



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.

The highest-performing organizations understand that 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 can have a negative impact on client relationships and firm member retention.

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 firm. Participants should be prepared to master business development skills and improve their advisory approach to client relationships.

**What can you expect?** Heath will use a combination of presentation, peer-to-peer sharing, and firm coaching 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
- Five two-hour, interactive Zoom training sessions
- Three one-hour BD mastery coaching sessions customized for your firm

**When does the program start?** The program will launch October 20, 2022. 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 \$5,000 for up to ten participants from your firm (UAN members pay \$4,250). The program is limited to ten firms.

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

# Key Elements of *Advisory Business Development*

**D**uring 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

Five 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!



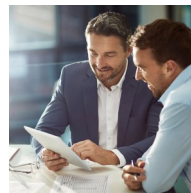
### October 20, 2022: The Foundation Supports the Build

- Why You're Here
- Growth as an Extension of Serving Clients
- Where to Invest Your BD Time
- How to Invest Your BD Time



### November 03, 2022: Creating an Exceptional Client Experience

- Client Service as a Differentiator
- Asking the Right Questions
- Creating Capacity for A-Level Clients
- Developing More A-Level Clients



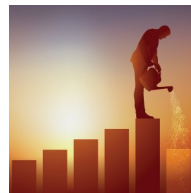
### November 17, 2022: Value and Expertise Are More Than a Fee

- How Clients View Value
- Using the Power of Questions
- Switching from a My Client Mindset to a Firm Client Mindset
- Creating a Culture to Cross-Serve



### December 01, 2022: Client-Focused Approach

- Find More A-Level Pre-Clients
- Holding Results-Driven Meetings
- Win without a Formal Proposal
- Presentation Strategies and Pitfalls



### December 15, 2022: Path to Success

- Small Steps Equal Something Big
- Planning Your Next Steps
- A Culture for Advisory Growth
- Golden Nuggets

Need more information?

Contact [info@upstreamacademy.com](mailto:info@upstreamacademy.com) or visit our website at [www.upstreamacademy.com](http://www.upstreamacademy.com).

# Key Elements of *Advisory Business Development*

## 4 Coaching and Implementation Assistance

To ensure accountability for the goals you've set and to propel client and pre-client progress, your firm participants will meet with Heath for three Virtual Mastery Classes.

During these interactive Virtual Mastery Classes, your team will receive high-level guidance and coaching. Your firm can identify key coaching areas of focus (business development skills, strategies, questions, etc.). Your firm will be responsible for identifying objectives and coordinating with Heath to schedule Mastery Class dates.



## 5 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.



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](http://www.nasbaregistry.org).

## 6 Experienced Instructor

Thought leader for our profession, Heath Alloway, has years of experience helping firm members improve their business development success.

He will help your firm apply business development theory to your real-firm experience so you can see more of the right kind of growth.

**Heath Alloway**, Director at Upstream Academy, spent more than thirteen years at a top accounting and consulting firm, where he served as National Growth Manager and Director of Business Development. Heath led a multi-disciplinary team of 20, focused on strategic growth plans, development and launch of new services and industry verticals, leveraging firm data, and firm-wide business development training. He worked closely with firm and industry leaders to position the firm for present and future success by focusing on growth and innovation. His passion for helping others succeed makes him a popular coach and speaker.



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