



BLUEPRINT FOR EXCELLENCE RETREATS

Why should I attend?

Many firms currently face daunting challenges: the imminent retirement of the Baby Boom generation and the preparation of new firm leaders, how to attract and retain the best and the brightest employees, what to do to help underperformers, how to strengthen accountability at all levels, etc. Blueprint retreats provide firm leaders with proven tools and processes that enable them to respond to these and other challenges.

What will I learn?

Blueprint for Excellence is a proven program that teaches firms how to deal with today's critical issues and achieve excellence through a process of continuous improvement. The Blueprint program blends training, peer interaction, processes, and tools to produce both immediate and long-term results for your firm. Here are some of the things you'll learn at a Blueprint retreat:

- ✓ how to develop and execute a solid plan to address the biggest issues facing your firm
- ✓ how to create a firm vision and a strategy that will motivate everyone to give their best effort
- ✓ how to set meaningful goals, organize tasks, establish and maintain accountability, and track progress toward accomplishing your goals
- ✓ how to produce an ongoing report card on how well your firm is doing in such key non-financial business areas as marketing, firm leadership, and firm administration
- ✓ how to remove complacency, instill a passion for continuous improvement in your employees, and create a high achievement culture in your firm
- ✓ how to eliminate false starts and slow roads to nowhere by taking a "leave nothing to chance" approach to firm initiatives and projects

How will I be taught?

The retreat combines detailed instruction, interaction with leaders in other CPA firms, and take-home tools to aid in implementing what you learned at the retreat. **To get the most out of the retreat, at least two people from your firm need to attend together.**

Who will be the instructor?

Sam M. Allred, CPA, is the retreat instructor. Sam is Founder and Director of Upstream Academy and a shareholder at Anderson ZurMuehlen & Co., P.C. He has repeatedly been named one of "The Top 100 Most Influential People in Accounting" by *Accounting Today* magazine.

When and where will retreats be held this year?

Scheduled retreats are shown below. Registration is limited.

July 26-27, 2010 – Helena, Montana



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