

# Women Leaders in Global Client Service

## A Roundtable Discussion with Ernst & Young Partners

**EDITORS' NOTE:** Since 1996, Ernst & Young has visibly and consistently implemented processes and programs to increase the representation of women at all levels in the organization – from entry to top management. The purpose: to achieve “gender equity” – an environment where women can develop and advance without limitation. The five Ernst & Young partners participating in this roundtable (as well as the two other partners featured on these pages) all have become leaders in delivering client service, developing people, and/or managing aspects of the business.

**COMPANY BRIEF:** Ernst & Young is a leading global, professional services organization that provides audit, risk advisory, finance and performance management, tax, and transaction services to clients ranging from emerging-growth companies to global powerhouses. With more than 114,000 people in 140 countries, Ernst & Young is one of the largest professional services organizations in the world. Ernst & Young’s Americas Area includes 39,000 people in 30 countries, including the U.S. firm Ernst & Young LLP. Ernst & Young LLP has been on the Fortune 100 Best Companies to Work For list for nine years, and has won repeated honors from Working Mother magazine, Black Collegian, Hispanic magazine, DiversityInc., the Human Rights Campaign’s Corporate Equality Index, Catalyst, Computerworld, Training magazine, and others.

### What challenges or hurdles did you have to overcome while advancing your career?

**Byers:** I’m focused on the oil and gas industry, which is dominated by men and, further, it’s a pretty macho environment. There is that initial tendency to say, “She can’t be as good as a guy.” But I found that you overcome that if you can produce. The companies that we work with and my colleagues on my teams – these folks are very substance driven. But you do have to prove yourself to overcome those preconceived notions.

**Williams:** As an African-American



*Pictured above clockwise from upper left corner: Deborah Byers, Valerie Williams, Beth Carr, Guadalupe Castañeda, Julie Kunkel*

woman, I’ve had to overcome negative perceptions of my abilities and not allow those biases to define me. I’ve had to learn how to maintain a positive attitude despite these reactions and focus on my goals. Once people see you perform well, those biases go away. I also learned that I have to ask for what I want, take risks in taking on new opportunities, and work diligently to accomplish my goals.

**Castañeda:** I grew up in Chicago, but in a traditional Mexican household. You become very conscious that you’re different from an ethnic perspective. For me, the big hurdle was embracing the fact that I am different. In Mexico now, in terms of my career, it’s not very common to see executive women. Most, if not all, of my clients are male. And I still have to work at feeling it’s okay to be different. When I focus on just being myself, everything flows much easier. A lot of times, we tend to interpret things: it’s because I’m a woman, or because of this or that. Well, maybe it’s because I’m too self-conscious and not being myself. Learning that has really helped.

**Kunkel:** I can honestly say that I’ve never felt that I was not given the exact same opportunities as men at Ernst & Young. I’m pretty outspoken, so if I wanted to work on a prospective client, I would just tell somebody I want to be in the proposal. The only time I remember being irritated from a gender perspective was when I made partner. There were four of us all at the same level, three men and me. One of the men (who has since left the firm) actually said to me, “We all knew you would get promoted first because you wear a skirt.” And I said to him, “Well, it’s interesting that you think that, but the reason I got promoted is because I deserve it.” I’ve never felt what I would call a glass ceiling. Any limitations that I have in terms of where I want to go in my career are self-imposed, because I place a very high priority on raising my kids.

**Byers:** When I was trying to make partner, a partner asked me whether I was really committed, what with three kids and a husband who’s pretty successful. I could see that the partners might be thinking, “Maybe we should give this op-

portunity to a man because we know he's going to go the extra mile." I was furious. But then I realized he took a real personal risk to tell me that. The perception wasn't true, but if I didn't know about it, I couldn't do anything about it. He might have hesitated about being direct with me because of violating some employment rule. But put in the right context, he gave me the chance to sit back and think about how to show that I really was committed. One of the things I did was call up the decision makers and say "I'm up for partner next year, it's really important to me, and I want to get some advice from you." It's the same as dealing with clients. When

## Our Panelists

### Deborah Byers

- 21 years of experience
- Tax Partner
- Americas Tax Leader for Oil & Gas Sector
- Transaction Tax Leader for Americas Southwest Sub-Area
- Global Tax Account Leader for one of the world's largest oil and gas companies

### Valerie Williams

- 26 years of experience
- Audit/Risk Advisory Services Partner
- Managing Partner for Assurance & Advisory Business Services (AABS) in the Americas Southwest Sub-Area
- Independent Review Partner for one of the world's largest oil and gas companies
- Americas Partner Advisory Council (2003-2006)
- U.S. Ethnicity/Diversity Task Force (1999-2004)

### Beth Carr

- 13 years of experience, six of them with another Big Four firm
- International Tax Partner
- Global Tax Account Leader for a Fortune 50 technology company
- Technology Sector Tax Advisory Panel

### Guadalupe Castañeda

- 16 years of experience – 10 in the United States and six in Mexico
- Risk Advisory Services Partner
- Risk Advisory Account Leader for leading Latin American and global telecommunications and financial services companies.
- Americas Gender Equity Task Force
- Mexico & Central America Gender Equity Steering Committee

### Julie Kunkel

- 22 years of experience
- Audit Partner
- Managing Partner of the Columbus, Ohio office
- Client Service Partner for two Fortune 500 retail companies
- Americas Retail Sector Leader (1999-2005)

you're dealing with biases, you need to overcome them by your behavior and give people a different frame of reference about you.

### What have been some of your great client service experiences?

*Byers:* Tax people really enjoy working on the more complex transactions. I was the lead engagement partner on a major merger in the oil and gas industry and I've worked on a number of other very large M&A transactions. These are cutting-edge commercial transactions, not just tax-specific, so I'm also working as part of a multidisciplinary business team, with an amazing range of talent.

*Carr:* Just a few months after I joined Ernst & Young from another firm, I was the tax project manager for the post-merger integration of a major acquisition by a client. There were a lot of facets to the project, from both a tax perspective and in terms of coordinating with different operational areas – legal, HR, etc. – as well as working with other service providers, such as law firms. While the hours were grueling for almost 18 months, we worked as an incredible team.

*Kunkel:* When we proposed on the audit of what became one of my major clients, I didn't think we had much of a chance. There had been a long relationship with the client's incumbent auditor, and it was in the middle of the Enron fall-out and the first year of Sarbanes-Oxley. So it was a high-risk situation for the client to change auditors. What made the difference? First, I would say, was my experience with retail clients. They wanted a lead partner with a strong understanding of the retail industry. Second, they were very impressed by our collaborative style. They liked our emphasis on how we would communicate with the various parts of their matrix organization. I think this reflects not only on my leadership style, but also the culture of our firm.

*Williams:* For me, it was more indirect, supporting our client service teams through our Professional Practice (PP) function, which is the technical group that consults with our engagement teams to provide guidance and assistance in resolving complex accounting, reporting, and auditing issues. I did a rotation in the U.S. National PP group in New York when I was a senior manager. When I returned to Houston, I gradually migrated from direct client service to the area-based PP function, at first part-time and then full-time. There are not many women in professional practice, so it felt great to break into an area I really enjoyed.

### Do women bring something different to client service than men?

*Byers:* It's a cliché, but I think we are much more nurturing in terms of making sure that everyone's input is heard. I look at my own work style and it's a very ensemble-type, consensus-oriented work style. But I'm also very decisive.

*Williams:* Again, it's a stereotype, but I do think that women are more considerate of others and will take the time to actually think

about other perspectives. They're more willing to accept other ideas and solutions for shared problems.

*Kunkel:* People have told me that my non-hierarchical style puts them at ease. I have no problem in asking clients to explain things, to say I don't get something. Many men are less likely to do that. I'll sit down with a client executive when we're tackling a problem and say, "How are we going to get from point A to point B?" Because we have to figure it out together, as opposed to my saying, "I've got all the answers." Now, many men also have a collaborative style, but it does seem more characteristic of women. And I really think it's the best way to approach client service.

*Carr:* A lot of people say that my approach seems more typically male. When it comes to approaching a problem, I'm very task- and solution-oriented – here are steps A through G, and let's just plow through. Where I think I differ from a lot of men is that I also tend to pick up on people's body language and how they react to things, and will adjust my approach to make sure that we're connecting well.

*Castañeda:* Sometimes we see things that men don't, or we see them differently. Men are more prone to see things in black and white, and women, well, there's pink, too. I also see women being more likely to take a conciliatory approach between opposing views. In Mexico, because of our culture there's a certain respectfulness with women. I've been in situations where we had to work out some tough issues with clients, and because I'm there, the men will hold back on some of the intensity around it. That can create a better atmosphere for reaching agreement.

*Carr:* Men and women serving clients together make better teams because they pick up on different aspects. It's respecting the differences and applying all our strengths in terms of delivering a project.

### How do you go about building relationships with male clients – including the informal, social side?

*Castañeda:* I think my greatest accomplishment is not having to play golf. Nothing against golf, but I found that I could build relationships without having to do something that I didn't want to do. Throughout my career, I believed that the way to develop client relationships is based on the quality of service that I'm giving.

*Carr:* I will play golf, although I'm not the best golfer. I've gone to baseball games with men and women clients, although I'm not a huge baseball fan. Events like these give us a chance to get to know each other in a more relaxed setting, and talk about things other than work. But, like Guadalupe, I believe it's really about consistently delivering high-quality work.

*Byers:* I build relationships with male clients perhaps differently from most of my male colleagues. I'm much more interested in them as people. So I actually know more about my clients than most of my male colleagues. As

long as you keep it at a high level, it doesn't take away from your professional relationship. I can talk about sports, and I know all about golf – my husband's a big golfer. But it's not natural for me, and it looks like I'm trying. I'd rather talk about family, kids, books, politics. There are so many things you can talk about. Our clients are multidimensional people.

**What about working in other global markets? Are there special challenges for women?**

*Castañeda:* Most definitely, and it's because of the cultural differences, and the different roles women play in each culture. In Mexico, for example, the woman's role in the family is critical. She is expected to be at home, raising her children. This places great pressure on women wanting to develop their careers, as they feel they need to choose between their families and their professional development. Women who do both many times feel guilty. Ambition is also viewed differently in each culture, and for women in particular. I find that it is much more "permissible" in the U.S. than in Mexico. However, this again relates to the roles women have traditionally played.

*Byers:* I worked on a lot of projects in Venezuela in the '90s because that's where the oil industry was going at that time. Like Mexico, South America is a very machismo environment. People were almost dismissive of me. I remember meeting with a business partner of our client; I was the engagement leader. When I walked in alone, the reaction was, "Where are your partners?" When one of my partners joined us, the client started addressing questions to him. And he said, "Well, actually Deborah's the lead partner, you have to ask her." But I knew in my heart that they weren't comfortable, so I adjusted my style in that meeting and in subsequent discussions. I was there to represent my client, and there was no need to put them out of their comfort zone. So I brought in the guys and presented together with them.

*Carr:* This is where my sort of non-female traits can be an issue. I'm direct and aggressive. A lot of times when I'm dealing with partners in other countries, they are taken aback a bit. On that post-merger integration project I mentioned

earlier, we worked with Ernst & Young teams in over 50 countries. They were getting e-mails from me asking for immediate responses and demanding fees and bills as soon as possible, and so forth. In the end, that one project allowed me to develop good working relationships with a lot of Ernst & Young people in key jurisdictions. When I'm dealing with clients outside of the U.S., I need to consciously be a little

group there, the partners knew me, and it was a relatively smooth transition. But a year later, we combined with another sub-area, and I became the AABS MP for a lot of partners I didn't know. So I feel that I've had to prove myself again.

When you put a woman in this type of leadership role, you have to have a very strong commitment from the person she reports to, which in my case is the Sub-Area Managing Partner. The partners realize that the managing partner put you in that position because he has that confidence in you. Then it's up to you to earn their respect as you perform the role.

*Byers:* I'm in a transition now into the role of Transaction Tax Leader and, again, it's male-dominated. As a woman, you may still have to get over that question of, "Are you that capable?" I'm comfortable giving them time to come to the conclusion that I'm very capable and worth listening to. It has now been six months, and I believe the guys respect me as the leader and we have a great esprit de corps.

*Kunkel:* I just went through my 360° feedback process, and I learned a few things. One is that you should do a 360 every couple of years because, when your role changes, what worked for you before doesn't always work so well in the new role. When you're in client service, being decisive and having a point of view and being completely transparent usually helps build your credibility with the client. When you're an internal leader, some of those same skills may not translate, because not everyone is going to have the same context as you. You have to adapt your communication style for people at different levels and, certainly, in a diverse organization, for

people with different cultural styles. They all have to see you as a leader who they can be comfortable with.

**What have you valued about the leaders that helped you grow, and what role have mentors played in your development?**

*Byers:* Actually, Valerie Williams was one of my role models. She was a senior manager when I was a senior. And just seeing a minority woman make partner and conducting herself with such poise while preserving her feminin-



less aggressive and a little less direct, because it is hard for some cultures to accept that type of a personality in a woman.

**What have been the challenges for those of you who have moved into business leadership roles?**

*Williams:* I actually assumed the role of Assurance & Advisory Business Services (AABS) Managing Partner twice. A year and a half ago, I became the AABS MP in one of our sub-areas. Because I had been in the Professional Practice

ity – that helped me set the stage for how I presented myself as a professional. Then there's another woman partner in the office who's very much a straight shooter – totally herself. So I took some lessons from that.

From the perspective of managing clients, when I was a senior manager, an AABS partner on my major account gave me some hard critiques about my management of the account from a business standpoint. He helped me understand that it's not just about being the smartest kid on the block; it's also about running our

business. Obviously, there also were tax partners who helped me round out how to serve a tax client. And then there were technical partners who showed me how to get a transaction done. It's like the saying, it takes a village to raise a child. It takes a lot of people to develop a partner.

*Kunkel:* Back in 1997, I was the first woman partner in my office, so I have been in every women's mentoring program the firm has ever conceived. The best mentor I ever had was Jim Turley, who is now our chairman, but was then

my Office Managing Partner. Right after I made partner, he put me on one of our major accounts as the signing partner on the audit. He knew the account and the CFO I would be working with, and he thought I could do the job. He took a risk in giving me that role, but he's very willing to give people a chance to stretch.

*Carr:* There have been five mentors who have had huge impacts on me through the course of my career. Only one of them has been a woman because, in international tax, there are a lot more men than women. I would go to the

## Where We've Been, Where We're Going



### **Billie Williamson**

*Ernst & Young Americas Director of Flexibility & Gender Equity Strategy*

- 33 years of experience, including five years as a financial executive with two public companies
- Audit Partner
- Global Client Service Partner for leading aerospace/defense, engineering, and technology companies
- Client-serving representative on the Americas Executive Board

In 1996, we began to focus on developing women into leadership roles at Ernst & Young. We have made tremendous progress. About 21 percent of our titled leaders today are women; 15 percent of our partners/principals are women, up from 5 percent 10 years ago.

We still have more to do to close the gap between our success rates for men versus women. Our continuing efforts include a recruitment program that provides us with a cadre of talented women to move up the ranks; focused guidance and support for our partner-track and leadership-track women; a vigorous effort to enlist men as champions; and accountability among our business unit leaders for measurable gains in women's progress. Our endgame is to have enough women at all levels that we no longer need to support their development and advancement with special programs, and to have a truly gender-neutral working environment.

### **My Career with Ernst & Young**

When I started with Ernst & Young in 1974, my office had about 100 client-serving people, of whom four were women. The office managing partner said to me, "If you can do the work, I will ensure that you get to make partner." He was not the kind of man who came across as a champion of women. But he could see good talent, and he didn't care what gender or color people were as long as they could provide quality client service and help build our business.

I have had a great career in client service. I've worked in male-dominated industries like aerospace and defense, and have led some of our most complex client relationships. I raised a daughter who is now 27, and never missed an important activity in her school, even if I showed up in a business suit while the other mothers were more dressed down. Throughout my career, I have been passionate about developing and advancing women, so it made sense when I was asked to take on my leadership role for flexibility and gender equity in 2005. One of my proudest moments was when I was named the overall Americas winner of the Rosemarie Meschi Award (described on the next page) in 2001.

### **Supporting our Women – and Men**

This is a high-performance profession that makes many demands on our people. To make their choice of this profession as rewarding as it can be, we have to help them be successful in their personal as well as their professional lives.

Young people today value being involved in their communities. Young mothers and fathers want to be more actively involved in the activities of their children. Our workplace flexibility program provides them – women and men – a way to work it all in. That doesn't mean our people work less. They just work smarter, using our great technology, and are more focused on the task than on time in the office.

One of our newest and most important initiatives is extending maternity leave for new mothers. We now provide up to 12 weeks of fully paid leave and up to 22 weeks of leave in all, with their jobs guaranteed. (New fathers who are not the primary caretaking parent can take up to two weeks of fully paid parental leave.) Our support for new mothers returning to work includes a lactation program and various flexible and reduced scheduling options. This total package sends a clear message to our women that, should they choose to be mothers, we want them to be great ones, and also to be able to return to work. Keeping our talented women and enabling them to continue to grow as professionals makes us a better client-serving organization.

people that I wanted to emulate and do what I could to learn from them. Even coming back from maternity leave, people wanted to make sure that I took the time to adjust to being back at work. So I've been extremely lucky in getting the support I needed throughout my career.

**How do you deal with the challenges in balancing your professional lives and the demands of family?**

*Carr:* My son turned one about a month ago, and my husband also has a demanding career. I took four months maternity leave, and it took about six months to adjust to being back full-time. I'm fortunate that my husband takes on more than 50 percent of the home responsibilities. But there is a change. I had always been one of the last to leave the office, and I've cut back on that. I'm less worried about not meeting my professional goals and more worried about not meeting the personal ones.

*Kunkel:* I have two boys aged seven and four. I always tell people that the key to success is to marry well, which means marrying somebody who recognizes that you need to work and fulfill your ambitions. I have something that I'm really good at, and that's client service. Being able to manage challenging accounts, making our clients feel they're getting their money's worth, and developing people – my husband knows that I would not be happy unless I was in that kind of a challenging role. But he also has a very challenging job, so I respect when we need to make his job a priority. We have a very 50-50 relationship, which also means there are months where it's 80-20, and months where it's 20-80.

*Byers:* My husband has a very demanding career, too. My children are 14, 12, and six, and I also have aging parents. At the same time, I'm at the point in my career, after 10 years as partner, when you really come into your own in terms of your ability to have the highest impact for the firm. But your children are getting older, and need more counseling and mentoring. At each inflection point it's a different challenge. When I was younger, it was a lot more physical – work, go home, take care of the kids. Now, we're financially able to outsource a lot of stuff. But your emotional and mental commitment to your family, your job, your colleagues, your clients – it's just tremendous. Obviously, you have to prioritize. But you can't cut corners on the quality of work you deliver to your clients. And when your family needs you, you need to be there. So it's about allocating time and resources. Every day is an opportunity to balance your life.

*Williams:* In a career like public accounting, which is so challenging, it's easy to let your professional goals take control of your life. And it happens before you even know it. That's a constant battle for me – I really have to make myself also focus on the personal. I set personal goals and deadlines, and try to make sure that I accomplish them. All of us in this profession are driven to accomplish our professional goals.

## Recognizing Leadership in Advancing Women

*Ernst & Young's Rosemarie Meschi Award was established in 1997 to honor individuals who foster a work environment supportive of women. The award commemorates Rosemarie Meschi, who died that year at the age of 44. In her 22 years with Ernst & Young, Meschi worked tirelessly on issues and policies relating to the advancement of women and minorities.*



*Anne-Marie Hubert was the 2006 Americas overall winner of this award, selected from a field of 31 finalists. Among the comments supporting her selection were the following:*

- “She has made our gender-equity strategy a personal mission, and carried the message to our senior management and, more importantly, to local management.”
- “Anne-Marie has engaged many of our female professional staff in the process of defining and confronting the issues they face. Her energy and positive outlook, coupled with her overwhelming desire to make a difference for the women aspiring to be the next generation of leaders, makes her an excellent nominee for this award!”

**Anne-Marie Hubert**

- 22 years of experience
- Leader, Technology & Security Risk Services (TSRS), Ernst & Young Canada
- Diverse client base with emphasis on financial services
- Chair, Gender Equity Advisory Group, Ernst & Young Canada (2002 – 2006)

**Winning the Rosemarie Meschi Award**

You don't necessarily realize the impact that your day-to-day words and actions have on people. You do what you do simply because it's the right thing to do. So just being nominated by the people who know you, and hearing from them how you've made a difference – it's a great feeling.

For me, the greatest reward is not the prize itself. It's seeing young women in our offices, who enjoy what they're doing, believe they have a future, support each other, and challenge situations that are not acceptable – and seeing men joining in and supporting them.

**Leading the Gender Equity Advisory Group**

The first thing I did was go out to assess our gender issues across Canada. I came back to our national leaders with a strong business case that we needed to change the landscape for our young women. We were not succeeding as we needed in recruiting the best, developing the best, and promoting the best as far as women were concerned, because of biases in our processes and systems. These may have been unintended and unconscious, but they made it harder for women to succeed. As soon as our leaders became aware of the situation, they made a strong, visible, and vocal commitment to change.

Having that tone and leadership at the top really was the essential element. That let us start to implement programs to ensure our women had the right opportunities to develop the skills to succeed in client service. We defined four goals at the outset: increase representation of women at all levels; increase representation of women in leadership positions; be recognized in the marketplace as an organization that allows women to achieve their full potential; and engage all the partners, principals, and executive directors across the country in supporting our gender equity strategy. And we monitor the key indicators, such as women's representation at various levels and our people surveys, so that we can surface biases and barriers that still may exist, and address them to achieve real gender equity.



And we just have to step back and say, okay, what else do I need to be doing?

**What do you do – and what do managers in general need to do – to develop the next generation of women into leadership roles?**

*Williams:* Women need encouragement and support, including strong mentoring relationships. Once they believe they can be successful, they have the confidence to set high expectations for themselves and live up to them. I've always been involved in counseling, mentoring, and recruiting – because I enjoyed it, but also because I felt, as an African-American woman, there were a lot of women and minority professionals that needed someone like me to encourage and advise them. There were people who did that for me when I was younger in the firm, and I feel I have to do the same for those that come after me.

*Byers:* It's reaching out to them and saying it can be done. When we see women who have high potential we really need to focus on them. We have formal programs, like Career Watch, that really do a great job. But more than that, we have to have partners who say, "I'm going to take an interest in that woman's career." We spend a lot of time training people from staff to senior manager on technical capabilities, but we also have to help them acquire the more intan-

gible executive and leadership skills. We have to be really honest and say, "This is the reality of our environment, and this is how you're coming across, and there are certain things you need to work on."

It's also about giving women the chance to shine. You need someone to put you in a role that it might be easier and more comfortable to put a man in. Years ago, someone took the risk to let me be the global tax lead on one of our largest accounts in a male-dominated industry. He did it to be fair and to not let any hesitancy about a woman in that role stand in my way. But he also did it for the firm, to get our pipeline of future leaders as robust as it needs to be.

*Carr:* I definitely think we need to help our women who are coming up in the firm find the right mentors. I also think that we need to focus not just on the differences between men and women, but also the similarities. It seems to me that women's issues today are probably different than they were 20 years ago. I don't see a glass ceiling for myself. And I feel like part of my job is to focus on the common ground. I think that's how we're going to help more women to advance in this business.

*Castañeda:* I mentor a lot of women here in Mexico. They're very talented, but they don't seem to recognize that. So we need to work with our women to build their confidence and

help them understand that being different is okay and being a woman is okay. Also, we need to be flexible – not only flexible in the sense of managing time at work, but also with respect to different leadership styles. Sometimes, even for someone at my level, if I want to take on a different role, I worry that I have to follow a certain leadership style. We need to recognize that there can be different leadership styles. We need to get out of the box and allow and encourage people to be different.

*Kunkel:* I rarely go to a client meeting without bringing along one of our younger people. For instance, we have a young manager who's very talented and, typically, it's the partners and maybe the senior manager that go to audit committee meetings. But I've asked the audit committee chair and the CFO of one of our very large clients for permission to bring the manager along, so that she can listen and observe. This is a way for her to learn how to work with audit committees rather than to be thrust into the situation when she's a partner without ever having been there before.

In many ways, it's no different developing men or women. You have to be collaborative. You have to give people a chance to stretch. And you have to give feedback in a way that lends clarity to the person about their deficits, without taking away their confidence. ●