



ANDERSEN
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Straight Thoughts, Straight Talk

"Serving Andersen Alumni Worldwide"

Jul. 2025

Vol.18 No.3

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Editorial

In the United States we recently celebrated the Fourth of July—a moment to honor our nation's founding and the freedoms we sometimes take for granted. Amid the fireworks and flags, it's worth reflecting on the deeper meaning of this holiday, especially in a time when our country feels more divided than united.

As alumni of a firm that valued clear thinking and honest dialogue, we remember the importance of the Andersen mantra: *Think Straight, Talk Straight*. It's a call not just for professional integrity, but for civic responsibility. Speaking plainly, listening openly, and seeking truth, these are the habits that build trust in teams, in companies, and in a country.

Today, we wrestle with sharp differences in values and vision. But we must remember: *United we stand, divided we fall*. It's not unity of opinion that makes us strong, it's unity of purpose, rooted in respect.

For me, that purpose is captured best in the second to last sentence in my collegiate alma mater's creed, the [Auburn Creed](#): *"I believe in my Country,*

because it is a land of freedom and because it is my own home, and that I can best serve that country by doing justly, loving mercy, and walking humbly with my God."

As we move forward, may we carry that spirit—with humility, with courage, and with straight talk.

Lastly, we need your help to further strengthen and maintain our Andersen Alumni network. Please leverage our Social Media Presence and [LIKE our Facebook page](#) and [JOIN our LinkedIn network](#), and lastly you can [FOLLOW us on LinkedIn](#) as well.

As Always Think Straight Talk Straight....

[Warren Turner](#)
Editor

Alumni On the Move

[+ Follow](#) us on our LinkedIn Company Page for the latest information on fellow alumni on the move.

If you have recently changed jobs and would like to share your good news with other Alumni, please email details to Admin@andersenalumni.com

Congratulations to the Following Alumni and Best Wishes in your new roles.



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Disrupters See the World Differently – and Act Accordingly

By Jim DeLoach, *Former Andersen Partner and Founding Managing Director at Protiviti.*

He is the author of several books and a frequent Forbes and NACD contributor.

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Critical differences in culture, technology adoption and talent strategies determine which organizations shape markets and which scramble to respond

As past and current events continue to remind us, disruptive change is a reality. Protiviti's Jim DeLoach examines new global research revealing that while disruption is universally recognized, organizations respond from radically different positions.

In Protiviti's second annual global board governance survey [report](#), conducted with BoardProspects and Broadridge Financial – over 75% of more than 1,800 board members and C-suite executives noted that their organizations expect major business model changes within three years. In a recent webinar, my colleague, Frank Kurre, asked the over 700 participants for similar feedback and a higher percentage (82%) responded the same.

Our survey also revealed that only 15% of organizations consider themselves to be disruptive leaders in transforming their industry or creating a new industry. Our webinar participants reported a lower percentage – 14%.

These and other results suggest that as far as the speed and impact of disruptive change accelerating are concerned, most everyone gets it. As markets evolve, so must companies. It's the law of the competitive jungle: Disrupt or be disrupted.

The disruption continuum

No company can claim immunity to some form of disruption. For example, the recent “reciprocal tariffs” levied by the US are highly disruptive to many companies’ supply chains. So was the Covid-19 pandemic. However, just as some companies managed the impact of the pandemic on their operations better than others, such will also be the case in the present chaotic trade environment.

With this hypothesis that not all companies are alike, we introduced a disruption continuum consisting of five levels of maturity – disruptive leaders, disruption aspirants, vulnerable disrupters, agile followers and disruption laggards. We then invited our global survey respondents to indicate their organizations’ position on this continuum. The survey found that almost 50% of companies identify themselves as at risk of disruption.

Disruptive leaders transform industries with innovative solutions, business models and customer experiences. They create sustainable business models with strong economic moats that enable them to protect their market share and profitability through unique offerings, financial strength, talent access, scale, brand differentiation, low-cost positioning and high switching costs. Achieving this advantage requires vision, an aligned culture, capital investment and some luck. Disruptive leaders challenge and displace incumbents, transforming customer experiences. Examples include Amazon, Netflix, Uber and Airbnb, as well as Apple’s introduction of the iPod and iPad.

There are two other categories of disrupters – disruption aspirants and vulnerable disrupters.

Disruption aspirants view themselves as disrupters and are making progress at becoming more disruptive. They are proficient in disruptive innovation but are not recognized by the market as disruptive leaders. It takes time, capital and patience to build the foundation to become a disruptive leader. Today’s undisputed global leader in chipmaking, Nvidia, required many years to acquire and develop the foundational elements on which its present GPU product offerings are based. The company’s patent portfolio covers a wide range of technologies, ensuring that every component of its AI-optimized GPUs remains proprietary.

Vulnerable disrupters view themselves as disrupters but are also at risk of being disrupted – a paradox of sorts that highlights the dynamic and often precarious nature of innovation and market leadership. These companies are equipped to compete and adapt to changes in the market, but their vulnerabilities necessitate a proactive approach to anticipating potential threats posed by innovative competitors or other emerging disruptive forces. They must innovate constantly

and sustain relationships with key alliance and ecosystem partners to maintain their edge and market positioning.

Agile followers are at risk of being disrupted but are quick to pivot and adapt. They respond to sudden, high-velocity events as well as recognize disruptive trends early and pivot decisively in response to these trends. They choose not to assume the risk profile of a company pursuing first-mover advantage. Instead, they opt to wait and see regarding trends and solutions that interest them and learn from the mistakes of first movers, refine their offerings and potentially enter the market with a more mature and competitive product or service.

Apple's iPhone launch in 2007 and Google's Android launch in 2008 are examples of "second-mover advantage," as they disrupted the mobile phone market, leading to the downfall of incumbents like Nokia, Blackberry, Palm and Sony Ericsson. Thus, agile followers can compete, win and sustain relevance by responding to market developments and leapfrogging first movers that fail to adapt to changing user preferences. Apple's success with various products shows that companies with disruptive leader attributes can also choose to be effective agile followers.

In addition to being at risk of being disrupted, disruption laggards are slow to evaluate how to react and respond. This is not the preferred profile in an environment of rapidly changing markets. Think Blockbuster, Borders and Sears. Our survey noted that 15% and 34% of the respondents categorized their organizations as disruptive leaders and disruption aspirants, respectively. In addition, 25% and 16% categorized their companies as vulnerable disrupters and agile followers, respectively. Finally, 7% were disruption laggards and 3% indicated "Not sure."

Change is the norm

The half-life of organizational business models is shrinking. Companies arrayed across the disruption continuum expect their business models to undergo moderate to significant changes within the next 36 months. Market factors like technological advances, geopolitical shifts, evolving customer experiences, regulatory changes, economic volatility and disruptive innovations are driving companies to modify their business models more frequently than ever to sustain their competitive position and relevance.

In this environment of changing business realities, not everyone can be a leader. Furthermore, as noted earlier, not everyone wants to be a leader. Companies are different. Agile followers can successfully navigate disruption by leveraging their strengths and embracing innovation with a strong customer focus in responding to disruptive change driven by leading market players. However, *every* organization can learn from what disruptive leaders do differently.

Disrupters are more confident in their resiliency

Confidence in a company's ability to respond to changing markets varies. For example, an organization's perceptions of its level of resilience and ability to respond timely to market disruptions are shaped by how it views itself as either a disrupter or a business subject to disruption. From their agility and innovative culture to their views on external factors that can disrupt the enterprise, disruptive leaders are better prepared to embrace change. On the flip side, organizations that classify themselves as at risk of being disrupted view their organizations as less agile and see talent and culture as barriers to anticipate and stay ahead of waves of disruptive change.

Disrupters focus on differentiators that matter

In creating and shaping disruption, the key areas of focus for disruptive leaders are:

- Delivering superior customer experiences through business model innovation.
- Building superior infrastructure and capabilities to scale new products.
- Differentiating market offerings through significant pricing or quality advantage.

Disruptive aspirants share these top three areas of focus, though they rank differentiating market offerings ahead of building superior infrastructure and capabilities. Disruptive leaders introduce novel solutions significantly different and more robust than what currently exists and often target underserved or new markets, gradually improving their offerings and scaling their operations to attract mainstream customers. They are relentless in focusing on the customer and do not permit an inward-looking obsession with process or functional excellence to obscure that focus.

Disruptive leaders are committed to technology modernization

All survey respondents, regardless of their organization's disrupter status, rate the accelerating pace of technological advancement as their most significant concern in terms of external factors that may disrupt the company's strategy and business model. Whether an organization leverages technological disruption as an opportunity or scrambles to mitigate its negative effects depends heavily on the sophistication and agility of its technology environment.

Views on the pace of the organization's technology modernization efforts are telling. Among disruptive leaders, a strong majority (72%) have a high level of confidence that they are modernizing their technology infrastructure at a sufficient pace to address disruption risk, vs. 37% of all other organizations. For disruption laggards, this level of confidence percentage is a mere 12%. This is a differentiating factor that cannot be ignored in a disruptive world.

As a sidelight, technical debt is the cost and magnitude of additional rework caused by the cumulative effect of choosing technology solutions that are easier to implement over the near term rather than the best overall solution for the long run. Disruption laggards are more than twice as likely as disruptive leaders to view excessive technical debt from legacy technology infrastructure as the most significant barrier to responding to disruption in an agile manner.

Disruptive leaders view generative AI as an opportunity

Generative AI is a disruption in which outsized impacts swing from game-changing to extremely damaging, depending on an organization's perceived disruption status. Most disruptive leaders (72%) approach and leverage generative AI as an opportunity, while more than two in five agile followers and disruption laggards, as a group, view generative AI as a substantial threat to their business.

The adoption and operationalization of generative AI tools now yield major productivity improvements as new forms of agentic AI (AI systems that go beyond responding to individual queries to analyze challenges, develop strategies and execute high-volume tasks simultaneously without continuous human intervention) appear poised to deliver even more sweeping value. This combination of opportunity and risk makes it an imperative for the board and the C-suite to devote sufficient time and attention to disruption risk while fast-tracking the integration of technology with the appropriate risk governance and enterprise risk management programs.

Talent and a resilient culture are key differentiators

For disruptive leaders, the perceived market barriers to advancing their disrupter agenda or responding agilely to disruptive events are regulatory constraints along with capital and/or resource constraints for research and development. But it's a different story for disruption laggards. For them, lack of an innovative culture or the talent needed to stimulate creative thinking, as well as resistance to change within the organization, are the top barriers.

These results reveal stark differences between disrupter organizations and those susceptible to being disrupted. Consider the innovative culture barrier, for example. Half of disruption laggards (50%) view this as a significant barrier to agility and disruption, vs. just one in 10 (11%) disruptive leaders. There is a similar disparity in the responses related to organizational resistance to change.

Bottom line, the keys to being a disrupter and having the capability to respond agilely to market events lie in talent, culture and embracing change. This point is important to keep front and center as directors and senior executives focus on the quickening pace of change and the unique organizational disruption risks that accompany it.

Summary

Our survey results offer insights regarding certain characteristics distinguishing organizations along the disruption continuum, including comparison of disruptive leaders with all other organizations. Because it is not possible for everyone to be a disruptive leader, we are not suggesting that all organizations need to be alike. As we noted earlier, agile followers can be successful if they make good data-driven decisions and pivot timely.

A company's susceptibility to being disrupted depends on how vulnerable it is to potential change or disruptive market forces. In today's optics, clinging to the status quo is dangerous. Since everyone can learn from what leaders do, we recommend that organizations take a pause and consider opportunities to improve how they manage inevitable change in the marketplace, both as an opportunistic disrupter as well as an agile responder to disruptive trends and events.

We encourage everyone to review our [global survey](#). It includes relevant questions for directors and senior executives to consider based on the survey's key takeaways. The questions are organized in several categories, consistent with our presentation of the survey findings:

- The strategy and business model.
- AI and other technologies.
- Technology modernization.
- Barriers to being a disrupter and responding to disruption.
- Agility and resilience in responding to disruption.

The questions emphasize the changing business realities that require senior executives and directors to stay closely connected to the marketplace; recognize when change is necessary based on reliable, insightful data; and act decisively to drive the necessary change within their organizations in a timely manner. We hope that our research will stimulate leaders' thinking as they assess the competitive landscape, potential disrupters and their desired positioning on the disruption continuum.

[Jim DeLoach](#), a founding Protiviti managing director, has over 35 years of experience in advising boards and C-suite executives on a variety of matters, including the evaluation of responses to government mandates, shareholder demands and changing markets in a cost-effective and sustainable manner. He assists companies in integrating risk and risk management with strategy setting and performance management.

Stronger You, Stronger Us

By Ralph Schonenbach *Former Consultant Andersen Business Consulting , Founder and CEO of Meerkat, Inc.*

The world feels heavy sometimes. News cycles, deadlines, the sense that everyone's rushing but no one's really connecting. I feel it too, like a weight pressing on my chest.

I've learned that the best way to lift that weight is to start with myself. As I wrote in *Relationships Matter*, healthy relationships begin with a healthy sense of self. If I'm not steady, I can't be there for anyone else.

Here's what I do to make sure I'm the person I'd want by my side:

1) Time Alone

I carve out space for quiet. A slow breakfast while the sun creeps in through the window. A walk without my phone. Time to let my thoughts settle like leaves drifting to the ground.

2) Fitness

When I'm not moving, my confidence dips. I make it a point to get my heart beating every day, even if it's not the gym routine I used to do. It's about energy and reminding myself that I'm alive.

3) Writing

Sometimes on paper, sometimes in conversation with ChatGPT, writing helps me untangle the mess in my head. It's my way of sorting out what matters so I can bring my best to the people who matter.

4) Engaging with People

I reach out even when it feels like I don't have time. A quick note, a call, a comment on someone's post. Connection can make even the heaviest days a little lighter, and I want to be that for others, too.

5) Staying Positive

Shit happens. It always will. I remind myself that I have today, and that's enough to smile about. Even a small smile can ripple out and lift others.

I do this work not because it's easy but because it's necessary. Being someone who lifts others starts with lifting myself. Each step I take to care for myself makes me stronger, more present, and more able to show up when others need it most. That, to me, is the heart of building deeper, lasting connections.

[Ralph Schonenbach](#) is an entrepreneur, author, and relationship expert with over two decades of global experience. As the author of [Relationships Matter](#), he offers practical strategies to foster meaningful connections, combining deep personal insights with actionable advice. With a strong consulting, leadership, and product development background, Ralph has helped individuals and organizations enhance their networks and achieve lasting success. Passionate about personal and professional growth, he enjoys writing, international travel, and meeting new people, continuously advocating for the power of relationships in creating impactful opportunities.

America, My Country and I Love It

By Ed Maier, *Former Andersen Partner*

I read an article recently by a writer I respect. He wrote about why he loves America. I challenged myself to think about that, and I have, no doubt, the same conclusion. I love my country. I am proud to be an American. I am thankful for the many gifts given to me because of the privilege of being an American.

I grew up in a typical big city neighborhood on the South side of Chicago. I attended church-related grammar and high schools. I had no fear walking back and forth to either of those schools as I grew older. I also played sports and other kids' games, freely and unafraid, during both day or nighttime hours, in our streets and on our playgrounds. My parents were the ones who chose the schools I would attend. No one in their lives—relatives or friends, church or government representatives—decided which schools I would attend or mandated that I do so.

When I graduated from high school, I applied for college and was accepted to one that I selected. It was my choice—not anyone else's. I was not shuttled to a different school because of my economic and social status or because of my political or religious beliefs. Upon completion of my studies, I applied for work with several professional accounting firms as that was my chosen field. I received offers of employment and picked the one that I felt was the best for my future growth and development. Once again, I emphasize it was my choice. I was not limited by my economic status, religious beliefs or government alliances.

While attending university, I voluntarily enrolled in the Reserve Officer Training Corps (ROTC). I did so with the full knowledge that this enrollment and the benefits I received from it came with a commitment to devote a certain portion of my life to military service. I made this choice because my father and several of my uncles served in the military. Our family believed that one of our responsibilities for growing up in our nation was to serve our country. There was no governmental mandate that I do this.

Near the end of my college work, I fell in love with a wonderful woman. We were married shortly after I completed my military service and returned to my professional career. We have been together for many years, raised one child to adulthood who now has his own family. Throughout that process our choices, mistakes and decisions have been ours. Other than being law-abiding citizens, we have never been forced to do anything, live anywhere, work in any field or participate in any activity against our will.

I had a successful professional career. I believe that success was a result of my own efforts.

After my retirement from the accounting profession, I was able to work for many years in the field of executive coaching and business consulting. I chose to do this on my own and I had the freedom of choice to do so. The only limitations to any success I had in either of these careers were my own. There were no roadblocks placed in front of me because of my background, social or economic status.

In my professional career, we had the opportunity to live in three different parts of the country. We always felt welcomed into the social and professional circles of the neighbors and friends we met. We associated with people because we wanted to, not because it was mandated that we had to do so. In addition to living in these places, we had numerous opportunities to vacation around our country, see many of its sights, take in the beauty of its nature and share meals and activities with many of its people. To do so, we never had to provide identification papers, cross a roadblock or explain to some military or police person the nature of our business.

We also had the opportunity to travel to other parts of the world. We visited many foreign cities and countries, met many wonderful people and learned many new things about life around the world. No one from America—in the government or any other agency—investigated why we were traveling outside our borders or inhibited our ability to do so. We were not restricted to go anywhere we wished to go.

Throughout my life in this wonderful country, I followed its laws and regulations because I respected them and because that is what I was trained to do. As long as I have operated within those parameters, I have been able to choose what I want to do without fear, concern or retribution. The places where I live, the clothes I wear, the food I eat, the sites that I visit, the people I make friends with, the beliefs I hold are all my choice.

If I conduct myself in an appropriate, professional and courteous manner, I can have conversations with relatives, neighbors and others with whom I might have differences of opinion. I can do so without the threat of retribution by any professional or governmental agency.

I can live my life this way because 250 years ago, fifty-six brave citizens signed a document called the Declaration of Independence. Shortly after, many of them participated in the writing of the United States Constitution and the Bill of Rights. These Founding Documents established the guiding principles for where and how I have been able to live my life. And I am deeply thankful to them for it. I love this country.

I read these Founding Documents on occasion. I recommend that you read them also. I don't know what subjects children study in school these days. But if you have your own children, I think you should share these Documents with them and discuss what they mean. They should have some basic knowledge of them. They should also know how their lives have been shaped and affected by them.

Now if you ask me if I like this country, I will say that sometimes I do, sometimes I don't and sometimes I am not so sure. There are things that happen in the government, in business, in society that I don't like. Many of our people in various walks of life do things that I don't like or don't agree with. But as long as they follow the laws of our country and they do not interfere with my rights to live here, they can behave as they wish.

But for my seventy-eight years, the likes I have for this country far outweigh the dislikes. And I still love her, this America.

As always, I am interested in your thoughts. Feel free to write to me at edmaier46@gmail.com. And, if you enjoy my writing, you can read more of it in my book *Think Straight, Talk Straight*, which you can find on Amazon right [here](#).

How Strong Leaders Lead Through Restructuring and Downsizing

By Jennifer Eggers, Andersen Alumnus and *Founder & President of LeaderShift Insights®*

If it feels like the waters have gotten rougher lately, you're not alone.

Across industries, executive teams are navigating waves of uncertainty. Budgets are tightening. Teams are shrinking. Leaders are being asked to do more with less, move faster with fewer resources, and maintain morale amidst layoffs and restructuring. It's no wonder many find themselves exhausted, frustrated, and wondering if growth is even possible in this climate.

Here's the truth: It is possible. But it doesn't happen by default.

Growth in turbulent times requires a new kind of leadership. One that's adaptive, strategic, and able to align people even when the path forward feels unclear.

This is what I call leading in choppy waters.

And if you're a senior leader right now - especially one navigating restructuring or downsizing - your ability to drive clarity and engagement in uncertainty may be the single most important skill you can cultivate.

Let's talk about what that really means.

What Leaders Get Wrong in a Restructure

When companies restructure, the focus often goes to operational design - a headcount, reporting lines, org charts. And while those are critical levers, they're not what gets teams rowing in the same direction.

Leaders often forget that restructuring doesn't just change roles, it changes how people see their future, how they work together, and what they believe is possible.

Here's what I've seen repeatedly in restructuring environments:

- Silos deepen as people become more protective of turf
- "Survivor syndrome" sets in as remaining employees experience guilt, fear, and distrust
- Strategic priorities get diluted as leaders focus on maintaining status quo
- Middle managers are left holding the change without tools to lead through it

In other words, organizations lose alignment just when they need it most.

The Misstep You Might Not See

If you're reading this, there's a good chance you already feel it. Your team may be showing up, but they're cautious. They're checking boxes. They're not taking the kind of ownership that drives innovation or growth.

You might think: "I've explained the strategy."

But communication alone isn't leadership. And clarity doesn't automatically create commitment.

That's where most leaders get stuck: they think they have an execution problem when they actually have an alignment problem.

And that's not on your team. It's on how you lead through turbulence. So the question becomes: Are you doing the right things to lead your team in rough waters?

Resilience Is a Team Sport

The leaders who drive results during restructuring aren't the loudest or most charismatic. They're the ones who ask the right questions:

- What am I doing to signal direction when plans change by the day?
- Am I surfacing ideas and innovation, or shutting them down by accident?
- Are my people clear not only on the what, but on the why?
- Am I creating space for all hands on deck, or trying to carry it all myself?

These leaders don't just tell people to "lean in." They build systems of engagement that empower their teams to act.

They lead with clarity, not control. They foster collaboration, not compliance.

They remove friction so progress can happen - even when the environment is challenging.

They know that resilience isn't about bouncing back. It's about adapting forward, together.

Your team is watching. They're waiting. They want to contribute.

The question is: will you lead them in a way that lets them?

To traction, not turmoil,

Jennifer

[Jennifer Eggers](#) is a C-Level advisor and President of LeaderShift Insights, Inc. She works with leaders and organizations going through disruption to improve their capacity to adapt. This is an excerpt from Jennifer's new book, coming this summer from Best Seller Publishing. The working title is "Mastering The C-Suite Mindset: A playbook for transitioning into the C-Suite". The book is based on 30 years of patterns observed while working with and coaching C-Suite leaders across 16 countries and over 25% of the Fortune 500.

Stakes Around Talent and Leadership Shift from Important to Critical

By J. James O'Malley, Former Andersen National Director of Experience Recruiting, Jim is Managing Director at Kensington International Executive Search

When private equity firms put capital into businesses whose greatest asset is people—think professional services (Accounting, Advisory, Tax, Law Firms, Engineering Firms, creative agencies, Specialized Consultancies)—the stakes around talent and leadership shift from important to critical. In product-driven

companies, operational improvements and market positioning can generate returns even if people turnover is moderate. But when your “product” is the knowledge, relationships and judgment of your workforce, every leader departure or high-performer flight carries a direct cost to revenue, client satisfaction and ultimately, the firm’s valuation. Here are some considerations for PE leadership to consider.

1. The due diligence phase must evolve. Beyond financial models and market analyses, PE sponsors need rigorous assessment of leadership bench strength, cultural health and succession pipelines. Can the current partners or senior team continue to win client trust five years out? Are there emerging stars ready to step in? Traditional PE playbooks often assume that post-acquisition leadership can be installed from outside; recruiting for Pro-Services is quite different than product driven porticos. And working with the same executive recruiters could be a mistake, @Kennsington we have a dedicated professional services team.
2. Value creation planning must prioritize leadership development as a line-item investment. Training programs, coaching and structured career-path frameworks are not “nice to have”—they are deal enablers. When firms allocate capital to technology upgrades or geographic expansion but neglect leadership cultivation, they undercut their own growth strategies. High-potential partners need targeted support to build management skills, foster inclusive cultures and adapt to rapid change. In my experience placing C-suite and practice-head roles, firms that budget for ongoing leadership-acceleration initiatives see measurably lower attrition and higher EBITDA multiples at exit.
3. You have heard me talk about compensation and governance structures requiring. Equity incentives are standard in PE-backed models, but in people businesses these must be carefully designed to reward collaborative behaviors as much as individual billable hours. Too often, share-vest schedules ignore the time horizon necessary to embed a coaching culture or to break down silos across practices. Thoughtful governance—such as joint leadership councils with PE representation and rotating chairmanship among senior partners—can align long-term vision without stifling entrepreneurial drive.
4. Finally, the human dynamics of change management become front and center. Acquisitions introduce new performance metrics, reporting rhythms and growth targets. Without empathetic, credible leaders who can translate these shifts into a compelling narrative for staff, anxiety spikes and retention plummets. PE firms must therefore back not just the business plan but also

the internal narrative—equipping leaders with communication toolkits, listening forums and data dashboards that track both financial KPIs and talent metrics (turnover, engagement, promotion rates).

In sum, when people are the product, talent leadership is no longer a supporting act; it is the main event. Savvy private equity investors will treat leadership development, cultural alignment and succession planning as non-negotiable pillars of their investment theses. Those that do will unlock far greater value—and avoid the hidden risk of watching their most precious assets walk out the door. We can help, DM me if you would like to discuss.

[J. James O'Malley](#) is a managing director at Kensington International Executive Search. For 30+ years, Jim has developed talent acquisition solutions to ensure that leadership talent aligns with changing business needs. Jim has served: Private Equity and their portfolio clients across all industries in addition to his background with Management Consulting firms, Architecture, Engineering, Accounting, Tax and Law firms in addition to IT, Healthcare, Operations and Supply Chain consultancies. He also helps large Commercial, Consumer and Private Banks with their hiring needs. For more information and to contact Jim at: Jomalley@ki-search.com

If You Can't Change the People, Change the People

By Gary Thomson, Andersen Alumnus and currently a Managing Director at Thomson Consulting

What do you do when you've promoted a talented and valuable professional to a leadership role, and it just isn't the right fit?

I once worked with a firm that promoted a successful partner into the COO role. This respected audit partner also sat on the firm's executive committee. If you've caught on to the theme of this article, you may have guessed that this individual was not the right fit for this role. He possessed the skills of a great audit partner; however, these skills did not translate as well to the COO role.

So, what do we do now?

Eight years later, I came in to help and asked about their most significant issues. The number one issue I heard was not getting reliable data analytics and necessary information to run the firm. As a result, other leaders spent time finding or creating this information. It was disruptive and inefficient. It was obvious the COO role, was not a good fit for this person. So, I asked them, at this point in the game, is this individual able to change? I got a universal no. I spoke

with this individual, and it was clear that he knew he wasn't the best person for this job, but there was pride in having the title.

When you confront a situation like this, it comes down to whether you need to change who is in the role if you can't change the person.

Which is precisely what we did. The decision was made to transition this person out of the COO role and bring in someone else. Thankfully, in this case, the individual was willing to be a part of framing this transition, and he took the opportunity to do what he was great at - being an audit partner.

In the end, things turned out great for all parties involved. So, this leads me to the point of this story. As firm leaders, we may inadvertently put the wrong people in the wrong positions. It happens. How you handle the issue, though, is what is important. If it's been determined that the person cannot or is not willing to change, then you must change the person in that role.

Having the wrong person in a leadership role can be extremely damaging to a firm. It can cause a lack of efficiency, disconnect between teams, staff frustration, and, ultimately, staff turnover.

Don't let the wrong decision hinder your firm. Reach out to me if you need help redefining your leadership roles.

If I can help you or your firm with change management feel free to reach out to me gary@thomsonconsulting.com

The Ugly Side of Leadership

By Todd Dewett, *Andersen Alumnus, author and speaker*

Leadership is a noble pursuit. After many years of study, practice, and pontificating, I still believe this to be true. Do you know what else is true? There is often as much downside as there is upside. It can be ugly.

The upside includes all of these and more: a feeling of accomplishment for having earned a promotion, the joy of working with the team to accomplish goals, the satisfaction of helping others grow, increased status and power, and improved compensation. However, the downside is real too. In fact, how much upside you create is meaningfully determined by how well you manage and cope with the downside.

The often-unexpected downside includes:

You receive NO IMMEDIATE RESPECT. It is not the case that you are promoted and people begin to throw flowers at your feet as you walk by. People do not begin to blindly listen to all the wisdom you think you are espousing. They really

don't have the ability to judge you just yet. You must build new relationships and get to work. You must earn their respect.

That's why you must remember to put TEAM BEFORE SELF. On the one hand, you're in charge. On the other hand, try not to act like it. You have authority, but you'd rather get things done through trust and cooperation. One clear way to support this choice is to remember to always take the blame and share the credit. When the team makes a mistake, you step up and own or co-own it, with no blame in sight. When you and the team have a big win, share the credit widely with the team. If you want to hog the limelight, feel free. Just don't expect a great team.

Here's one big reason you care about your team: sometimes your decisions don't matter as much as you think. EXECUTION IS EVERYTHING. A mediocre decision carried out by skilled operators can have strong results. A killer decision acted upon haphazardly by an apathetic or a skill deficient team will surely fail. So use a few of my favorite rules to begin building a connected and productive team: collaborate, don't dictate; authenticity, not acting; be the change; not the boss (these and more from my latest book *Dancing with Monsters*).

The challenge is that sometimes you're not ready to lead because YOU DO NOT YET HAVE THE RIGHT SKILLS. The skills that make you successful as an individual contributor are not at all the same as the skills that make you an effective manager. First, you will need to build a deeper understanding of how the business works. Next is the really hard part for many professionals: building new communication and people skills: speaking with clarity and purpose, listening effectively, mediating conflict, showing empathy, motivating performance, etc. Congrats on your promotion but get ready for a new steep learning curve.

Oh, by the way, now YOU LIVE IN A GLASS HOUSE. You are under constant surveillance! Not because you are a suspect in a crime, but because your work is now interdependent with the work of many others. There are many moving parts in an organization and you're now one of them. As a result, lots of people are watching you, via: data about your team and their work, your reports and presentations, what you say at meetings, and so on. So don't be surprised when you see the next set of prying eyes.

Does this all sound like a lot? It is. That's why LEADING IS STRESSFUL. Why bigger scrutiny? Because you are new. Because you have bigger responsibilities. Because your performance affects the standing of your team members. The stress is real and as it builds it impacts all your relationships, professionally and personally. So, stress must be managed. And I want you to have your eyes open. Typically, as you climb the ladder higher the stress gets worse - sometimes a lot worse. Do not let it surprise you.

What do you get for all this extra stress? The accolades, the pay, helping others improve - all wonderful benefits for sure. However, one of them is not more time off. The reality is that MORE SUCCESS REQUIRES MORE SACRIFICE. Time is often the biggest sacrifice. Time with your spouse, family, friends, children, your hobbies, and everything not work will decline. Is that fair? People like to debate that question, but it is usually true. In some ways you must also sacrifice time at work. Instead of working on your analysis of this and your decisions regarding that, you now must spend significantly more time coaching your team and building and maintaining relationships that will be key the key to your success.

Did I mention that sometimes EMPLOYEES ARE CRAZY? Well, only a few are actually crazy, but many seem that way since we are all very busy, often selfish, and in terms of personality and needs, we are quite different. The real challenge here is twofold. First, remember that they are your responsibility. No matter how you feel about a single individual or the group, you must find the positive perspective and engage. Second, remember to coach based on their needs, not some one size fits all approach. Some will need no real coaching, some need a little, and a few will need a lot. They are the hand you were dealt so get to work attempting to maximize their capabilities.

Given these challenges, it's not hard to see why IT'S LONELY AT THE TOP. Leaders commonly report feeling lonely. They feel terribly exposed to others (glass house effect) and yet not so supported or understood. Everyone needs a lifeline or two. My advice is to always have at least one person at work who can talk you off the ledge and one person outside of work who can fill the same function. Don't dwell on your loneliness. Do something about it. Pay attention to your stress levels, don't abandon your health, know where to go to find a much-needed smile (e.g., a funny friend, a favorite movie or song), and definitely use one or both of your lifelines to connect to a little positivity and empathy.

The feeling of joy you derive from experiencing the upside of leadership is deep and fulfilling. It must be, or why would anyone continue to take on the challenges noted above? If you know these challenges exist, you're brave enough to talk about them (e.g., peers, mental health professionals), and you're brave enough to manage them as noted here - you're going to develop your own helpful tactics and routines. As long as you can still believe that the experience of leading is a clear net positive, that means you're doing a great job managing the downside. Congrats - keep leading!

[Dr. Todd Dewett](#) is one of the world's most watched leadership personalities: a thought leader, an authenticity expert, best-selling author, top global instructor at LinkedIn Learning, a TEDx speaker, and an Inc. Magazine Top 100 leadership speaker. Todd can be reached at todd@drdewett.com

New Book Release: This is Ourselves, Under Pressure

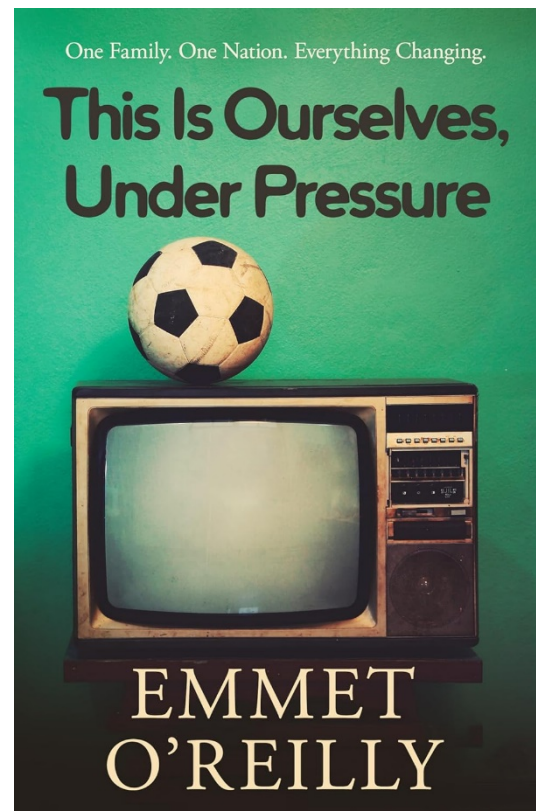
By Emmet O'Reilly *Andersen Alumnus Dublin, Ireland Office 1994 to 1998*

"It was the summer we learned to believe. In ourselves, in each other - and in what Ireland could be.

From the coal-scented streets of 1950s Dublin to the fevered roar of Italia '90, *This Is Ourselves, Under Pressure* follows the Byrne family as they navigate a nation on the cusp of transformation. Jimmy and Joan come of age in a country caught between the comfort of old certainties and the excitement of new ambitions. But as their love deepens and their family grows, the values that shaped them collide with the realities of modern life. Faith is questioned. Loyalties are tested. Football becomes more than a game.

By the time the nation holds its breath in the summer of 1990, the Byrnes - and the country around them - have learned to look forward, not back.

Heartfelt, sweeping and sharply observed, this is the story of how one ordinary family reflects an extraordinary national journey - from survival to hope, from silence to song."



Copies of This is Ourselves, Under Pressure can be purchased on [Amazon](#)

Takeaways from First Innovator Summit

By Louis Gump *Andersen Alumnus, President Cambian Solutions and Author of The Inside Innovator: A Practical Guide to Intrapreneurship*

On June 17th, we held our first Inside Innovator Summit in Janesville, WI.

Based on my book [The Inside Innovator](#) (2024, Fast Company Press), the event was designed to provide a deeper dive into concepts and practices for world-class innovation within larger organizations.

While flying from Atlanta to O'Hare before the drive to Janesville, I was thinking of earlier experiences taking the same flight on the way to St. Charles!

We had a great showing with people from the Janesville area, Madison, Milwaukee and Chicago, among other places. The feedback from the event has been overwhelmingly positive and truly inspiring!

We've been reflecting on the conversations and written comments received since then, and it's clear that the event made a real impact. Here are 10 key takeaways that resonated with our attendees:

- “If you can’t find the keys, look in your pockets.” Many of us who are looking for ways to grow revenue and innovate have the answers right in front of us. We just need to look in the right places and pay attention.
- While elevating excellence in intrapreneurship, also invest in building a great culture.
- Entrepreneurs magnify success when they welcome and support intrapreneurs in their organizations.
- Participants from various industries and perspectives (including healthcare, IT, retail, consumer goods, consulting and non-profits) found this topic broadly relevant and helpful for their own situations.
- While AI is an area that many are focusing on, there are still lots of other options for growth and innovation. These include new product offerings, expanded services, geographical expansion, line extensions, IoT, and more.
- Having a good idea isn't enough. You need to know your audience when communicating this idea and speak with their vocabulary and interests in mind.
- High trust is important in many ways, including team cohesion, reception of new ideas and support for initiatives over time.
- The top characteristics of an inside innovator are helpful in screening new applicants.
- Be open to listening to ideas and allow your team to help you build.
- “This event left me inspired both on a professional level, a personal level and a level where I had a list of people, I wanted to discuss the concepts with afterwards.” - Event participant

This summer, you have the opportunity to gain experience and knowledge that will benefit you for the rest of your career- both as insights on their own and also building blocks for future career opportunities. That is in some ways an extension of what we learned along with way as Andersen alumni. Here's to lots of learning and inside innovation going forward!

If you'd like to increase your team's capabilities to grow in a sustainable and people-friendly way that aligns with the above takeaways, please reach out any time.

The Inside Innovator is designed to help people achieve more, build stronger relationships and increase personal fulfillment through intrapreneurship. For more about the book, please see <https://louisgump.com/>.

Termination: A Lost Discipline in a Disrupted World

By John Blumberg, *Andersen Alumnus and author of Return On Integrity*
(www.BlumbergROI.com)

In a world increasingly shaped by artificial intelligence, polarized ideologies, and relentless disruption, our ability to navigate change has become more vital—and more complicated—than ever. We are inundated with headlines about transformation, but far less attention is paid to the essential but uncomfortable truth at the heart of all true change: something must end before something else can begin. In times like these, marked by both acceleration and uncertainty, the discipline of honoring and celebrating endings may be one of the most underestimated practices of our time.

With the excitement of graduation celebrations fading into the background, mid-summer brings the reality and sometimes the anxiety of new beginnings. It can be an emotional time. I still remember the night of my high school graduation, and maybe you still remember yours, too. It's certainly a time for celebration, but most importantly a time for closure. Both are critically important. And when combined, they can be very powerful.

A few years back, a friend of mine decided to leave behind her business career to return to school to study for a master's in social work. In what seemed like overnight, Laurie came to the completion of her program. Shortly before her graduation, she contacted me because she had been put in charge of a team who was planning a "termination activity" for their graduation luncheon. Graduation seems to candy-coat the truth. It is a fluffy way of looking at the reality of transitions in our lives. Termination sounds more severe, yet more truthful. In all the joy and celebration of graduation, it is still an ending. Laurie and her team had it right. They understood the importance of intentionally bringing closure. It is about creating a defining moment to end something — ***specifically so something new can begin.***

This is significant when school's out for summer – but it also has huge implications in a workplace where change is so persistent. In my final years at Arthur Andersen, I spent a significant amount of time on-boarding successful experienced professionals going through career transitions. During that time, I came to realize the importance of closure. Author William Bridges, in his book [*Transitions: Making Sense of Life's Changes*](#), did exceptional work in helping us understand the psychology of transition. He talks about the three key stages of the process as being Endings, the Neutral Zone and New Beginnings. While the process is not exactly sequential, it is certain that without an ending it is far more difficult, if not impossible, to truly arrive at a new beginning. Unresolved endings are like anchors that keep us from soaring forward into new chapters of our career and life.

Termination is also about accomplishment. It is about being finished. It could be about cutting your losses or perhaps moving on from success. Either way, termination is important.

When we think about graduation, we think about BIG transitions. The idea of termination, however, is vital in numerous transitions in our work. It could be big, as in cases of mergers or acquisitions. But it also might be as simple as the end of a project or process. It could be the transfer to a different team or division. It might be the relocation to a different city. The key becomes understanding the importance of creating a termination celebration.

At some point, I am sure you have heard someone say, “He never really graduated from high school.” Of course, this statement has nothing to do with obtaining a diploma. It has everything to do with bringing closure and moving forward.

Do you have a termination celebration strategy in your organization? A well-thought strategy can transform how you on-board new hires, how you handle transfers and promotions, or how you manage resignations and outplacements. Change itself is not the challenge. It is *the process of change* and how we walk through it that determines if it propels us or destroys us.

How do you celebrate termination – personally and professionally? Do you have an unresolved ending? If so, retroactively create a termination celebration – or at least get a strategy for future endings. There will be many more to come. Let your mortarboard fly – and land on a great new beginning!

In this era of exponential change, where machines evolve faster than we do and uncertainty is the new normal, learning how to end well isn't just helpful, it's essential. The ability to acknowledge, honor, and release what has run its course is a leadership competency for our time. Without it, we risk dragging the past into every future we try to create. But with it, we can clear the space needed to reimagine, reorient, and renew. In a culture obsessed with what's next, let's not forget the transformative power of what's done.

As always, I'd love for you to share your thoughts! We could all benefit, if you would be so kind to share your thoughts email me at John@BlumbergROI.com!

Check Out the Best Free LinkedIn Feature that Most People Haven't Discovered Yet

By Wayne Breitbarth, Andersen Alumnus and CEO-Power Formula LLC (Author of *"The Power Formula for LinkedIn Success: Kick-Start Your Business, Brand and Job Search"*)

LinkedIn has lots of great ways to find the right people in its one-billion-person database, but the one that seems to have the biggest wow factor is using the *Connections of* feature to search for people who can refer you to people in your target audience. I find that most people don't know they can do this nor can they believe it's available on the free LinkedIn account.



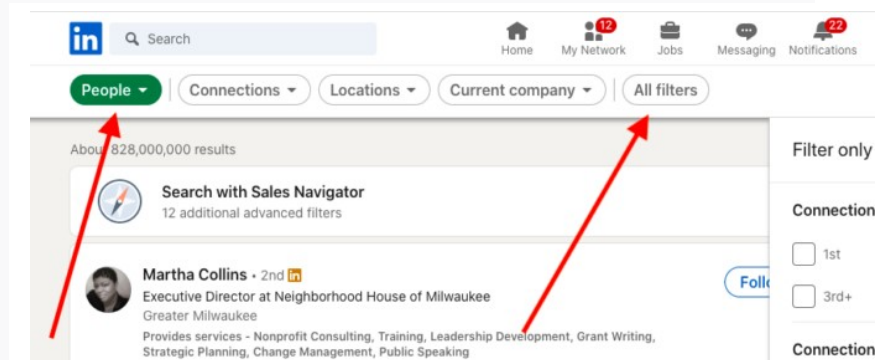
Think of this LinkedIn feature as an easy-to-use electronic version of an old-school Rolodex but with all the available filters to find just the right people in mere seconds.

Note: If you were born after the Rolodex died, it is a paper-based business card filing system (see picture above).

Step-By-Step Instructions

1. Put your cursor in the big, white search box in the top toolbar and hit the return or enter key and then select *People* in the white toolbar that appears (far left). Then select *All Filters* (far right).

2. Next, go to the *Connections* of box and type in your connection's name. When his/her name appears in the drop-down menu, choose that entry, and then click the blue *Show results* button.



3. Now use any of the other available filters to narrow the search to people at the right company, location, school attended, title, etc.

Caveat: If your connection has chosen to [hide their first-level network](#) from their connections, you'll only be able to see people to whom both of you are connected.

What to do with the search results

Review the list LinkedIn provides for you. If you find people who look interesting to you, check out their profiles, and then ask your connection how best to approach the people (through a LinkedIn connection request, phone call, email, in-person meeting, etc.).

The four questions I would ask my connection about the people on the list are:

1. Do you know them? (Not everyone knows the people in their network well enough to refer you)
2. Do you think they would be interested in hearing about how I might be able to help them? (You're trying to find out if your connection knows them well enough to know their level of interest in what you do)
3. Can I use your name and our relationship when I reach out to them? (This is getting their permission to name drop)
4. What do you think is the best way to get ahold of them? (Send a customized LinkedIn connection request, email, phone call, etc.)

If you get “Yes” or “You bet” to the first three questions, then go ahead, reach out and try to start a new relationship by referring to your mutual connection. The reach-out could take place in the form of a LinkedIn connection request, but you could also use more traditional methods, like a phone call, email, or stopping by for a visit.

If you're like most people, once they learn of this feature, they can't wait to get started and put it to use.

What are YOU waiting for? Get started NOW.

SPECIAL OFFER

If you'd like me to help you capitalize on this and other money-making LinkedIn strategies, plus provide an in-depth critique of your LinkedIn profile, [sign up](#) for a one-hour, one-on-one virtual consultation with me for the significantly reduced rate of \$197.

Book your personal session today at <https://www.powerformula.net/one-on-one-linkedin-consultation>.

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Andersen Alumni Association is proud not to charge annual alumni dues and relies rather on strategic sponsorship to fund operations. Given advances in technology and alumni mobility Andersen Alumni Association is seeking a few additional qualified sponsors. If you think your company may benefit from a strategic partnership with the Association, please email Admin@andersenalumni.com for more

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Andersen Alumni Association has partnered with Lenovo to provide our members with savings when purchasing top quality PCs, tech and accessories from Lenovo. To explore your savings go to:

<https://www.lenovo.com/us/en/andersenalumni>



Andersen Alumni Association and the Private Directors Association© Align to Drive Membership Value

PDA is providing a 20% discount on corporate or individual membership for Andersen Alumni Association members*

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*15% going to the alumni members as a direct membership discount and 5% to the Andersen Alumni Association organization

Long Term Care - Insurance Coverage

70% of Americans over 65 will need some form of long-term care. And that care will be expensive. According to a recent survey, the cost for long term care can currently range from \$48,000 a year for home care to \$98,000 a year for a private room in a nursing home; and costs are increasing every day. Planning for these expenses with long term care insurance can help you maintain your lifestyle, protect your assets and savings, and give you the options necessary to receive care and services.

BPB Associates of Atlanta has been helping families like yours with their extended health care planning needs for 33 years and has negotiated special discount carrier pricing for Andersen Alumni members. Click here for more information: www.bpbassociates.com/andersenalumni/LTC

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Medjet provides reduced annual rates for its Air Medical Transfer membership program on a voluntary purchase basis to North American members affiliated with ***Andersen Alumni Association***. Medjet provides single point coordination for the safety and protection of organizational clients and individuals/families as they travel for personal or business reasons - domestically and abroad. Zero cost beyond the membership fee for services coordinated by Medjet in medically transporting a member back to a home country hospital of their choice in time of need.

Medjet also offers an optional membership upgrade branded as Medjet Horizon that provides (among multiple membership benefits) a 24/7 Crisis Response Center for **Travel Security and Crisis Response** consultation and coordinated in-country services.

Learn More/Enroll? Persons from the U.S., Canada or Mexico can visit Medjet at www.Medjet.com/Andersen or call Medjet at 1.800.527.7478 or 1.205.595.6626. Reference Andersen Alumni if calling. Enroll prior to travel.

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Social Media: Association's LinkedIn Group (Join), Company (Follow) and Facebook Fan Page (Like)

Social Media is a great way for us to stay connected. To request the Association Status be added to your LinkedIn Profile click on the following URL to JOIN:

<http://www.linkedin.com/e/gis/38306/6E0CB25BC94E>

Additionally, you can "FOLLOW" the Association by clicking on the following URL:

http://www.linkedin.com/company/andersen-alumni-association?trk=tabs_biz_home

To "JOIN" our new Facebook fan page simply click on the following:

<http://www.facebook.com/pages/Andersen-Alumni/182112725168442>