



ACADEMY FOR BUSINESS DEVELOPMENT GUIDES

Principles That Make a Difference

A guide must consider the success of another to be of mutual benefit.

A guide must care enough to give constructive feedback.

Overview

As an Academy for Business Development guide, you mentor and work closely with participants over the entire course of the 18-month program. During this time period, you hold individuals accountable for their progress and help them accomplish challenging business development goals. Part of our job at Upstream Academy is to keep your role as a guide from becoming burdensome by providing you with the necessary tools, advice, and support.

Guide Duties

As an Academy for Business Development guide, you are responsible for the following:

- meeting with your participant at least monthly to answer questions, provide support and encouragement, and ensure accountability
- helping your participant set and achieve meaningful business development goals
- ensuring your participant prepares for, participates in, and completes follow-up assignments for each bimonthly Accountability Check-In
- communicating monthly with your firm's Managing Partner regarding the participant's progress

Guide Conference Calls

We are committed to doing everything possible to help you be an effective guide, and we encourage you to contact us with questions, observations, ideas for improving the program, etc. Every six months, Upstream hosts one-hour conference calls specifically for ABD guides. These calls give you valuable information about the program, offer hints and tips for guiding your participant, and provide opportunities to discuss questions that may arise. Each guide call is recorded and a CD with embedded audio is automatically sent to you a few weeks after the call.

SkillBuilding Forums

During the 18-month program, 14 one-hour conference calls led either by Graham Wilson or Sam Allred serve as forums for discussing key business development principles. When all ABD participants from your firm attend a forum together, wonderful opportunities for interaction and discussion are created. Participants receive the PowerPoint and other materials in advance of each presentation and an audio CD of the forum several weeks after the call. As a guide, you are responsible for verifying that your

participant prepared for and listened to the forum. Many firms find it very effective to have guides and participants listen together and then discuss the information as a group afterward.

Goals

During the first ABD Workshop in June, the participant will set specific business development goals. As a guide, you are responsible for helping your participant achieve these business development goals by meeting with him/her monthly to teach correct principles and methods of planning and calendaring tasks, meeting deadlines, and being self accountable.

Hints and Tips for Success

1. **Get buy-in from the beginning.** Emphasize that the skills gained through participation in ABD are life-long, not just something to enhance proficiency for the 18-month period.
2. **Meet monthly with the participant in face-to-face meetings.** Meetings can be informal (e.g., over lunch), at a regularly scheduled time, in conjunction with SkillBuilding Forums or at a special event for the firm's ABD guides and participants. Calendar these meetings well in advance, and don't forget that work flow issues (such as tax season) may require some adaptation.
3. **Have high expectations.** People only grow when they stretch themselves. Guides should ensure that goals are difficult enough to be beneficial to both the participant and the firm, but not so challenging that they become onerous burdens.
4. **Develop a personal relationship.** The personal connection helps make the 18-month commitment much more enjoyable and gives the participant another valuable connection.
5. **Communicate at the correct time.** Often this means calendaring reminders to yourself so you can give feedback, offer direction, or give a reminder at a time when it's most beneficial for the participant rather than when you happened to think of it.
6. **Let the participant do the driving.** Although you have more experience, part of the purpose of ABD is to help participants develop greater initiative and follow-through. Get the participant excited about the program and then allow him/her to direct the work.