



**A Customized Virtual BootCamp to Help Your Firm Successfully
Launch a New Service Line, Industry Specialty or Niche**

Take a “leave nothing to chance” approach to building a new service line.

As our profession changes, virtually all strong organic growth in firms across North America is being fueled by advisory services. As your firm moves away from traditional services to a more advisory approach, are you struggling to find the right formula to develop and grow successful, profitable niche offerings? Don't recreate the wheel.

During the *Launching New Services* BootCamp we'll show you a proven process to find and vet new ideas, determine pricing, build support, and get clients excited about your new offering.

Launching New Services will take the guesswork out of the process so you can consistently find and build new service lines, industry specialties and niches with a comprehensive guided process for success.



Who should attend? The objective of this BootCamp is for you to launch a successful service line. To accomplish this, it takes more than one person. It is important you have a team of individuals working together toward this goal, your *Launch Team*. The size of the *Launch Team* is up to you, and the *BootCamp* is designed for that team.

What can you expect? Jeremy and Heath will use a combination of presentation, customized planning tools and assisted firm brainstorming sessions to provide a step-by-step guide to creating a successful and profitable service line for anything from litigation services to IT consulting to financial planning to industry niches.

What is included? Firms will follow a three-step process that results in a customized plan for launch at the conclusion of the program:

- An online tutorial for firm leaders and your *Launch Team*
- Homework to be completed by the firm and your *Launch Team*
- 10 hour virtual workshop attended by your *Launch Team* with additional consultation time in the afternoon while your firm works on its launch plan

When does the program start? Contact us to schedule a time for your firm's BootCamp

What is the cost? The registration fee is \$20,000 for your firm's *Launch Team* (\$17,000 for UAN Member Firms). Anyone from the firm can participate for this price.

Learn a step-by-step process to create a profitable, innovative, new service line or industry specialty.

Key Elements of *Launching New Services*

During this program, you'll create a comprehensive plan to create your service line or industry specialty, and receive the tools and training to launch successfully.

1 Launching New Services 101

When you register for the program, you'll gain access to an online tutorial that will walk you through how to plan for the workshop and how to complete the BootCamp Preparation Workbook.

You'll also receive resources to help you facilitate an in-house ideation session that can help you determine potential areas of impact for a new service line, industry specialty or niche. We anticipate that the innovation processes could provide a pipeline of innovative ideas long after the BootCamp.



The objective of the online tutorial is to provide you the foundation you need to prepare for the BootCamp.

- What service line, niche or industry specialty should you develop?
- How can you identify the need in your client base?
- How do you find existing expertise?
- How do you determine goals for the new area?
- What's the time frame for building and launching the service?

2 BootCamp Preparation

Before firm members attend the virtual workshop, we'll lay the groundwork for success. Upstream will provide guidelines for launching a successful service line. Using a planning platform, we'll help you:

- Define the service line, niche or industry specialty
- Select service line owners
- Identify goals
- Explore possible revenue streams
- Identify competitors and pinpoint your firm's differentiators
- Identify leadership and choose your ideal team attributes
- Draft initial KPIs

The *Launch Team* will work through the BootCamp Preparation to ensure that they arrive at the virtual BootCamp ready to work and can leave with a complete plan to launch your service line.

Optional: Facilitated Innovation

If you'd like assistance jumpstarting your firm's next big idea, Upstream facilitators can host a three-hour ideation session to help you not only identify ideas for the workshop but form a pipeline of innovation for the future.

This facilitated Innovation Tournament will help participants better understand what innovation is and learn a real-world process for consistently generating and vetting innovative ideas. To host a successful tournament, firms should identify 10-20 firm members from various levels and backgrounds to form your *Innovation Team*.



Need more information?

Contact us at info@upstreamacademy.com

Key Elements of *Launching Data Analytics*

3 Virtual BootCamp

Those selected for your firm's *Launch Team* will meet virtually for a five-day *Launching New Services BootCamp*. Each day participants will learn key concepts necessary to launch a service during a two-hour virtual session.

Topics will include how to generate innovative ideas, the challenges in starting a new service, strategies to overcome these challenges, personnel training, marketing the service both inside and outside the firm, sustainability, and profitability.

Teams will then work on their firm's plans and receive one-on-one feedback and consultation hours with Jeremy and Heath.

Attendees will leave the *BootCamp* with a plan and the tools they need to launch a successful and profitable service.

4 Unconditional Guarantee

We're confident that *Launching New Services* 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.



Day One: Defining the Service Line

- Welcome and Introductions
- Beginning with the End in Mind
- Generating New and Innovative Service Ideas
- Vetting New Service Ideas

Day Two: Building a Profitable Service Line

- Determining the Ideal Pricing Model
- Using leverage to drive profitability
- Pinpointing What Makes You Better

Day Three: Building the Foundation within the Firm

- Creating Alignment with Firm Leadership
- Designing Your Ideal Team
- Recruiting an Executive Sponsor and Internal Advocates
- Planning for Growth within the Firm

Day Four: Getting Your Services in Front of Your Clients

- Marketing Strategically Pre-Launch
- Marketing Strategically Post-Launch
- Driving Client and Pre-Client Actions through Marketing
- Developing Business as Trusted Advisors

Day Five: Putting It All Together

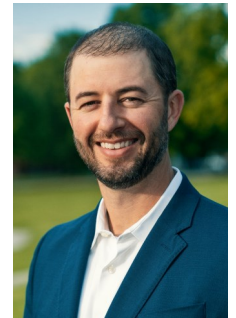
- Navigating the Process of Change and Creating a Plan
- Golden nuggets

5 Experienced Instructors

Jeremy Clopton, Director at Upstream Academy, gained his real world experience at one of the top accounting and consulting firms in the country, where he led the firm-wide Big Data & Analytics practice. During his 12 years there, Jeremy gained extensive experience in data analytics, fraud prevention, and business intelligence, but his real passion was going beyond providing the services clients asked for – to help them determine what they needed for future success.



Heath Alloway, Director at Upstream Academy, spent more than 13 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 success by focusing on growth and innovation.



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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