



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 organizations in the US to bring transformational change.

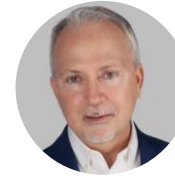
Our understanding of the US market ensures our programs are relevant and practical.

Our presence in the US is supported by our established teams in the UK and Europe, enabling us to deliver seamlessly both locally and internationally. This means we can offer clients in the US the same complete consultancy service that global firms have relied on us for over many years.

Our team in the US, together with colleagues from across our network, delivers expertise in Leadership, Client relationships, Talent, Performance and Coaching.

Our growing presence in the US ensures that we can provide culturally relevant, evidence-based advice that helps firms achieve lasting improvements — while connecting seamlessly to the global perspective and experience our clients have come to expect from us. We would love the opportunity to meet you, understand your challenges and share some of our recent work with you.

Kind regards, Clay



Clayton Shedd

Principal Consultant, PSFI

Clayton.shedd@psfi.org

Clayton Shedd has more than 20 years of leadership experience in executive development and leadership coaching beginning with Euromoney Institutional Investor in New York. From there he joined The Conference Board, developing CEO roundtables on corporate governance and M&A. Having also overseen executive development programs for firms from over 15 countries while at Columbia Business School and UCLA Executive Education, he has a strong understanding of various cultures and management styles.

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 team combines deep global experience in financial and professional services, including senior leadership roles, with a curated network of associates who bring complementary PSF expertise.



Ebba Bahl
Partner, PSFI

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 specializes in strategic client relationship management and business development.



Peter Duff
Partner, PSFI

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, along with his training as a HR lawyer, he supports businesses and leaders through periods of change and challenging projects.



Dirk Eilers
Partner, PSFI

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.



Matthew Fuller
Partner, PSFI

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.



Kevin Hogarth
Partner, PSFI

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 organization transformation and turnarounds.



Pia Kleiber
Partner, PSFI

Pia has worked in procurement roles for the past decade with responsibility for the development and implementation of procurement projects and strategy in addition to the training and development of procurement teams. Pia specializes in commercial negotiations.



Henry Marsden
Managing Partner, PSFI

As an experienced consultant and advisor as well as coach for the past 20 years, Henry designs, develops and delivers development programs. His focus is on leadership development, supporting partner conferences, succession planning and top team development.



Mike Mister
Partner, PSFI

Mike designs, develops and supports change agendas and builds improved leadership capabilities in partners. His areas of expertise include helping organizations understand the importance of partners as leaders in building sustainable practices, leading diverse, high performing teams and leadership across the partner life cycle.



Alastair Mitchell
Partner, PSFI

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.



Ori Wiener
Chair, PSFI

Ori is one of the leading international authorities in strategic business development as well as pricing, fee negotiation and profitability improvement. Ori regularly delivers international development programs and has worked with senior and mid-level executives from over 75 professional firms.

Meet our Principal Consultants



Richard Album

Principal Consultant, PSFI

Richard is a learning facilitator, skills trainer, executive coach, L&D professional and former city lawyer. He has worked with senior leaders and teams across multiple sectors including law, financial services and politics. He has sat on the Executive Board of a major international business for 6 years, and is a past Chair of 'Learning in Law'.



Louise Buckle

Principal Consultant, PSFI

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.



Pauline Caldwell

Principal Consultant, PSFI

Pauline has 25 years' experience working for professional service firms focusing primarily on people leadership and development and executive coaching. She is adept at operating both internationally and at the highest organizational levels, advising boards, senior leaders and their teams.



Miriam Desjardins

Principal Consultant, PSFI

Miriam has more than 25 years' experience working in the development of people and organizations, with ten of those years spent in management positions. Her focus is on leadership development, talent management, cultural development and coaching. She has worked across a broad range of industries.



Clint Evans

Principal Consultant, PSFI

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.



Judy Ginsberg

Principal Consultant, PSFI

Judy is an experienced business director with over 30 years' experience working in professional services organizations focusing on client relationship management and development, client listening, marketing and business development. She has a proven track record of working comfortably and effectively at board level.



Jason Haines

Principal Consultant, PSFI

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.



Martin Hill

Principal Consultant, PSFI

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 organizational development, and works at all levels of professional service firms.



Toby Hoskins

Senior Principal, PSFI

Toby specializes 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 ranging from one-to-one coaching, team interventions, key accounts and becoming a trusted advisor.



Gareth John

Principal Consultant, PSFI

Gareth is an experienced executive coach, board advisor, General Counsel, director and trustee with a strong track record of supporting executives and boards across different countries and sectors, focusing on strategy, governance, executive development and risk management. He has specific expertise in AI ethics and governance.



Derek Klyhn

Principal Consultant, PSFI

Derek specializes 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.



Iain Maclean

Principal Consultant, PSFI

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.

Meet our Principal Consultants



Julie Morrison

Principal Consultant, PSFI

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.



Rebecca Normand-Hochman

Principal Consultant, PSFI

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 organizational challenges and implement strategic change.



Jason Rabinowitz

Senior Principal, PSFI

Jason works with clients 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 organizational issues including culture and leadership.



Caroline Rawes

Principal Consultant, PSFI

Caroline is an experienced people and leadership advisor with more than 30 years' experience in global, people-based businesses, including private equity and major professional services firms. She works with Managing Partners, CEOs, boards and executive teams to strengthen business performance through clear strategic direction, effective leadership and inclusive, aligned cultures.



Clayton Shedd

Principal Consultant, PSFI

Clayton has more than 20 years' experience in leadership development, business development and account management. He is a PCC-level executive coach and has worked with diverse, global clients across multiple industries and sectors.



Allyson Stewart-Allen

Principal Consultant, PSFI

Allyson Stewart-Allen is a renowned advisor, author, speaker, educator and NED whose expertise in brand internationalization is sought by leading businesses globally. She has advised over 280 companies across 27 countries and is the author of best-selling book "Working with Americans." Allyson is a regular broadcaster and contributor for a range of media outlets.



David Woodward

Principal Consultant, PSFI

David is an experienced business leader and consultant, recognized for driving strategic transformation, change management, and leadership development. With extensive experience as a Big 4 Partner and board member, he is known for growing businesses, building high-performing teams, and mentoring senior leaders across various sectors.



Alastair Young

Principal Consultant, PSFI

Alastair is the former Managing Partner of the Dentons' Middle East business, where he was also a member of the ExCo and Board. He focuses on 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 qualified executive coach.

Our North American team

We've brought together a group of experienced coaches and consultants from across North America and we are actively growing this group.



Wendy Myers Cambor

Wendy is a certified leadership coach and consultant specializing in professional and financial services. She has more than 30 years' experience implementing strategic solutions that improve business value for organizations, while enhancing the experience for people. As a Leadership Coach, Wendy works with emerging, established, and transitioning leaders who are ready to explore new possibilities and achieve outcomes they truly desire. Her unique approach is informed by positive psychology, neuroscience, business acumen and a belief that awareness empowers authenticity and authenticity drives performance.



Joan Caruso

Joan is a recognized leader in the field of executive coaching and has a background in organizational psychology. During her corporate career, Joan held a number of senior human resource management positions in complex corporate environments. She held responsibility for various aspects of human resources management including organization development, recruiting, internal placement and affirmative action. Joan has supported countless executives developing stronger leadership acumen, enhancing interpersonal communications and stretching themselves as strategists and decision-makers.



Juan Pablo Gonzalez

Juan Pablo has more than 25 years' experience in strategic and human capital planning, organization strategy and transformation, workforce planning, rewards strategy and program design, and performance measurement. In addition to serving as a senior partner in several firms, including EY and Korn Ferry, he has advised numerous, well-known professional services firms over the course of his career. He regularly speaks at industry events and has written numerous articles on strategy and talent. He is co-author of the book *Shockproof – How to Hardwire Your Business for Lasting Success*.



Dana Kirchman

Dana has 25 years' experience working internationally in leadership development, management consulting, executive coaching and strategy. For 12 years, she coached and facilitated in privately and publicly held companies. Dana's background includes direct executive experience as well as consulting. She has led teams in digital strategy, brand portfolio management, and post-merger organization. In these roles, Dana led transformation programs and experienced firsthand the challenges and rewards of driving growth and culture change.



Clayton Shedd

Clayton Shedd has more than 20 years of leadership experience in executive development and leadership coaching beginning with Euromoney Institutional Investor in New York. From there he joined The Conference Board, developing CEO roundtables on corporate governance and M&A. Having also overseen executive development programs for firms from over 15 countries while at Columbia Business School and UCLA Executive Education, he has a strong understanding of various cultures and management styles.

PSFI around the world

We have hubs in the UK, Germany and the US from which we work with clients across the globe, delivering programmes virtually and in-country, across North and Central America, Latin America, Africa, Europe, the Middle East, Australasia and Asia.



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 organizations 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 organizations solve their toughest problems, build thriving cultures and deliver sustainable value.

Collaborative

We work in a co-creative way alongside our clients, recognizing 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 favor 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 fulfillment 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 organizations. 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 behavior 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 organizational 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 programs 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 program 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 program 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 program 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 program created the opportunity for the leadership team to build relationships with the participants and ultimately deliver the transformation the firm needed. The program 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.



Henry Marsden

Head of Talent

Henry leads 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 programs 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 program 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 programs 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 program 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 program delivered shifts in mindset, ambition, confidence and fees. Having built a strong initial focus the program 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 program of support and provided confidential coaching. The program progressed from a regional pilot to a global program 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 programs, and as a self-standing service. Whichever form it takes, our coaching involves creating deep and transformational relationships, working in parallel on behavior, mindsets and values.

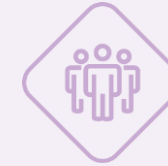
We balance the profound with the pragmatic, and the individual with the system. All of our coaches are highly experienced and qualified, with backgrounds in business and management at some of the world’s leading organizations.



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 programs 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 organizations. 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 organization for its culture that skillfully 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 program 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 revitalize underperforming groups.



Ori Wiener

Head of Performance

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

Success stories from recent programs 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 program. 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 program 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.