



SAMPLE CASE STUDIES - 2022



Situation #1

KEY PERSON INSTRUCTIONS

ROLE – CLIENT RELATIONS

Your Role

- Self

Other Person's Role (Customer)

- CFO
- Four years in role
- Methodical and detailed
- Communicates with you primarily via email
- Delays and avoids requests until the last minute
- Q2 behaviors

Today's Meeting

You are meeting with the CFO to discuss how the previous tax season went.

Background

- During the recent tax season, this client was significantly delayed in providing needed information for their return.
- Requests for information were ignored, and when information was received, it often was only a portion of what you'd requested.
- Chasing down information meant you spent many more hours on this tax return than anticipated.
- When this individual was told that an extension would be required as a result of the delays, you received an irate call from the CFO's boss demanding that the return be submitted on time without an extension.
- For fear of alienating the CFO, you were not fully candid with the owner about the CFO's lack of responsiveness.

Objectives

1. Your goal is to gain agreement for meeting deadlines and providing accurate information.
2. You also want to outline the pricing implications if the delays reoccur.

Situation #2

KEY PERSON INSTRUCTIONS

ROLE – MANAGER

Your Role

- Partner-in-Charge of a Service Group for 6 years
- Career Advocate for a Partner whose Service Group had a break-even year last year
- The growth goals that have been identified for the upcoming year are ambitious

Other Person's Role

- A Partner on your team has been with RubinBrown for nine years.
- Was hired from a larger accounting firm before you joined the company.
- This is a highly intelligent person with strong technical and customer-relationship skills.
- Has a high regard for you and is very loyal.
- Much of the success s/he has had so far results from long-term relationships through his/her prior role, and those customers would be at-risk if the partner left your company.
- Growth will require significant additional discretionary effort to network, forge new relationships, and expand business with current clients.
- This person is slow to warm up and finds it uncomfortable to network. He/she acknowledges the importance of increasing business, yet seems to consistently get pulled into technical issues that get in the way of networking.

Today's Meeting

This is a Career Advocate meeting. Your purpose is to discuss the urgency of hitting growth targets and encourage the Other Person to take greater ownership for business development. You want this person to stay with RubinBrown and see higher performance.

Background

However, you feel strongly that had your partner been better organized and pushed his/her team harder, hitting the sales target was achievable.

There are two long-term managers on the team who are underperforming and the partner has not challenged them enough.

Objectives

1. Increase discretionary effort.
2. Commitment to a higher growth target than is comfortable.
3. Awareness of career impact of continuing to avoid business development.

Situation #3

KEY PERSON INSTRUCTIONS ROLE – MANAGER

Your Role

- Partner-in-Charge of a service group for four years.
- You have improved productivity and reduced expenses since you took over.
- You generally give your people trust and autonomy.
- Team morale is a high priority for you.

Other Person's Role (Your Direct Report)

- Manager for two years.
- Strong expertise in a practice area, where there is limited bench strength.
- Methodical and detailed.
- Superior attitude toward colleagues based on specialized knowledge.
- Has shown impatience with those who aren't quick learners.

Today's Meeting

You scheduled an in-person meeting with your direct report to address this issue.

Background

Your service group has undergone major restructuring in the last year. This manager was upset about an error made by a peer. He/she sent harsh email to that person and "copied" the other partners in the service group.

This email exchange has caused significant conflict with the peer. You have talked with this manager before about his/her abrasive behavior, but you've seen little change.

Objectives

1. To discuss this incident with the manager, find out what happened from his/her viewpoint, and reconfirm the importance of interacting with peers in a productive manner.

Situation #4

KEY PERSON INSTRUCTIONS

ROLE – CLIENT RELATIONS

Your Role

- Self

Other Person's Role (Customer)

- CFO
- Ten years in role
- Very budget- and detail-conscious
- Superior attitude, knowing that his/her company has many choices for their vendors
- QI behaviors

Today's Meeting

You have a meeting with this CFO to resolve the matter. You are aware that the CFO is protective of their time and was reluctant to schedule with you.

Background

- You have recently finished an audit project for one of your larger clients.
- This client high-profile and this is the first audit you have done for them.
- During the audit, you ran into unexpected problems with the client's records, resulting in higher-than-expected billing.

You discussed the additional time that would be needed with the client and s/he approved it, but now that an invoice has been sent, s/he is upset at the final cost and threatening to end the partnership with RubinBrown, including the tax business that you have done with them for 10 years.

Objectives

1. Find a Q4 way to understand the client's concern.
2. Repair the relationship.
3. Resolve the disputed billing.