



We'll get you there.

CPAs | CONSULTANTS | WEALTH ADVISORS

The Prominent Partner: Bridging Management and Leadership



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Our Path

- ✓ Management and Leadership History
- ✓ Gap Filled by Partnership
- ✓ Being a Prominent Partner





Management and Leadership History



Management and Leadership History:

Three *Management* “Ages”



Source: [Management's Three Eras: A Brief History \(hbr.org\)](https://hbr.org)



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Management and Leadership History:

Leadership “Ages”



Source: [sagepub.com](https://www.sagepub.com)

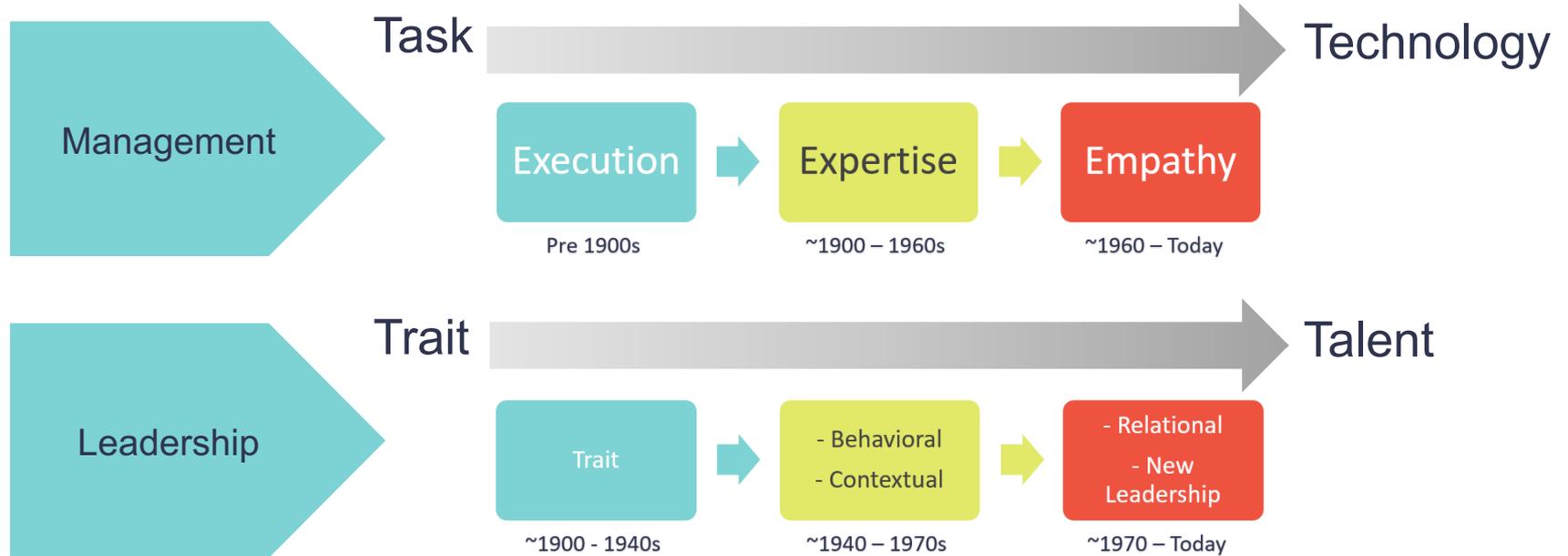


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Management and Leadership History

What do we to make of this?





Gap Filled by Partnership



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Gap Filled by Partnership

Source: **CLAgpt**

Management

- About planning, organizing, and controlling resources
- Focus on coordinating and overseeing tasks, processes, and people
- Formal authority and responsibility within a hierarchy
- More task-oriented.

Leadership

- About inspiring and motivating others
- Sets direction, creating a vision, guiding and influencing
- About people and relationships
- Take risk, think strategically, encourage innovation and creativity
- Not limited to a specific role or position.



Gap Filled by Partnership

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GAP

Partnership



The Partnership Gap (Simplified)

Management

- Behaviors that deal with or controlling things, processes, or people.

Leadership

- Behaviors used to set align direction.

GAP

Partnership Traits





Being a Prominent Partner



Being a Prominent Partner: Essential Traits

- Observant
- Clarity Seeker
- Conscience



Being a Prominent Partner: Essential Traits

- **Observant**
 - Clarity Seeker
 - Conscience
- ✓ See and Hear
 - ✓ Resists Personal Bias
 - ✓ Looks for Connections
 - ✓ Timely Observations.

Gap Filled by Partnership



Being a Prominent Partner: Essential Traits

- Observant
 - **Clarity Seeker**
 - Conscience
- ✓ Draws out “wants”
 - ✓ Listens for “the Challenge”
 - ✓ Listens for “core need”
 - ✓ Reflects what was heard.

Gap Filled by Partnership



Being a Prominent Partner: Essential Traits

- Observant
 - Clarity Seeker
 - **Conscience**
- ✓ See and Hear
 - ✓ Acknowledges trade-offs
 - ✓ Asks what help needed
 - ✓ Confirms takeaways.

Gap Filled by Partnership



Gap Filled by Partnership

Management

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Partnership
Observant
Clarity Seeker
Conscience

Leadership

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How Strong of a Prominent Partner Are You?

- Observant
- Clarity Seeker
- Conscience





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Thank you!