

## WHAT PARTICIPANTS AND FIRM LEADERS ARE SAYING ABOUT THE PROGRAM

"As the guide for a first-year ELA participant, I'm very pleased with the results we've seen to date. I've taken an active role as a guide, have participated in many of the Leadership Training Forums, and feel like I'm getting as much out of them as our participant is. I wish I'd had access to a program like this when I was working towards becoming a partner!" *Kathy J. Klang, Partner at Cummings, Keegan & Co., P.L.L.P.*



"Emerging Leaders Academy was a great asset to me, my firm, and my growth into the Managing Shareholder position of our firm. My guide in the process was my predecessor in the managing shareholder role, so it led to a smooth, well thought-out transition. We've seen so much value from this program that we have and will continue to send our future leaders through this program. In addition, we have seen great returns on the various projects that participants have completed." *Scott Goldsmith, Managing Shareholder at JamisonMoneyFarmer PC*

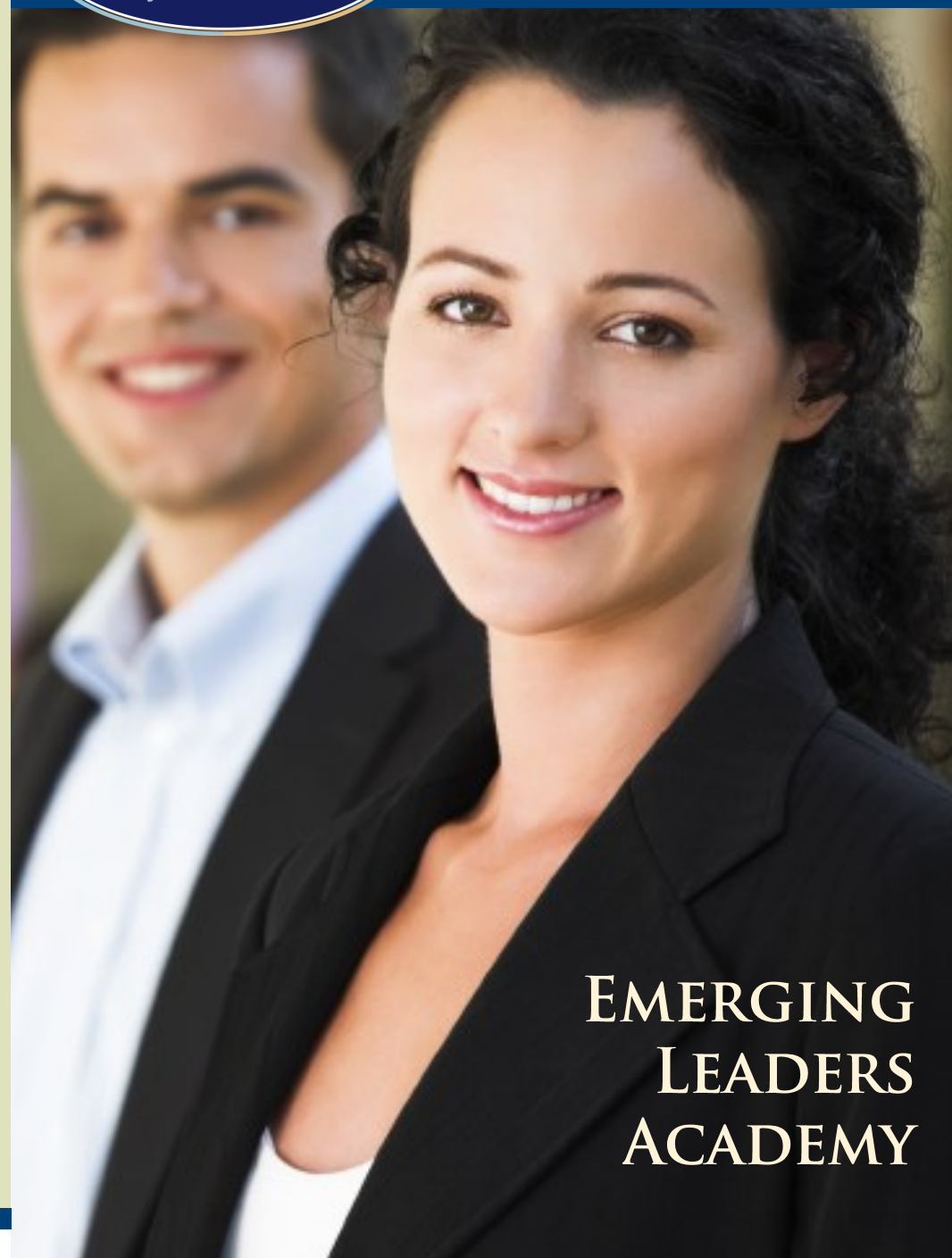
"The ELA program has broadened my understanding of the profession, relevant elements of firm management, and what to expect from myself and my partners. It gives me tangible tools to encourage growth and excellence and has helped me visualize the future. It has helped me appreciate all the good we have already accomplished as a firm and have more confidence in new opportunities and our direction. *Lynn Mills, President at Walz Group*



"I have really enjoyed the ELA program. Sam, Tim and their team provide excellent information that is practical and relevant. And they do it without 'preaching.' Excellent!" *Mike Gilmore, Partner at BDO Canada*



HELPING YOU DEVELOP  
HIGH-YIELD LOW-MAINTENANCE  
FIRM LEADERS



# EMERGING LEADERS ACADEMY

A new program year begins each June, with  
a registration deadline of June 1.

To register visit [www.upstreamacademy.com/ela/](http://www.upstreamacademy.com/ela/)



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## EXCEPTIONAL TWO-YEAR LEADERSHIP DEVELOPMENT PROGRAM EXCLUSIVELY FOR ACCOUNTING FIRMS

# OUR PROFESSION IS STANDING ON THE THRESHOLD OF DRAMATIC CHANGE

Our industry has seen a wide array of changes in recent years, including the departure of thousands of stakeholders. Many wonder if the next generation is ready to take the reins of leadership.

Most firms recognize the need to prepare future leaders. Some have tried—with only limited success—to develop their own programs. Others look beyond the profession, only to experience frustration from trying to adapt outside programs. Most firms acknowledge that they've struggled to do what's really needed to train future leaders for the changes coming.

Quality programs exist, both within and outside of public accounting. But as we've talked with managing partners, they've shared concerns and what they'd like to see in a program to prepare emerging firm leaders. ELA is built on these discussions.



We believe an exceptional leadership development program must possess the following key characteristics:

- the program must be focused on helping participants become high-yield, low-maintenance leaders
- learning must be continuous, delivered in digestible doses regularly throughout the year
- individuals must be able to apply what they've learned by accomplishing challenging goals throughout the year
- the learning experience needs to be easily customizable to meet individual and firm needs
- current firm leaders must be involved in the training to ensure participants are able to apply the lessons learned within the firm
- each participant needs to have a guide, a trusted and respected leader from within the firm
- the progress of each participant must be measurable
- participants need to be able to network with other emerging leaders outside the firm
- the program must be affordable and require minimal travel

THESE ARE THE CHARACTERISTICS THAT  
MAKE EMERGING LEADERS ACADEMY  
EXCEPTIONAL



# WHAT MAKES EMERGING LEADERS ACADEMY UNIQUE?

**H**ow do you gauge the success of a leadership development program? We believe the best measure is the changes observed in participants by those who work alongside them and know them best.

Since its inception, Emerging Leaders Academy has made a difference in the lives and careers of hundreds of our profession's rising stars. We know that because firm leaders have told us so, and we're confident your firm will have the same experience.

## 1 LEADERSHIP TRAINING FORUMS

During each year of the program, ten one-hour webinars led by Jeremy Clopton and Upstream Faculty provide a forum for discussing key principles of leadership.

Participants receive the PowerPoint, questions to consider, and other materials in advance of the presentation and access to the recorded presentation online afterward.

**Leadership Training Forums: Year Two**

- Personal Integrity: A Key Component of Great Leadership
- Avoiding the 10 Worst Habits of Otherwise Good Leaders
- Effective Delegation: How to Delegate Effectively
- Conducting Effective Performance Reviews
- Principles of Effective Coaching
- Client Management: Selecting and Keeping the Right Clients
- Business Development: Finding New Partners and Clients
- What All New Partners Need to Know
- Driving Change in Your Firm

**Leadership Training Forums: Year One**

- Setting and Accomplishing Worthwhile Goals
- Proactively Mapping Your Career
- Becoming a High Yield, Low Maintenance Firm Member
- Effective Use of Time, Energy, and Focus
- Capitalizing on Personal Strengths and Talents
- Becoming a Recognized Expert
- Performing Damage Control for Areas of Personal Weakness
- Helping to Make Client Transitions Successful
- Moving from Historian to Trusted Advisor
- The Proper Way to Build a Business Network

## 2 LEADERSHIP PROJECT

Each year, participants complete a challenging (10+ hours) leadership project that benefits the firm, and allows individuals or teams of emerging leaders to further develop important skills. Upstream assists by providing project advice, suggestions and examples, and guides work closely with participants to ensure accountability and accomplishment of the desired objectives.

## 3 GUIDES

The process of learning new principles and skills is almost always easier if accompanied by someone who's walked the same path. Firm leadership assigns emerging leaders to experienced guides, respected stakeholders from within the firm who work with participants throughout the two-year program to help them set and accomplish goals and complete assignments. Upstream Academy provides training and materials to individuals who are selected to serve as guides.

## 4 LEADERSHIP DEVELOPMENT GOALS

We believe leadership skills are best learned by "doing." Throughout the program, participants set and accomplish related goals after each Forum.

Upstream provides a list of potential goals after each Forum and participants choose a goal after each session to work on before the next forum. Participants complete all the goals chosen prior to the program year conclusion in May.

Guides work closely with participants, helping them select proper goals and holding them accountable for accomplishing those goals. With guide-ensured accountability, accomplishing challenging goals allows participants to apply what they've learned and give value back to the firm.

## 5 MEASURED PROGRESS

It's difficult to know if you're on course unless there's a way to measure progress. Upstream Academy provides tools (including an online "members only" page) for participants and their in-house guides that allow them to track progress on goals and projects throughout the year, network with other program participants and stay connected. Firms also receive guidance on best practices for creating an organized, efficient process in-house to help their emerging leaders grow during this two-year period.

**Online Progress Tracker (OPT) - Participant Status**

2018 - Class of 2018 Year 1

Leadership Training Forums

Please note all Leadership Training Forums will be held at 12:00pm Pacific, 1pm Mountain, 2pm Central, and 3pm Eastern.

	Completed	Questions	Guide
Using Time Wisely: Key Principles of Time Management	4/20/2015	<input type="checkbox"/>	<input type="checkbox"/>
Personal Integrity: A Key Component of Great Leadership	7/6/2015	<input type="checkbox"/>	<input type="checkbox"/>
Capitalizing on Personal Strengths and Talents	8/3/2015	<input type="checkbox"/>	<input type="checkbox"/>
Performing Damage Control for Areas of Personal Weakness	8/3/2015	<input type="checkbox"/>	<input type="checkbox"/>
Setting and Accomplishing Worthwhile Goals	10/16/2015	<input type="checkbox"/>	<input type="checkbox"/>
Basic Contributions to the Firm: Budgets, Billings, Collections and Ideas	11/16/2015	<input type="checkbox"/>	<input type="checkbox"/>
Client Management: Selecting and Keeping the Right Clients	12/17/2015	<input type="checkbox"/>	<input type="checkbox"/>
Moving from Historian to Trusted Advisor	1/10/2016	<input type="checkbox"/>	<input type="checkbox"/>
Providing Exceptional Client Service	2/18/2016	<input type="checkbox"/>	<input type="checkbox"/>
Helping to Make Client Transitions Successful	5/18/2016	<input type="checkbox"/>	<input type="checkbox"/>

Questions to Consider OPE Instructions PowerPoint Polaris Video

### NEED MORE INFORMATION?

To register for a free informational webinar or receive access to a recording, contact us at 406-495-1850 or [info@upstreamacademy.com](mailto:info@upstreamacademy.com).

# WHAT MAKES EMERGING LEADERS ACADEMY UNIQUE?

## 6 FREE REGISTRATION AT ONE VIRTUAL AND ONE IN-PERSON CONFERENCE EACH PROGRAM YEAR

Networking with peers in a stimulating group environment is an important experience for all professionals, and especially for future firm leaders.

Each year ELA participants will attend a virtual conference with interactive sessions and networking opportunities (all from the comfort of home or office).

Participants will also have the option of attending a two-day in-person conference each year. Always one of the most high-rated aspects of the program, conferences provide a way for participants to network with peers in a stimulating group environment, share insights and gain insights on both current and future firm issues, so they can bring new energy, ideas and best practices back to the firm.

The Emerging Leaders Conferences feature more interaction and discussion than most industry events. We highly encourage attendance, since each conference is geared to issues relevant to emerging leaders and how they can make the most of their careers.



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

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## 7 EXPERIENCED CONSULTANTS

Jeremy Clopton brings many years of leadership and consulting experience to this exciting program.

**Jeremy Clopton**, Director at Upstream Academy, has a passion for engaging all generations to move their firms forward. His real-world experience comes both as a consultant and in the audit department of a top accounting and consulting firm and he uses this experience to provide a vision for improvement.

**Upstream Faculty**, respected Managing Partners, Partners and Consultants in the Accounting industry serve as guest speakers for key sessions, bringing practical experience and insights from real-firm experience, ensuring participants receive a well-rounded approach to firm management.



## 8 PROVEN EXCELLENCE AND AN UNCONDITIONAL GUARANTEE

Emerging Leaders Academy has a proven track record of providing exceptional leadership development. Since 2007 the program has graduated over 850 people from 190 firms.

We're confident that Emerging Leaders Academy will be of immeasurable value to your firm and its future leaders. 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.

Registration is \$3,900 per year (\$3,300 for UAN members).

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