UPSTREAM™ ACADEMY

BD ADVISORY

A Program Designed to Help You Master Advisory Business Development for the *Right* Growth

Done right, business development is a natural extension of serving your clients.

High-performing firms know profitable growth is critical to firm success—but not all growth is created equal. Focusing on bringing in *more* business without strategically determining the *right* business negatively impacts both client relationships and firm member retention. Who wants to bring in more clients and lose your best clients and firm members in the process?

Approaching business development with a strategic, advisory mindset helps firms serve clients, develop professionals, and achieve financial success.

Join us for *Advisory Business Development.* The program will help you reframe your approach to firm growth, enhance your advisory process, and be more impactful with your business development time. We'll provide coaching on BD skills so business development becomes repeatable, your BD practice becomes more efficient and enjoyable, and you can focus on helping clients with their top goals and issues.

Who should attend? This program is ideal for managers, senior managers and partners who want to be more intentional while finding, growing, and retaining clients advantageous to their practice. Participants should be prepared to work to improve business development skills and their advisory approach to client relationships.

What can you expect? We will use a combination of presentation, and peer-to-peer sharing to provide a step-by-step guide to creating a successful advisory process.

What is included? Individuals will follow a three-step process that results in a customized plan for ongoing client and pre-client opportunities based on an advisory approach:

- Pre-work completed by each participant for program accountability
- Four two-hour, interactive webinar training sessions
- Post-training assessment to measure progress

When does the program start? The program will launch this fall. Prior to the program start, individuals will need to spend 1-2 hours doing pre-work, so they are ready for the first session.

What is the cost? The registration fee is:
$3,600 ($3,000 UAN) for up to 5 participants
$5,900 ($5,000 UAN) for up to 10 participants
$10,000 ($8,500 UAN) for up to 20 participants

Enhance your BD advisory skills and confidence, so you can use your BD time more effectively

Key Elements of *Advisory Business Development*

During this program, you'll create a comprehensive plan for improving your business development process and growing individual advisory skills.

1 Pre-Work Resources

When you register for the program, you'll gain access to an online questionnaire to help you gain insights on the greatest opportunities and obstacles you and your firm face.

The objective of the pre-work is to help participants assess where and how they are investing advisory time and evaluate their success, so they can create a plan to improve individual skills.

The survey will identify key client and pre-client relationships to ensure BD time is spent effectively.

2 Firm Resource

Your firm will receive access to a *Best Practices in Business Development* presentation that can be shared with anyone in the firm. The session will qualify for one hour of on-demand BD training and will summarize the key principles and take-aways from the program.

3 Virtual Classroom

Four two-hour sessions will teach advanced business development concepts. Each virtual session will include both proven processes and guidance on practical application. All sessions will be recorded so you don't miss anything!

Creating Wise Growth Culture & Investing BD Time, Energy, & Focus

- Where and How to Invest ABD Time
- Defining Ideal Clients
- Creating Exceptional Client Experience Plans
- Implementing Client Screening and Setting Expectations

Building Meaningful Relationships

- Leveraging "Raving Fan" Relationships
- Building a Meaningful Business Network
- Creating more than an Elevator Pitch
- Utilizing Education-Based Value Add-Marketing

Creating a Client-Centric Focus

- Highlighting Value and Expertise
- Creating a Culture of Cross-Serving
- Building Win-Win Opportunities
- Avoiding Meeting and Presentation Pitfalls

Delivering a Client-Centric Focus & Path to Success

- Moving from Theory to Application
- Ensuring effective BD Goal Setting and Accountability
- Utilizing the Power of Three and Goal Sharing
- Planning for Next Steps and Progress

Need more information?

Contact info@upstreamacademy.com or visit our website at www.upstreamacademy.com.

Key Elements of *Advisory Business Development*

4 Post-Training Assessment

To evaluate key client and pre-client progress, participants will provide an update on identified pre-program pursuits to ensure accountability and to track program results.

5 Optional: Coaching and Implementation Assistance

To ensure ongoing skill mastery and accountability for the goals set, your firm participants have the option to meet with Heath for four one-hour virtual, hands-on coaching sessions.

During these sessions, your team will focus on critical business development skills, client and pre-client strategies, and real-world pursuits.

Additional Cost: $4,000 for up to 10 participants per group

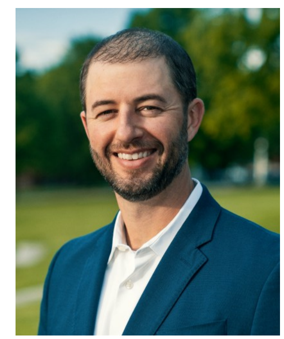
Upstream Academy will recommend CPE credit based on the level of participation in this course. Prerequisite: None Advanced Preparation: None. Skill level: Overview

Upstream Academy is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org.

6 Unconditional Guarantee

We're confident that the *Advisory Business Development* program will be of immeasurable value to you. Like everything we do at Upstream Academy, this program is unconditionally guaranteed to your full satisfaction. If you're not completely satisfied, we will, at your option, either waive your fee or accept that portion of the fee that reflects your level of satisfaction.

7 Experienced Instructor



Heath Alloway, Faculty at Upstream Academy and Chief Growth Officer at Harris CPAs, has years of experience coaching firm members to take a proactive approach to firm growth and business development. A popular speaker and facilitator, Heath will help participants find their own business development success.

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Need more information?

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