

**BRINGING IN A NEW PARTNER
THRESHOLDS
AND
CORE COMPETENCIES**

Intangibles

1. **TRUST. Integrity, honesty and sound ethical behavior/judgment**
2. **Credibility with partners and staff**
3. **Encourages client confidence: Clients are comfortable calling the partner-potential first rather than the originating partner.**
4. Strong work ethic
5. Loyalty and commitment
6. **Team player**
7. **Able to pass the "beer/wine" test**
8. Communication and interpersonal skills
9. Leadership skills

Financial and legal

1. **Is willing and able to buy in**
2. **Is willing to take on retirement obligation**
3. **Is willing to sign a non-solicitation agreement**
4. Demonstrates personal financial stability

Practice development

1. Originates X amount of business
2. Constantly pursues meetings with clients, prospects and referral sources to get new business
3. Actively seeks opportunities to cross-sell additional services to existing clients
4. Has been active for at least several years in building up network of business contacts
5. Has distinguished him/herself as an expert in at least one service or industry

Production and client management

1. **Manages X number of clients (billing, relationship and engagement management)**
2. **Achieves X billable hours...**
3. **...at X realization**

Technical

1. Demonstrates a high-level of analytical and problem-solving skills; solves clients' problems
2. **Exhibits high level of technical skill so the firm is comfortable that once the partner candidate has finished a client project, no one else needs to review it to make sure it was done right. Candidate has proven his/her ability to complete highly technical projects with minimal assistance from others.**

Supervision

1. **Has solid experience supervising staff**
2. Is a delegator
3. Is able to develop others

Administration

1. Follows and complies with all firm policies, procedures and deadlines