

A green icon consisting of a vertical stem with three leaves at the top and a keyhole shape at the bottom.

FULL
potential
COACHING



**A Program Designed to Help Firm Coaches
Accelerate Development of Their Top People**

Help your best people find purpose, passion and expertise

What do your coaches need to know to help your top people maximize their strengths, manage around their weaknesses, set effective goals, and become more effective, productive and inspired to excel? What does it take to be the kind of coach who truly makes a difference in people's lives and careers?

The *Full Potential Coaching* program will help coaches learn and apply skills to accelerate the development of your future leaders — positively impacting retention, creating rewarding career opportunities, and improving overall firm success.



Who should attend? The program is ideal for new and experienced firm coaches passionate about making a difference for those they coach and creating a culture of giving and receiving open and honest feedback.

What can you expect? Heath will use a combination of individual assessment, presentation, strategic planning and coachee training to develop skills, confidence and ability.

What is included?

- Pre-program planning survey
- Four two-hour, virtual training sessions
- Assistance in assessing and improving bench strength
- Archived webinar for coachees
- Post-program assessment

When does the program start? The program launches September 23. Prior to the program start, individuals spend 30 minutes doing pre-work, so they are ready for the first session.

What is the cost? The registration fee is \$5,900 for up to ten participants from your firm (UAN \$5,000) or \$1,800 (UAN \$1,500) for an individual

Elevate coaching relationships to make a difference in both lives and careers

Key Elements of *Full Potential Coaching*

During this program, participants will assess and improve their coaching skills, create a proactive plan to improve the firm bench, and learn how to develop a more impactful coaching relationship.

1 Pre- and Post-Program Survey Assessment



Participants will complete a pre-program survey designed to help them identify their individual coaching hurdles, opportunities, and goals. Upstream will provide resources to help participants create a plan to improve coaching success.

To assess progress and identify next steps, participants will complete a post-program survey.

2 Assistance Assessing and Improving Firm Bench

Participants will work on a strategic plan for identifying and improving firm bench strength, implementing career mapping, identifying opportunities for delegation, using strengths and mitigating weaknesses, and setting goals with coachees.



3 Four Two-Hour Virtual Sessions

Each two-hour virtual session focuses on essential coaching principles and provides actionable steps to help individuals put insights into practice. Sessions start at 11 am Pacific (2pm Eastern).



The Coaching Foundation and Path for Potential September 23, 2024

- Understand coaching roles and setting expectations
- Abandon parity and build the bench
- Help coachees develop a career vision and map



Full Potential Coaching October 28, 2024

- Give and receive open and honest feedback
- Encourage development of a leader's voice
- Turn delegation and accountability into a win-win



Unlocking Full Potential Skills November 21, 2024

- Teach a high-yield, low-maintenance attitude
- Cultivate an advisory mindset
- Build business development skills



Coaching for Potential and Not Compliance December 16, 2024

- Structure meaningful coaching meetings
- Play to strengths and minimize weaknesses
- Effectively set goals and leave comfort zones

Need more information?

Contact info@upstreamacademy.com or visit our website at www.upstreamacademy.com.

Key Elements of *Full Potential Coaching*



4 Archived Webinar for Coachees

Participants will have access to an archived webinar to help those they coach understand their role in successful coaching relationships, how to receive feedback, and how to prepare for coaching meetings.

5 Unconditional Guarantee

We're confident that the *Full Potential Coaching* program 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.



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

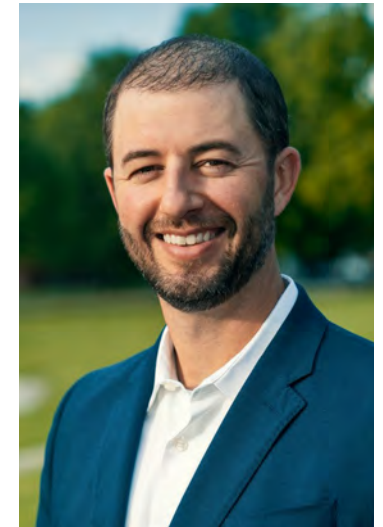
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6 Experienced Instructor

Thought leader for our profession, Heath Alloway, has years of experience helping firm members improve their coaching success.

He will help your firm apply coaching principles to your real-firm experience so you can see growth in your coaches and the people they are guiding.

Heath Alloway, Director at Upstream Academy, spent more than thirteen years at a top accounting and consulting firm, where he served as National Growth Manager and Director of Business Development. He worked closely with firm and industry leaders to position the firm for present and future success by focusing on growth and innovation. His passion for helping others succeed makes him a popular coach and speaker.



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