



"Developing great leaders...by design not by chance"

FREQUENTLY ASKED QUESTIONS

Q. What do I receive?

A. With each lesson purchased, you receive the following:

- One master copy of the lesson (in color)
- One copy of the Instructor's Notes for that lesson (in color)
- A CD containing the lesson in PDF format and the PowerPoint presentation (with embedded audio by Sam Allred)

With the first lesson you purchase, you'll also receive a Firm Master Binder, containing an Instructor's Guide, and binder tabs for each of the five lesson subject areas.



Q. How does the program work?

- A. LeaderSkills Institute develops high-quality lessons that help CPA firms teach non-technical, soft skills vital to the success of future firm leaders. Firms purchase the lessons they want to use, paying for each lesson only once. Your purchase gives you the right to use the lesson as many times as you wish within your firm.

Q. What if we would like to provide binders for participants?

- A. Packs of binder fronts, spines, backs, and tabs may be purchased from Upstream Academy at a nominal cost. Each pack can be used with blank binders to make up 10 participant binders.

Q. What do you mean by Instructor's Notes and an Instructor's Guide?

- A. Each time you order a lesson, you'll receive a copy of the Instructor's Notes for that lesson. The Instructor's Notes document is a reduced copy of the actual lesson that participants receive, with margin notes offering tips and ideas for how to most effectively teach that particular lesson. There will also be plenty of space left for you to make your own notes as you prepare to teach the lesson.

When you order your first lesson and receive the Firm Master Binder, the binder will contain a copy of our Instructor's Guide. The Instructor's Guide covers general topics related to effective instruction and will be especially useful to those who are less experienced in teaching and presenting to groups.

Q. What is included in each lesson?

- A. Each printed lesson includes the following elements:
- A title page that includes a brief summary of the content of the lesson
 - One cartoon and a number of quotations appropriate to the lesson topic
 - An Upstream SnapShot™
 - Upstream Insights™
 - Discussion questions

Q. What are Upstream SnapShots™ and Upstream Insights™?

- A. We have found that a brief scenario, portraying individuals handling realistic situations, events, problems, etc. both before and after receiving training, is a very effective way to stimulate discussion. Each lesson contains such a scenario, which we call an Upstream SnapShot™.

Upstream Insights™ is the name we've given to the PowerPoint presentation that teaches the key principles that enable individuals to improve their soft skills. Each PowerPoint presentation is comprised of 16 slides. Firms receive the slides in printed form as part of each lesson. They also receive the slides on a CD, with an embedded audio narration and commentary from Sam Allred.

Q. How much time will be required to prepare each lesson?

- A. That, of course, will depend somewhat on the instructor's teaching skills and experience. We're confident that the consistent format of the lessons and the quality of each Instructor's Guide (a reduced version of what participants receive, with wide margins and notes suggesting how to teach the lesson, stimulate discussion, etc.) will make each lesson easy to present.

Q. Who should participate in the lessons?

- A. That will be determined largely by the lesson topic. All you need to do is identify those individuals within your firm who would benefit from receiving the training and then arrange to teach the lesson. Remember that once you purchase a lesson, you can present it as many times as you wish.

Q. Who should teach the lessons?

- A. The best learning experience will occur if the lessons are taught by a senior partner with some experience as a presenter or instructor. The quality of the instructor materials also makes it possible to have skilled junior professionals serve as instructors.

Q. How long will it take to teach each lesson?

- A. All of the lessons are designed to take approximately one hour to teach. Times will vary somewhat, due mostly to the amount of discussion generated.

Q. How much does each lesson cost?

- A. Each lesson costs \$200. In determining the cost of the lessons, we made a conscious decision to set the price lower than what it would cost you to create your own training materials.

Q. Do Upstream Academy Network members receive a discount on the cost of the lessons?

- A. Yes, UAN members pay only \$125 per lesson.

Q. Are we permitted to put our firm's name and logo on the lesson materials?

A. Yes, we encourage you to do that.

Q. We have multiple offices. Do we need to purchase lessons for each separate office?

A. No. Once you purchase a lesson, you're authorized to use it in any office and as many times as you wish.

Q. What if my clients want to receive this training as well?

A. The excellent training materials you receive through LeaderSkills Institute are designed and priced to be used within your firm to train your own employees. If you are interested in using them outside your firm, please contact Sam Allred (sallred@azworld.com or 406-495-1850).

Q. What if I don't like a lesson I've purchased?

A. Your satisfaction with LeaderSkills lessons is unconditionally guaranteed. If you are not completely satisfied with the value you receive, we will, at your option, either refund your fees or accept the portion of those fees that reflects your level of satisfaction.

Q. What lessons are currently available?

A. Lessons are being developed in five general areas: Client Service, Business Development, Firm Management, Personal Development, and Supervision. For a list of lessons currently available visit our website at upstreamacademy.com.

Q. Are you interested in suggestions for future lesson topics?

A. Absolutely! Please email any thoughts you have about lesson topics to Sam Allred (sallred@azworld.com).

Q. How will we find out about future lessons?

A. Any firm that has ordered a lesson may automatically receive email announcements as future lessons are released. If you would like to be added to the list to receive updates on current lessons please contact Georgia Cummings at 406-495-1850 or georgiac@upstreamacademy.com.