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different firms, you may get 10 different answers.

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**What IS the right stuff ...** to earn a promotion to partner? Ask 10 partners from different firms, you may get 10 different answers.

[[This article first appeared on the Rosenberg blog.](#)]

I have worked the following script dozens of times at partner retreats: I ask the group everything it takes to become a partner and write their responses on a flipchart.

When we're done, one of the partners yells out "Oh no. None of us qualifies!" And

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1. **Build great relationships with clients.** So much so that clients are equally comfortable calling or talking to the partner potential than the PIC. This is not limited to sociability. It's about partner-potentials being able to show clients that they are sharp, engaging, responsive professionals that have the knowledge and experience to truly help solve their problems, that they add value.
2. **Credibility with the staff** for being a great trainer, supervisor and delegator; someone the staff see as being able to help them in their career, not just someone who has a higher title.
3. **Ability to mentor** staff and help them learn and grow. This is different than #2 above, which is how the staff see the partner-potential. This is about what the partner-potential actually does to develop staff.
4. **Good communication skills.** Able to be clear and effective in oral (face to face and telephone) and written (emails and texts) communication. Ability to be persuasive with clients, staff, partners and referral sources.
5. **High energy;** great attitude about their work and passionate about the firm. Willing to do what it takes to get the job done, while still maintaining a work-life balance. Healthy work ethic.
6. **Trustworthy.** This is not about stealing money or committing other illegal or unethical acts. Instead, this is about partners feeling they can trust the person's judgment, that they will not take shortcuts, will not put the firm in danger. And finally, it's about other partners feeling good about being able to call the partner-potential "my partner."

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**[CPA Firm Succession Planning: A Perfect Storm](#) is a must-read for firms focusing on staying independent. This book addresses ►how to assess your existing staff ►leadership development ►MP transition ►governance structure needed to remain independent ►client transition ►partner buyout plan ►partner buy-in plan**

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## 7. Team player. Is this person a “me” person or a “we” person? Looks to do what’s

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to be a partner in a firm, one needs to be special, to stand out from all the rest of the staff. People want to follow leaders.

11. **Comfort with practice development.** This doesn’t mean a person needs to be a rainmaker. But they truly believe in the adage “you can’t not try” when it comes to developing business. Should have a healthy attitude towards PD and actually devote a meaningful amount of time on a continuous basis to PD practices that are effective (i.e., not taking your best friends out to lunch all the time).
2. **Perform work at a high level.** This does not mean that to be a partner, one has to be technical guru. But it does mean that when partners have technically complex, demanding tasks or projects, they are comfortable delegating them to the partner-potential because of the confidence they have in them to perform at a high level. Acid test: For the most part, when the partner-potential submits work to a partner for review, very few changes are required.

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Marc Rosenberg is a nationally known consultant, author and speaker on CPA firm management, strategy and partner issues. President of his own Chicago-based consulting firm, [The Rosenberg Associates](#), he is founder of the most authoritative annual survey of mid-sized CPA firm performance statistics in the country, The Rosenberg Survey. He has consulted with hundreds of firms throughout his 20+ year consulting career. He shares his expertise regularly on The Marc Rosenberg Blog.

Firm Management

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