



## **IBS INDUSTRY CASE STUDY – PROFESSIONAL SERVICES**

- Summary:** Retaining and motivating a professional team
- Industry:** Professional services (accountant/legal services)
- Goals:** Primary driver was to gain staff motivation to move from a totally autocratic way of doing business to having an empowered team.
- Business in profile:** The business was a sole trader with one principal. It has been operating for 15 years and there are 23+ professional employees. Profitability was not a challenge for the business.
- Challenges:** The morale was very low and there was high staff turnover. The management was quite autocratic and decision making was made by the principal. The business was totally dependent on the owner and there was a great potential to increase productivity.
- Strategies:** They went about defining responsibilities and KPI's. They also revisited and designed new jobs specifications for the managers. The newly defined KPI's were implemented throughout the business. Regular staff meetings were established for management and staff (went from being unplanned to having them monthly).
- Outcomes:** They are moving offices so they put together a project team with responsibility for the logistics and organisation. The team were given the responsibility and autonomy to move things forward.
- As a result of the meetings the management staff designed and implemented a continual improvement program which covered everything from flowers in reception to training, development and induction.
- After a productivity review they discovered they were undercharging for the work they were doing as it was based on historical rates rather than actual inputs. They took a dual approach to address this by reviewing pricing as well as looking at the mix of people that were employed on various projects to better match skills to assignments.
- Productivity increased and there was a dramatic improvement in staff morale.
- Process completed:** Client wants to continue working with the advisor on a retainer basis.



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