EMERGING LEADERS ACADEMY

A Two-Year Program for New & Upcoming Partners

New program year begins each June
Registration deadline June 1st

To register, visit https://upstreamacademy.com/ela
Contact us at info@upstreamacademy.com or (406) 495-1850

UPSTREAM ACADEMY

Our Profession
Is Standing on the Threshhold of
Dramatic Change

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 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 their concerns and what they need in a program to prepare emerging firm leaders.

ELA is built on those needs.

Helping You Develop High-Yield, Low-Maintenance Partners

Emerging Leaders Academy ensures leaders achieve consistent growth through:

- continuous learning, delivered in digestible doses throughout the year
- applied learning with challenging goals
- customizable options to meet individual and firm needs
- involvement of firm leaders in the training to help apply lessons learned
- measurable progress with integrated tracking tools
- networking opportunities with other emerging leaders outside the firm
- affordability with minimal travel requirements

These Are the Characteristics That Make Emerging Leaders Academy

Exceptional

The Emerging Leaders Academy is part of our Upstream Leadership Academy programs. Our New Manager Academy and Advanced Partner Academy cater to individuals at different points in their career. Look into our other academies to help your team grow through every step of their careers.

What's Included

1. Leadership Training Forums

During each year of the program 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 on-demand, CPE-eligible presentation online afterward.

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.

Forums Year 1

- Setting and Accomplishing Worthwhile Goals
- Proactively Mapping Your Career
- Effective Use of Time, Energy, and Focus
- Becoming a High Yield, Low Maintenance Firm Member
- 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

Forums Year 2

- Personal Integrity: A Key Component of Great Leadership
- Avoiding the 10 Worst Habits of Otherwise Good Leaders
- Effective Delegation: How Leaders Help Others Grow
- Conducting Effective Performance Evaluations
- Principles of Effective Coaching
- Client Management: Selecting and Keeping the Right Clients
- Business Development: From Opportunistic to Intentional
- What All New Partners Need to Know and Understand
- Driving Change in Your Firm

3. Leadership Development Goals

Throughout the program, participants set and accomplish related goals after each Forum. Upstream provides a list of potential goals, allowing participants to apply what they've learned and give value back to the firm. Participants complete their goals prior to each program year's conclusion.

4. Guides

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.

5. Measured Progress

Upstream provides tools (including an online "members only" page) for participants and their guides that allow them to track progress on goals and projects throughout the year, network with other program participants, and stay connected.

What's Included

6. Virtual Conference

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

7. In-Person Conference

Participants also attend a two-day in-person conference each year. Always one of the most highly-rated aspects of the program, conferences provide a way for participants to network with peers in a stimulating group environment and gain insights on both current and future firm issues.

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

8. Experienced Consultants

Jeremy Clopton the Managing Director of Upstream Academy, brings many years of leadership and consulting experience to this exciting program. He has a passion for engaging all generations to move their firms forward. His real-world experience includes working 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 are respected Managing Partners, Partners and Consultants in the Accounting industry who 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.

9. Proven Excellence

Emerging Leaders Academy has a proven track record of providing exceptional leadership development. Since 2007, the program has graduated nearly 1500 participants from hundreds of firms.

10. Unconditional Guarantee

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.

Participant Testimonials

"This is one of the best conferences that I have ever attended in many years of public accounting. All three of the presenters were very enthusiastic and very knowledgeable. I greatly enjoyed it. If anything, I wished it was a little longer."

Eric VanDop, Brickley Delong, P.C.

"Each of the discussions felt timely and poignant - will definitely be taking these concepts back to the office! As always, the breakout sessions and ability to network with people from other firms is invaluable and very appreciated!"

Shelby Lesseig, Seidel Schroeder

"The ELA program was inspirational and gave me some good ideas on how I can make more meaningful contributions to my firm and my own career!"

Kevin Hernandez, Sensiba LLP

"The ELA program was amazing and very beneficial to me as I transitioned into the role of partner. I highly recommend!"

Ryan Lubinski, KSM CPAs & Advisors

"Jeremy Clopton is a smooth speaker who gives time between thoughts to really absorb the information. Really enjoyed listening to his knowledge of the strategies presented."

Alicia McDonald, Ward & Uptigrove

Sign up an Emerging Leader from your firm for $4600 ($3900 UAN) each year

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with a registration deadline of June 1.

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NEED MORE INFORMATION?

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

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