



HELPING DRIVE FIRMS
TO HIGH PERFORMANCE



HIGH PERFORMANCE FIRMS



A 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.

If there's one thing we've learned from working with hundreds of firms across North America, it's this: most good firms sincerely want to become great. They just don't know how to get there.

They've tried lots of things. Flavor of the month doesn't work. Trial and error seems always to be heavy on the error side. And the strategy of hope isn't much of a strategy.

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

We can help you.

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 reach deep within and develop the discipline to get your firm where you know it needs to be, where it surely can be, and where it must be to thrive in today's business world.

High Performance Firms will help your firm make significant, measurable progress on the path to improvement. It will also teach you what you need to do on an ongoing basis to stay on that path.

It's time to abandon the strategy of hope.



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WHILE HOPE MAY BE A WONDERFUL VIRTUE, IT'S A POOR STRATEGY

The desire to get better is nothing new. Over the past two decades of helping firms just like yours, we've seen it thousands of times. You've undoubtedly felt it in your organization, hoping that somehow the kind of forward progress you always knew was possible for your firm would actually occur. And yet, it didn't happen. Why?

The strategy of hope has never produced a high performance firm. And it never will.

Becoming a high performance firm takes more than sincere desire and a willingness to work hard. It takes correct principles, proven processes, exceptional tools, and a "leave nothing to chance" approach. And that's what **High Performance Firms**, Upstream Academy's results driven program for firm leadership teams, is all about.

High Performance Firms helps firms overcome their unique barriers and become high performing through continuous improvement. The program's innovative tools, powerful processes, and outstanding training will help your firm develop the habits required for meaningful results and become healthier and more profitable.



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

- A multi-year program that includes four high level, workshops attended by the firm's implementation team (at least three leaders)
- Upstream Academy guidance between workshops to help you accomplish your customized goals
- The tools, documents and training needed to implement the processes and best practices learned at each workshop
- Experienced consultants and instructors (Sam Allred and Jeremy Clopton) with decades of experience helping firms on the journey to high performance
- The ability to move your firm's dial and improve financial performance.

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

CULTURE

WORKSHOP 1

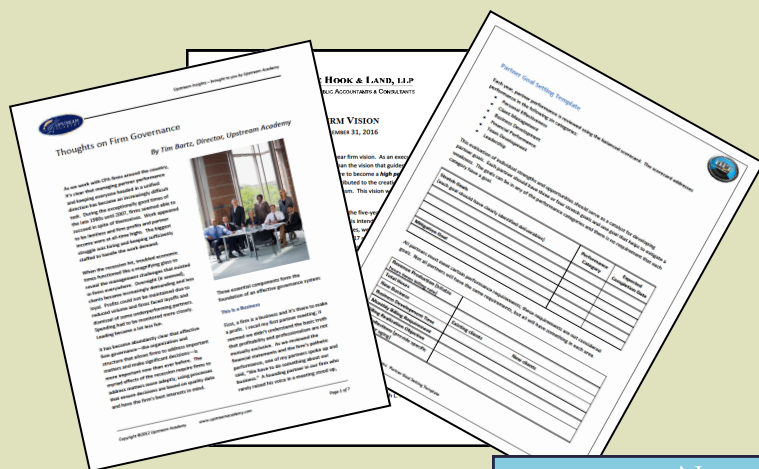
Firms don't accidentally become high performance. It always begins with a vision that excites the partners and a solid strategy that helps team members understand their roles. Proper plan execution paves the way for early improvement in firm health and profitability and encourages everyone to stay the course.

Partners play a critical role in the journey to high performance because they possess a greater depth of skill, knowledge, experience, and confidence than any other group in the firm. We call this partner horsepower. It's impossible to create a high performance firm without first creating high performance partners.

The primary purpose of Workshop #1 is to provide leaders with the vision, strategic plan, financial metrics, tools, and processes necessary to optimize partner horsepower and start down the path to high performance.

What High Performance Looks Like at a Partner Level

- Firm leaders proactively assess and work to improve firm culture
- Partners do only partner level work, creating growth opportunities for those below them in the firm
- Every partner receives an open, honest evaluation that provides meaningful feedback on strengths and weaknesses in each key area
- A superior goal setting process requires each partner to collaboratively set five stretch goals that tie to the firm's strategic plan and to individual strengths
- A system of accountability keeps partners focused on their stretch goals year-round
- Successful completion of partner goals is tied to partner compensation
- Partner income is significantly above industry standards



PEOPLE

WORKSHOP 2

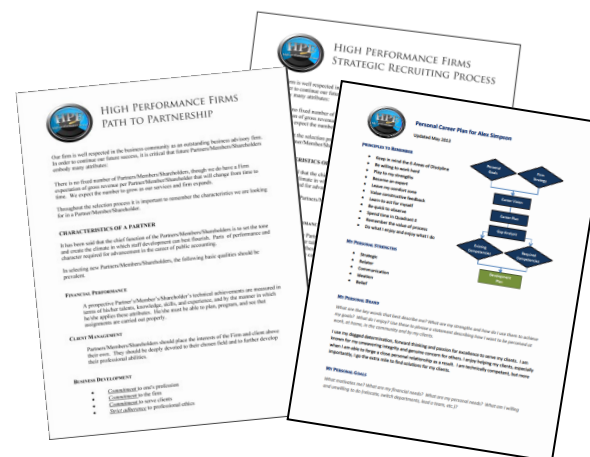
Your team members are the firm's future. As a leader, you recognize that each one possesses a unique combination of strengths and weaknesses. You also know that playing to team members' strengths will always produce the best results, both individually and for the firm. But how do you do that?

Too many firms have great talent but lack direction, effectively hobbling the ability of leaders to move the firm to higher ground. Little is done to develop bench strength, the passage of time is viewed as the firm's most effective agent of change, and parity—the ultimate enemy of a high performing environment—reigns supreme.

The primary purpose of Workshop #2 is to provide leaders with the vision, tools, and processes necessary to use team member strengths to grow the firm.

What High Performance Looks Like at a Team Member Level

- Partners have identified the firm's future leaders (bench strength) and there is a personalized leadership development plan for each of these emerging leaders
- Empowered employees are well trained and confident in handling engagements
- The firm's path to partner is clearly defined
- The partner group is unified in its willingness to treat top performers differently
- Leaders select and lead high performing teams with high performing individuals
- Strategic recruiting produces team members with high performing traits
- The best people in the firm are consistently matched up with the best opportunities
- The firm has a higher than average retention rate for experienced (3-5 years) people



NEED MORE INFORMATION?

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

CLIENTS

WORKSHOP 3

Virtually every firm talks about providing exceptional client service. Relatively few, however, actually accomplish this goal. It's impossible to develop a reputation for exceptional service if only part of the team wants to or knows how to deliver at that level. It takes a total team effort and unrelenting consistency to establish and keep a reputation for exceptional service.

Providing amazing client service is a choice that high performance firms make. It begins with understanding that you can't provide amazing service to D clients. It continues with the acknowledgment that all clients are not created equal nor should they be treated equally. Your best clients deserve your best people, ideas and time.

The primary purpose of Workshop #3 is to help leaders understand amazing client service and give them the tools to provide it.

What High Performance Looks Like at a Client Service Level

- All clients are evaluated and identified as A, B, C, or D level
- Client centered processes drive value to each client with maximum efficiency
- There is a written plan for serving each A client
- A plan is in place to improve relationships with B and C clients and transfer D clients
- Efforts are focused on increasing average revenue per client
- Minimal process variation produces consistent, high quality service
- There is a team approach to serving all A and B clients
- Processes and services are driven by the voice of the client

The image shows three documents. The first is a 'HIGH PERFORMANCE FIRMS CLIENT CATEGORIZATION' chart with columns for Client Name, Firm, Size, Age, and a grid for Client Category (A, B, C, D) across various service areas. The second is a 'High Performance Firms Bottom 30 Exercise Sample' table with columns for Client Name, Firm, Size, Age, and a grid for Client Category (A, B, C, D) across various service areas. The third is a 'STRIKE, HOOK & LAND, LLP Initial Client Service Plan' document, which is a detailed plan for a client named 'STRIKE, HOOK & LAND, LLP' and includes sections for 'Client Key Leadership Team', 'Client Organization Chart', and 'Client Service Plan'.

WORKSHOP 4

GROWTH

The lifeblood of any firm is new clients and new engagements from the best clients. The capability to do great work doesn't mean you're going to get that work. Playing the numbers game, hoping to win "your share" of engagements is risky, time consuming and stressful.

A firm can never be high performance without a strong culture of business development. Every team member plays an important role in such a culture, consistently giving his/her best effort. Those who have the greatest talent for business development receive the best opportunities to do it at a very high level. All team members understand their role in landing A level clients and engagements.

The primary purpose of Workshop #4 is to provide leaders with the vision, tools, and processes necessary to create a culture of business development throughout the firm.

What High Performance Looks Like at a Business Development Level

- Rainmakers are freed up to spend the majority of their productive time on business development
- All leaders follow written personal business development plans
- A non-negotiable screening process is followed to ensure that only quality clients are accepted
- Effective pipeline meetings are held regularly
- Every professional can deliver a marketing message that differentiates the firm
- A strong business development culture exists firm-wide
- An effective "rainmaker-in-training" program is in place
- There is a proactive plan to connect clients to an increased number of firm services
- The firm's best referral sources are clients who are raving fans

The image shows two documents. The first is a 'STRIKE, HOOK & LAND, LLP' document, which is a detailed plan for a client named 'STRIKE, HOOK & LAND, LLP' and includes sections for 'Client Key Leadership Team', 'Client Organization Chart', and 'Client Service Plan'. The second is a 'HIGH PERFORMANCE FIRMS PERSONAL BUSINESS DEVELOPMENT PLAN' document, which is a detailed plan for a client named 'STRIKE, HOOK & LAND, LLP' and includes sections for 'Client Key Leadership Team', 'Client Organization Chart', and 'Client Service Plan'.