



HELPING DRIVE FIRMS
TO HIGH PERFORMANCE

HIGH PERFORMANCE FIRMS



A COMPREHENSIVE
RESULTS DRIVEN
PROGRAM FOR
FIRM LEADERSHIP TEAMS

IF WHAT YOU'RE DOING NOW
WAS GOING TO TAKE YOU TO "GREAT,"
YOU'D ALREADY BE THERE.

From working with hundreds of firms across North America, we know that most good firms sincerely want to become great. They just struggle to get on and stay on this path.

They've tried lots of things. Flavor of the month ends with disappointment. Trial and error seems always to be heavy on the error side. And the strategy of hope has little actual strategy involved.

Upstream Academy is all about helping good firms like yours become better. It's what we do and who we are. Our track record helping good firms become great firms is second to none.

We can help you too.

We have proven tools and processes. We'll help you create a plan uniquely suited to your particular circumstances. We'll help you set and accomplish meaningful goals to move you uncompromisingly along the path to great. We'll help you develop the discipline to get your firm where you know it needs to be.

High Performance Firms will help your firm make significant, measurable progress on the path to improvement, teach you what you need to do on an ongoing basis to stay on that path and provide the on-going tools and resources to keep you moving forward.

It's time to abandon the strategy of hope.



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IT TAKES MORE THAN A SINCERE DESIRE AND A WILLINGNESS TO WORK HARD TO BECOME A HIGH PERFORMANCE FIRM

So what can your team expect from the **High Performance Firms** program?

- A diagnostic evaluation of your specific needs to help you prioritize areas of improvement and create a step-by-step plan for improvement
- On-demand educational courses for your firm's leadership team that cover a wide range of firm issues and suggestions specific to your path
- An evolving library of tools, documents and training to help you implement processes and best practices learned
- Expert advice geared toward your firm-specific goals from Upstream advisors with experience helping firms on the journey to high performance
- A growing community of other non-competing high-performance firms to enable sharing and discussion
- The ability to move your firm's dial and improve culture, processes and financial performance.



Who should register? This program is ideal for firm leadership teams wishing to move their firms forward each year.

What is the timeline? Your firm can join any time and receive access to the library of courses, tools and documents. The billing period runs year to year beginning on the first day of the quarter.

What is the cost?

Base – \$5,500 for the first year (requires UAN membership)

Level 1 – \$9,500 per year (requires UAN membership)

- 15 spots available
- Quarterly hour-long meetings with firm leadership to discuss challenges and strategy

HPF Alumni – \$4,500 per year if you have participated in the past

WITH VISION AND DISCIPLINE,
YOUR FIRM CAN JOIN THE
HIGH PERFORMANCE FIRMS

KEY ELEMENTS OF *HIGH PERFORMANCE FIRMS*

With Upstream guidance and the program's innovative tools, powerful processes, and outstanding training your firm can develop habits required for meaningful results and become healthier and more profitable year by year.

1 Diagnostic Evaluation of Firm-Specific Needs

A comprehensive diagnostic evaluation of firm strengths and areas of improvement help you create a plan for improvement.

This self-assessment completed by firm stakeholders allows you to analyze firm performance in the *Six High Performance Areas of Discipline*: Leadership, Financial Performance, Partner Effectiveness, Team Development, Client Management and Business Development. The report provided will help guide next steps. (The 5 Behaviors for Intact Teams is an optional add-on.)

2 On-Demand Educational Courses

Upstream provides guidance on an educational path based on your firm-specific diagnostics.

All firm members have access to on-demand educational courses on the *Four Pillars of High Performance Firms* (Culture, People, Clients and Growth) and on the *Six High Performance Areas of Discipline* (Leadership, Financial Performance, Partner Effectiveness, Team Development, Client Management and Business Development). Each course deals with a specific firm issue and guides you to the correct tools and resources to help you put lessons into practice.



3 Tools and Resources

An evolving library of processes, sample documents, and tools help you implement best practices in your goal areas. Over 20 documents, including support for:

- Bench strength analysis
- Career mapping
- Partner evaluations
- Partner compensation
- Client acceptance and removal policies
- Succession planning

4 Virtual Community

Program participants are part of an evolving virtual community made up of other firms in the program with several opportunities for collaboration.

- A virtual space to share best practices and solutions with a cohort of 8-10 non-competitive similarly-sized firms .
- An HPF specific session at our HeadWaters Leadership Conference (additional registration required)
- Quarterly community meeting on key HPF topics.

5 Customized Advisory Guidance

Expert advice given during regular group meetings provide an opportunity to discuss challenges and strategy and ensure accountability to goals.

Level 1 add-on - Quarterly meetings with firm leadership (60 minutes)

Need more information?

Contact us at 406-495-1850 or info@upstreamacademy.com.