

Helping KPMG account for success

The accountants of KPMG are known as some of the world's most skilled and trusted financial professionals; however, in a competitive and evolving business, it's not enough to rest on the laurels of reputation. One way the company stays ahead of the pack is by using the Myers-Briggs Type Indicator® (MBTI®) assessment to help its newest managers become as well rounded with people as they are with numbers.

"Demands have changed significantly in the accounting profession over the last decade. There's not only an expectation from our clients for expert technical advice, but there is also greater need for our accountants to have strong business development and leadership acumen," says Allison Patterson, senior manager with KPMG Canada's business school. "Our accountants have to be technical experts while at the same time managing internal team performance and multi-functional engagement teams."

To help the new leaders sharpen their skills, the company provides a year-long New Manager Program. As part of the program, an annual conference took place in January bringing together 264 accountants from across Canada who had recently been promoted to management roles.

"The focus is on leadership and business skills," says Patterson. "The goal is to help these new managers become well-rounded professionals."

Patterson says the MBTI tool, which has been part of the program for the past five years, is ideal for introducing the new managers to assessment. "For 95 per cent of them, it's their first exposure to an assessment tool. With the MBTI assessment, you get consistency and a common language; it's easy to have conversations about their results."

"We use this tool for many other programs within the firm to create consistency."

She also notes that the MBTI tool's focus on both individual preferences and interpersonal dynamics can help managers balance two of the organization's values: working together and respecting the individual.

To make this year's session as meaningful as possible for such a large number of participants, Patterson introduced a fresh format:

breakout sessions in smaller groups of about 25 each instead of a large plenary session. Psychometrics Canada also helped customize a report for the new managers to look at the aggregate of each of the preferences, which Patterson says was insightful for the group and the firm.

"We do a virtual interpretive session in advance, then a face-to-face session at the conference. Because we've got so many people from across the country, we do the pre-work so they come in with some knowledge and we can make the most of the breakout sessions."

Patterson helps participants get full value from the hour-long MBTI session by making sure what they learn is woven throughout the conference. As a call to action, she also has them each write a "letter to myself" describing how they'll put what they've learned into practice, which she then sends them two months later as a reminder of their commitment to themselves.

Judging from post-session feedback and follow up emails from the breakout groups, Patterson says the MBTI sessions were well received, and she appreciated the energy the participants brought to the table. Several said they appreciated the eye-opening insights they gained about themselves and about how people relate in teams.

Patterson says the firm's partners have also endorsed the program: "The continued dedication of time and budget it receives is encouraging." She points out that delivering the MBTI sessions in-house is not only cost-effective, but also effective at building ongoing enthusiasm for the program.

SEAN TOWNSEND

Allison Patterson has more than 15 years' experience working with global clients in a variety of industries including professional services, pharmaceuticals, financial, government and Crown corporations, and educational institutions. Allison has led and managed large multidisciplinary project teams in areas such as franchise shaping, sales force effectiveness, key account management, product and disease knowledge, talent management and managed health care. She holds a bachelor of applied science degree with honours and a master's degree in education, and designations including the CTD, CMC, Kirkpatrick Certification and CMP. Allison is currently board chair for the Institute for Performance and Learning (formerly known as Canadian Society for Training and Development).

The Myers-Briggs Type Indicator is available from Psychometrics Canada at www.psychometrics.com