support their alumni efforts.

Over a six-month period we ran two short workshops dealing with transition/retirement issues and supported the partners with coaching and mentoring. The end result was smooth client hand overs, the departing partners more settled in the post-firm choices and a better post-departure connection with the alumni network.

Transformational coaching & mentoring

Coaching and mentoring 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. All of our coaches are highly experienced and qualified, with backgrounds in business and management at some of the world’s leading organisations.

Success stories from recent programmes include:

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.

Commercial and leadership mentoring

A global leader in a professional services firm was finding it hard to find the time to make space to do the important thinking they knew they needed to do. We supported them with a structured and bespoke full strategy day. We agreed in advance the focus and flow of the day which included walking together to create space to think more strategically. We then explored where they were in their own career and to identify the necessary shift in leadership behaviours. We also spent time looking at their team, their capabilities and aspirations. We then considered the market and the strategy they were pursuing, stress testing this against recent shifts and challenges. Together we identified some key relationships and strategic connections that needed strengthening in order for them to be able to execute on the emerging plan.

Finally we did some highly creative work, crafting a coherent narrative and communication strategy. The leader was ready to go back to their team the next day with some clear messages on the subtle but important shifts to the direction of travel for their function and clear asks of them as individuals and as a team. The leader said this commercial mentoring provided a much needed, structured, intensive, and action-oriented time-out at a critical moment.

The practice in context

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 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.

Contact:

Henry Marsden
Managing Partner, PSFI

henry.marsden@psfi.org
T: +44 (0) 7717 472165

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.

'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.