



GET STARTED

Cultivating Human Development Using Birkman



CHALLENGE

Marcum LLP, a top-ranked accounting and advisory firm, is dedicated to enhancing employee engagement at the highest level and attracting new associates to its expanding firm. They were searching for a solution to introduce more personalization to their soft skill training, further promoting continuous development—from recruitment to leadership development at its highest levels.

SOLUTION

The firm underwent a cultural transformation by introducing The Birkman Method, which involved coaching, training, and development initiatives. Every employee who completed The Birkman Method assessment was also provided with access to their Birkman Map.

RESULT

Employees incorporate Birkman in their language and daily interactions. The firm noticed a positive shift in behavior and perception of the culture, better collaboration, appreciation of differences, and increased employee engagement.

Challenge

Marcum LLP, a top-ranked accounting and advisory firm, set out to go above and beyond in talent development. They were searching for a solution to introduce more personalization to their soft skill training, further promoting continuous development—from recruitment to leadership development at its highest levels.

The firm leveraged a new assessment solution capable of achieving its people personalization efforts while integrating seamlessly into the entire employee lifecycle, from recruitment to ongoing professional growth.

Solution

Central to implementing The Birkman Method at the firm was Laura Rohde, Marcum's Chief Learning Officer.

"When we talk about Birkman's return on investment, it's not a number. It's a feeling," Laura states. "When your leaders start talking about a colleague's Birkman Colors or when employees start bringing someone else to a client meeting because they have a different perspective... that's when you know. You can't put a number on it. But that's when you know you've made a difference." This shift wasn't quantitative but rather qualitative, as it was a shift in behavior and perception.

Laura introduced each executive committee member to the assessment, facilitating individual discussions to understand team dynamics, appreciate differences, and identify opportunities to leverage each other's strengths. The goal was to establish a common language among this intact team. With leadership support secured, Birkman was introduced to a core group of tenured employees entrusted as Birkman ambassadors to spread it throughout the organization.

The ambassadors used Birkman terminology to institutionalize it in their daily interactions with others, such as meetings and coaching conversations. They also embedded it within current processes while encouraging others to do the same.

For quick implementation, the team created an internal portal showcasing each employee's Usual and Needs Birkman Colors. This helped staff prepare for conversations and meetings, streamlining communication and decision-making. Each employee has Birkman colors on their profile pictures on Outlook and Teams for easy accessibility. Next, the team implemented The Birkman Method within the employee lifecycle.

Hiring and Recruitment

Marcum Search, the talent acquisition arm of Marcum LLP, implemented The Birkman Method assessment internally in their pre-employment hiring practices. Externally, the firm applied it to talent solutions for their clients. This approach extends beyond qualification—it looks at a candidate's behaviors, preferences, and motivations to see how well they match the role and responsibilities of the job.

Marcum Search also considers a candidate's fit with the organization's culture. By delving into candidates' natural strengths and tendencies, the firm ensures a seamless integration within the existing team dynamics. This approach ensures that potential employees not only meet the skill requirements of the position but also possess a motivational fit for long-term success and employee satisfaction. When asked about Birkman's use in the recruiting process, Heidi Hoyt, Chief Operations Officer for Marcum Search, stated, "Utilizing the Birkman Method in the recruiting process is like having a blueprint for a puzzle; it helps us see not just who fits, but how they'll connect with the bigger picture of our client's organizational culture and goals."

Introduction to the Birkman Method

After hiring a new employee, the HR and Learning and Organizational Development (L&OD) departments work together to provide a smooth and effective onboarding process. The candidate is then offered the opportunity to take Birkman through the course "Introduction to the Birkman Method and Results." Often waitlisted due to its popularity,

Marcum employees are eager to learn about their Birkman and how to use the results to create a better impact within their team.

In addition to offering an introductory course, Birkman is utilized post-hiring for team placement and other activities that aid in successfully integrating new team members. Alongside teams, Birkman is used for leadership assimilation. This allows leaders to better understand the team they are inheriting and lets their new team learn more about the leaders themselves.

Talent Development

Marcum U, Marcum's internal university, is designed to attract new quality candidates, retain top performers, develop high-potential employees, create succession plans, and foster ongoing development efforts for everyone at the firm.

The Marcum U curriculum is infused with Birkman principles and terminology to create a common company language. Thus, it provides a personalized learning experience and keeps Birkman front of mind across the organization. Participants have shown improved coaching effectiveness, developed greater emotional intelligence, and strategized ways to lead and manage others effectively.

"We are committed to keeping Birkman in front of people in short, consistent amounts that are digestible," says Kelsey Music, Senior Manager of Talent Development. "Marcum U helps people reference their Birkman data often, which helps make an overall larger impact."

Currently, Marcum U includes 60 essential professional skills courses tailored to expanding and developing soft skills. Other programs include:

- Marcum's Leadership Summit for aspiring or new partners to increase their coaching, leadership, and firm management skills
- Marcum's Trusted Advisor program for senior managers, directors, and partners to increase their business development and client experience knowledge
- Rising Stars Program for top-performing managers

- National Manager Conference for new Firm managers

In these courses, programs and during team building sessions, Marcum provides time for employees to discuss Birkman scores and reports with each other. This provides a safe space for team members to have deeper, meaningful discussions on similarities and differences in their styles and preferences...

Coaching and Mentoring

The firm created a coaching program, pairing up employees based on personality profiles. By carefully curating these pairings, the L&OD department is helping employees gain awareness of their communication style and how to adjust it when communicating with others. These coaches, deemed career counselors, help their associates become aware of their Birkman Colors and behaviors, helping them adapt to certain situations and colleagues— and promoting better work.

Marcum harnesses the insights from The Birkman Method as a powerful tool to address team or interpersonal conflicts among employees. By understanding individuals' unique personality profiles and behavioral tendencies, leaders identify potential sources of conflict or stress to foster greater understanding and collaboration. Marcum cultivates a culture of continuous learning, collaboration, and growth through this multifaceted approach across the employee lifecycle.

Team Performance

Engagement teams come together to work on a client and range from two to 20 individuals, depending on the client's size and needs. These project teams work in a fast-paced environment, so quickly understanding one another is critical. To effectively collaborate, team members must understand the group dynamics, including each person's strengths, how to naturally fulfill their colleagues' needs, and identify unseen opportunities. In high-pressure situations such as tax season, it's crucial to recognize stress behaviors and how to combat them before they turn unproductive.

Marcum is purposeful in how teams use the assessment tool. While the leader may request a teambuilding workshop, conversation, or activity, the L&OD department ensures the request aligns with organizational goals and evaluates its value and potential outcomes. When leaders want to utilize Birkman, the department evaluates their stage of team formation and the team dynamic.

Result

The introduction of Birkman brought noticeable shifts in Marcum's organizational dynamics, prompting the executive committee to embrace its positive impact across the employee lifecycle. The firm noticed how the culture between people started to change, with individuals engaging in conversations differently and thinking about their interactions while leveraging insights from Birkman.

As described by Laura Rohde, this shift wasn't quantitative but rather qualitative, as it was a shift in behavior and perception.

Employees incorporate the Birkman language and data into their daily interactions, from client meetings to collaborating, developing a deeper understanding and respect for each other's differences.

Now, employees at Marcum want to uncover differences in perception, and the HR and L&OD departments strive to equip their employees with ways to respect those differences. This philosophy, summed up in the mantra, "It's not wrong, it's just different," became a guide in fostering a more inclusive and understanding work environment.

"It's not wrong. It's just different. It's the most approachable, digestible way to say it. We see the world differently. *It's not wrong. It's just different.* That's the message we're sharing with our clients and teams internally. We want them to appreciate differences and learn to take advantage of them," said Megan Last, Senior Manager of Learning & Organizational Development.

By reinforcing this message across various organizational touchpoints, Marcum leveraged Birkman as a unifying language that resonates with its associates. The firm has continued

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to facilitate meaningful dialogue, create a streamlined onboarding process, increase team cohesion, enhance employee development experience, and resolve conflict in the workplace. Ultimately, Birkman has driven better work. Marcum's L&OD team has now expanded the use of the tool outside of Marcum, working externally with clients to bring Birkman to each stage of their employee lifecycle.

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Support

Frequently Asked Questions

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