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But we must keep in mind that the road to change or transformation is uphill.

Arianna Campbell • May. 21, 2018



Recently I talked to the leaders of a mid-size firm about creating a framework to improve their effectiveness, increase their capacity and take key steps toward transforming the focus of their firm from compliance to advisory. As we concluded the conversation, the managing partner asked me what I felt made the difference

between firms that were successful and those that struggled to make the change. It's

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Transformation happens one step at a time. One decision at a time. Repeated steps in the right direction lead to new destinations instead of down the same old paths. But we must keep in mind that the road to change or transformation is uphill.

In his book *No Limits: Blow the CAP Off Your Capacity*, author John Maxwell says, "Everything worthwhile in life — everything you want, everything you desire to achieve, everything you want to receive — is uphill. The problem is that most of us have uphill dreams but downhill habits." Discipline is the game changer.

Here are the five areas where discipline really makes a difference:

Make a plan and document it

Benjamin Franklin famously said, "If you fail to plan, you are planning to fail." Many firms say they have a plan but when we ask to see it, it is not written down or it is outdated.

It takes discipline to make, document and share a strategic plan and discipline to review it frequently and refresh it annually, especially while juggling competing priorities ranging from managing a book of business to managing talent. But resources (time and money) are limited. So it's crucial to identify and document your firm's strategic objectives and measurements of success. Only then can you hold yourself and your team accountable.

Have tough conversations

Holding people accountable is not always fun. But it IS necessary. We can't avoid having conversations to correct behavior that is in opposition to the firm vision. We

must have the courage and skillset to recognize that these conflicts can be a strategic

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proactive strategies to overcome them. You can't just revert to old habits as soon as the new direction gets challenging. Give yourself and others time to adjust to the learning curve. It takes time to change, and an obstacle is not a sign of failure. You must have the discipline to persevere.

Continual learning

The pace of change is accelerating faster and faster. You need to be aware of what is going on and then adjust accordingly. The profession today calls for proactive rather than reactive learning. The most successful firms recognize that training is an excellent investment with significant financial and cultural returns. So seek outside perspectives, join a peer network and encourage a learning culture firm-wide.

Don't let success make you complacent

I talked to a partner at a firm about their tax season. He shared a story about how he walked into the break room after busy season last year and heard the staff talking about how this was the best busy season ever. He corrected them: This was the best busy season *YET*, not the best ever. There is always more they can do to be even better. His mindset is that the best is always ahead, and continuous improvement is the way to keep striving for it.

Knowing what needs to be done is often the simplest part of transformation. The real work comes from putting that knowledge to work. To reap the rewards, we sometimes have to endure the tedium of repeated behaviors, even if we're not seeing immediate results. It's that ability to continue taking steps in the right direction and avoid the temptation to return to the comfortable, downhill route that sets successful firms apart.

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