



**An Advanced Skill Accelerator Program for  
New Managers in Accounting Firms**

# The true measure of a development program is whether you see a 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.

The primary measurement of success for this program will be the noticeable difference in skills, confidence and ability witnessed by participants and firm leaders who work alongside them.



**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.

**What is the timeline?** The registration deadline for this one-year program is June 1 with the first events in late June. The program will run through May of next year.

**What is included?** This program features incremental, consistent training throughout the year:

- Nine forums designed to teach key Manager proficiency topics
- Guidance in creating action plans after each training forum to ensure skills are put into practice
- A 1 ½ day in-person event designed to take a deep-dive into key Manager skills and encourage networking and innovation
- Three advanced training sessions for participants' guides

Accelerate new Manager  
training to engage, advance and  
retain your best.

# Key Elements of the *New Manager Academy*

**D**on't leave the development of a stellar career to chance. Take a "leave nothing to chance" approach to developing new Manager skills, confidence and ability.

## 1 Training Forums

Over the course of the one-year program, participants will receive incremental training on key skills during one-hour webinars led by skilled Upstream presenters.

Participants receive the PowerPoint and questions to consider in advance of each presentation and access to the recorded presentation online afterward.

### Training Forum Topics

- 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 Successful Client Engagements

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.

After the Upstream presenter has provided training and instruction on the competency, assigned participants provide their thoughts/insights/experiences.

## 2 Action Plans

We believe skills are best learned by "doing." 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. With guide-ensured accountability, accomplishing challenging goals allows participants to apply what they've learned and give value back to the firm. Participants complete all the goals chosen prior to the program year conclusion in May.

## 3 New Managers Conference



Networking with peers in a stimulating group environment is an important experience for all professionals.

Program participants attend a two-day in-person *New Manager Conference*, at the program's conclusion in May. This highly-interactive 1½ day conference allows participants to network with peers, share thoughts and gain insights on both current and future firm issues so they can bring new energy, ideas and best practices back to the firm.

During the event, participants work together to solve problems they'll face as new managers, working with different groups throughout the conference to encourage collaboration, innovative thinking and networking with as many peers as possible.

**Need more information?**

Contact us at 406-495-1850 or [info@upstreamacademy.com](mailto:info@upstreamacademy.com).



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## 4 Guides



The process of learning new principles and skills is almost always easier if accompanied by someone who has previously walked the same path.

The firm assigns participants an experienced in-house guide to work with them throughout the program to help participants set and accomplish goals and complete assignments. Upstream Academy provides three virtual training sessions for the individuals who are selected to serve as guides.

## 5 Unconditional Guarantee

We're confident that *New Manager Academy* 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.



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## 6 Experienced Consultants

Jeremy Clopton brings many years of leadership and consulting experience to this exciting program.

**Jeremy Clopton**, Director at Upstream Academy, has a passion for engaging all generations to move their firms forward. His real-world experience comes both 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. To ensure participants receive a well-rounded approach to firm and team management, we will bring in experts and thought-leaders to discuss topics specific to their experience and expertise.



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

Upstream Academy is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: [www.nasbaregistry.org](http://www.nasbaregistry.org).

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