



ELA GUIDES

Principles That Make a Difference

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

A guide must care enough to give constructive feedback.

A guide recognizes that people grow only when they stretch themselves.

Overview

As an Emerging Leaders Academy guide, you mentor and work closely with participants over the entire course of the three-year ELA program. During this time period, you hold individuals accountable for their progress and help them set and accomplish challenging goals and complete important assignments. 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. As a guide, you have access (along with participants) to an Internet-based tool that allows you to track progress on goals and projects throughout the year.

Guide Duties

As an Emerging Leaders Academy 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 goals
- assisting your participant in identifying and successfully completing a challenging leadership project
- ensuring your participant prepares for, participates in, and completes follow-up assignments for each Leadership Training Forum

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. Three times a year Sam Allred hosts one-hour conference calls specifically for ELA 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.

Leadership Training Forums

During each year of the program, ten one-hour conference calls led either by Sam Allred or Tim Bartz serve as forums for discussing key leadership principles. When all ELA participants from your firm attend a forum together, wonderful opportunities for interaction and discussion are created. Participants receive

the PowerPoint, questions to consider, 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. It is also your responsibility to ensure that your participant completes the follow-up questions, which require individuals to identify what they gained from each forum and how they're going to implement what they learned. Many firms find it very effective to have guides and participants listen together and then discuss the questions as a group afterward.

Goals

To be an effective leader, we believe an individual must be highly proficient in at least three of the following skill areas and be competent in the other areas: business development, client management, personal development, team development, and leadership development. Each year, Upstream provides participants with a list of goals in these five skill areas. Participants are then expected to complete both mandatory and self-selected goals. As a guide, you are responsible for helping your participant choose appropriate goals and customize them to meet individual and firm needs. In addition, you are expected to teach correct principles and methods of planning and calendaring tasks, meeting deadlines, and being self accountable.

Leadership Project

Each year, participants complete a challenging leadership project that satisfies one or more goal requirements and develops important skills. We strongly encourage joint projects if your firm has more than one ELA participant. As a guide, you help your participant choose a project and then hold him/her accountable for progress on that project throughout the year to ensure completion by May 31. A good project stretches the participant's abilities, is specific, connected to the firm, and measurable, and has a timeframe. Projects should take participants 10+ hours to complete.

Hints and Tips for Success

1. **Get buy-in from the beginning.** Emphasize that the skills gained through participation in ELA are life-long, not just something to enhance proficiency in a current position.
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 Leadership Training Forums or at a special event for the firm's ELA 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 and leadership projects 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 three-year commitment much more enjoyable and gives the emerging leader 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 ELA 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.