



NEW MANAGER ACADEMY

An Advanced Skill Accelerator for New Managers

New program year opens each June
Registration deadline June 1st

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



OUR MEASURE OF SUCCESS IS NOTICEABLE, **POSITIVE CHANGE**

The single biggest issue facing our profession is engaging, retaining, and developing enough of the right people. Unfortunately, those with 4-7 years experience can be a flight risk - and losing your high-potential individuals just as they've stepped up to Manager can have long-term negative repercussions for your firm.

New Manager Academy is designed to help you engage high-potential, newly-promoted Managers, and accelerate their training so they can more quickly and effectively manage both people and engagements.

ENGAGE, ADVANCE, AND RETAIN YOUR **BEST**





New Manager Academy ensures your brightest team members consistently grow 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 new managers outside the firm
- affordability with minimal travel requirements

**DON'T LEAVE THE DEVELOPMENT OF
A STELLAR CAREER TO
CHANCE**



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

WHAT'S INCLUDED

1. TRAINING FORUMS

The program features webinars led by Jeremy Clopton and Upstream Faculty, which provide incremental training on key skills. To increase engagement in the monthly forums, participants are asked to commit to responding to key questions that tie to the topic during a live session.

2. ACTION PLANS

Throughout the year, participants set and accomplish goals after each training forum. Guides work closely with participants, helping them select proper goals and holding them accountable for accomplishing those goals.

Forums

- Understanding Responsibilities and Expectations
- Developing Those You Lead
- Setting Clear Expectations
- Giving Timely Effective Feedback
- Building High Trust Relationships
- Prioritizing the Right Things
- Effectively Managing Stressful Situations
- Facilitating Better Discussions and Decisions
- Managing Stressful Client Engagements

Who Should Register?

This program is ideal for Managers wishing to become more effective in their roles. Participants should be prepared to be actively engaged in improving skills and applying lessons learned to their careers.

3. VIRTUAL CONFERENCE

At the midpoint of their NMA experience, participants will attend a virtual conference with interactive sessions and networking opportunities (all from the comfort of home or office).

4. IN-PERSON CONFERENCE

Participants also attend a two-day in-person conference at the conclusion of their NMA journey.

Always one of the most highly-rated aspects of the program, this conference 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 New Manager Conference features more interaction and discussion than most industry events. We highly encourage attendance, since the conference is geared to issues relevant to new managers and how they can make the most of their careers.



WHAT'S INCLUDED

5. 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 knowledge and insights from real-firm experience, ensuring participants receive a well-rounded approach.



6. GUIDES

Firm leadership assigns new managers to experienced guides, respected stakeholders from within the firm who work with participants throughout the 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.

7. MEASURED 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 throughout the year, network with other program participants, and stay connected.

8. 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



"EVERY topic was very relevant to the position I am now. I enjoyed the interactions & hearing about what other firms/managers are dealing with too."

Kara Hutcheson, Rea & Associates, Inc.



"Jeremy and Jonathan are fantastic at what they do. The insights they provide rival the mastery of their presentation skills."

Michael Blankman, Donovan CPAs & Advisors



"The New Manager Academy helped set a vision for my career and I would recommend it to any manager looking to progress in their career."

James Watkins, Moore Colson



"Phenomenal job by the whole team. I learned a lot and would go back!"

Tom Shields, GRF CPAs & Advisors



"Jeremy and Jonathan both did a fantastic job of framing topics that tend to be a bit scary into something that felt manageable and attainable. The session topics were relevant to issues facing managers."

Bridget O'Neal, Kassouf & Co.



Sign up a New Manager from your firm for \$4600 (\$3900 UAN)

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

To register visit www.upstreamacademy.com/nma/

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.



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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