

Identifying \$130 Million in Growth Opportunities

Challenge

Wipfli ranks among the top 20 accounting and business consulting firms in the nation. They have built a solid reputation as industry experts and trusted business advisors to more than 44,000 clients across a wide range of industries. An integral ingredient of Wipfli's success has been the proactive investigation and implementation of future-facing business adaptations, including changes to their leadership development strategy. Navigating these transitions can be difficult; it requires leaving behind familiar routines and adjusting work processes, even those which had previously been successful. It also requires clear, articulate communication and employee buy-in. The risks inherent in organizational change need to be carefully balanced against the dangers of stagnation.

Before becoming a multi-service industry leader, Wipfli had to transition from its primary identity as an accounting services provider. With accounting services becoming increasingly commoditized, Wipfli had both the opportunity and need to expand their offerings. The firm set a key strategic initiative to deploy an integrated business model, one that mixed traditional accounting services with other high value offerings like consulting and outsourcing. In order to achieve this new organizational vision, the firm required a major mindset shift. They needed to shake off the complacency of narrow service delivery and devote energetic attention to growth and cross-functional selling. Knowing of Arbinger's expertise in mindset transformation and leadership development strategy, Wipfli engaged the institute to help spark and

establish their vision of a “tenacious growth culture”. In addition to spreading this shift in mindset and company identity within the partnership ranks and across the organization, Wipfli required organizational restructuring to drive the growth envisioned by leadership. In substantive ways, Wipfli needed to shift and expand its identity, culture, and practices. Eventually, these changes would create a firm reimagined.

Solution

Successfully shifting the mindset and culture of an entire professional services firm requires the buy-in and commitment of key leaders. Effective organizational transformation is deeply intertwined with effective leadership development strategy. Hence, Arbinger began working with Wipfli by spending three days in a workshop and consulting environment with the firm’s top thirty leaders. Arbinger tools were utilized to productively frame discussion around the firm’s new key initiatives. Traditional organizational practices relied on hierarchy as a default means of establishing responsibility for new objectives. With an Arbinger lens, Wipfli’s top leadership was able to clearly identify which leaders had the necessary capacities, positively impacted others, and possessed the energy to productively direct the diverse range of initiatives. This guided the reorganization process, dramatically reshaping how the firm approached the transition and laying crucial groundwork for future success. The innovative delegation of responsibility was made possible in the Arbinger-led workshop as leaders took honest self-inventory and set aside personal ambition in pursuit of organizational progress. By the end of those intensive initial workshops, the firm’s entire leadership was fully committed to realizing a tenacious growth culture through Arbinger’s ideas and methodologies.

In order to help ensure that the new tools, information, and

mindset would be fully integrated throughout the firm, Wipfli requested that Arbinger create a customized training program. The resulting training program adapted Arbinger's training and tools to the specific challenges Wipfli faced and provided employees of the firm with a common language, approach, and orientation towards their coworkers, clients, and collective mission. Within a very short time frame, this training sparked cross-functional and regional collaboration to a degree unprecedented at this stage of the firm's history.

Results

Armed with a transformed mindset and the tools to build accountability and collaboration, Wipfli was able to quickly achieve remarkable results. New levels of cooperation were reached even in the initial training session, where a contingent of company leaders identified \$85 million in client revenue opportunities for the next year. The next two levels of the organization were able to identify an additional \$44 million of opportunity. Due to their employees' immensely positive response to Arbinger's process, Wipfli enrolled twenty of their key leaders in Arbinger's train-the-trainer program. These in-house facilitators then worked to keep positive momentum building as Arbinger principles were disseminated throughout the entire firm as a key strategic initiative.

As teams started employing the new way of working, Arbinger helped capture their success stories. These became a series of customized online video clips that helped drive continuing implementation and sustainment across the organization. From structural reorganization to the redefinition of leadership roles, Wipfli continued to use Arbinger methodologies to inform their leadership development strategy. Over several years, Wipfli leveraged Arbinger's principles and tools to help sustain their growth and expansion. The firm views these changes as being key strategic differentiators in the

marketplace.

Arbinger has helped us instill in our firm an outward mindset way of working. I am convinced that this will be our differentiator in the market for years and years to come.

Rick Dreher – Managing Partner | Wipfli