

# Alternative Asset Management Client: Helping a partnership model to reflect on their culture and values



*In our assessments, we:*

## **Discover** →

In our experience, high-performing teams do not just have clearly-defined roles and strong accountability; they also have highly evolved levels of self-awareness regarding their blind spots as well as strengths. With this in mind, we were engaged by a newly-established investment management partnership team who recognised a need for greater feedback both within the team and more broadly across their organisation. This 7 partner team was struggling to prioritize roles and responsibilities, tending to get caught up in discussing topics which were not relevant to everyone, thereby slowing progress and muddying accountabilities & follow-up. This was beginning to become visible to those in more junior roles, and the systems & processes to support the level of growth that the fund was looking for, were not always consistent.

## **Define** →

Our first step was to engage the partnership team in a full 360-feedback exercise. We gathered up to 25 verbal & online inputs per partner; comprising peer-to-peer feedback, bottom-up feedback, and external client & investment company feedback. Receiving that level of in-depth feedback can be tough if historically there's been a scarcity of it. So we consequently provided three coaching sessions with each partner to deliver their feedback individually, giving them space to reflect on the key areas and build a development action plan to share & agree with the rest of the partnership team. The volume of 360-feedback received also enabled us to systematically collate and analyse evidence for how the partnership's values were being lived and enacted at all levels of the organisation.

## **Deliver**

As a result of feedback being limited, self-awareness was also relatively low in some of the partners. So in sharing their learnings and development plans with the group really started to cultivate mutual authenticity and vulnerability – a first step towards stronger psychological safety & trust within a high performing team. Additionally, examining the evidence for how their corporate values were lived and breathed in the organization allowed the partnership team to examine whether they needed to redefine their values or facilitate easier ways for the behaviours to be enacted. The crucial combination of systematic feedback as well as granular individual feedback allowed the partnership team to successfully adjust their ways of working and build trust and honesty between themselves and the rest of the organisation:

*"Sarah-Jane and Joanna from the Work Psychologists go above and beyond to get to the crux and more granular issues at hand and are simultaneously able to zoom out to gather the bigger picture. In doing so, they enable the group to achieve true teamwork and collaboration to move towards both collective and individual performance development and objectives. Thank you for your impactful analyses and coaching!"*

