UPSTREAM™ ACADEMY

BD ADVISORY

A Program Designed to Help You Master Advisory Business Development

Done right, business development is a natural extension of serving your clients.

The highest-performing organizations have three things in common—a systematic but flexible framework for developing client relationships, consistent investment in skill development, and commitment to building an advisory mindset culture. Approaching business development with an advisory mindset helps firms serve clients, develop professionals, and achieve financial success.

So, if business development is this important, why do so many firms see limited success?

Join us for *Advisory Business Development*. The program will alleviate misconceptions, help you enhance your advisory process, and provide coaching on BD skills, so business development becomes repeatable, your BD practice becomes more efficient, and you can focus on helping clients with their top goals and issues.

Who should attend? This program is ideal for managers, senior managers and new partners who wish to advance their business development skills and improve their advisory ability by learning, applying those lessons and receiving feedback.

What can you expect? Heath and Amy will use a combination of presentation, customizable planning tools and peer-to-peer sharing to provide a step-by-step guide to creating a successful, individualized business development process. They will then help firms apply these skills through on-going coaching in BD skills.

What is included? Individuals will follow a three-step process that results in a customized plan for both current and ongoing business development based on an advisory approach:

- Pre-work to be completed by each individual prior to the first session
- Five two-hour, interactive webinars
- Three two-hour BD mastery coaching sessions

When does the program start? We will hold a one-hour introductory webinar on October 26 at 10am MT (12noon ET). The program will launch in January. Prior to the program start, individuals will need to spend 1-2 hours doing pre-work, so they are ready for the first session.

What is the cost? The registration fee is $1,250 per person or $5,000 for up to five participants from your firm. UAN members pay $1,060 and $4,250 respectively.

Enhance your BD advisory skills and confidence, while becoming more adept at helping your clients

Key Elements of *Advisory Business Development*

During this program, you'll create a comprehensive plan for improving your business development process and growing individual advisory skills.

1 Pre-Work Resources

When you register for the program, you'll gain access to an online tutorial to help you plan for the program.

The objective of the pre-work is to help you analyze your current process and gather the information you need for success.

This will include:

- Intelligence Inventory
- Relationships Inventory
- Data-Gathering Survey

2 Firm Resource

Your firm will receive access to a *Best Practices in Business Development* presentation that can be shared with anyone in the firm. The session will qualify for one hour of on-demand BD training and will summarize the key principles and take-aways from the program.

3 Virtual Classroom

Five two-hour sessions will teach advanced business development concepts. Each virtual session will include both proven processes and tips for practical application and will be recorded so you don't miss anything!

January 13, 2021: Creating Intelligence and the Advisory Mindset

- The Advisory Mindset and Process
- Trends Impacting Today's Decision-Makers
- Where to Invest Your Advisory Development Time
- Building Your Intelligence Matrix

May 12, 2021: Building Relationships

- Relationship Ecosystems and Buying Roles
- Strategic Growth through Meaningful Relationships
- Building Your Relationship Ecosystem Map
- Leading Advisory Conversations

July 14, 2021: Proposing

- Elements of a Winning Proposal
- Framework for Designing a Standout Proposal
- Winning without a Formal Proposal
- Presentation Strategies and Pitfalls

September 8, 2021: Gaining Commitment

- A New Lens on Being an Advisor
- 10 Ways to Improve Your Win Rates
- Serving, Advising and Retaining Raving Fans
- Action Planning and Your Next Steps

November 10, 2021: Applying Insights

- Opportunity and Spot Coaching
- Strategies to Consider for Your Firm
- Developing Future Advisory Development Leaders

Need more information?

Join us for a free informational webinar on October 26 at 10am Mountain (12noon Eastern)

Contact info@upstreamacademy.com to register.

Key Elements of *Advisory Business Development*

4 Coaching and Implementation Assistance

To ensure accountability for the goals you've set, to help you with any issues that arise, and to ensure you are able to implement the methodology learned during the program, the group will meet for three Virtual Mastery Classes throughout the year.

During these interactive Virtual Mastery Classes, your team will receive high-level training as well as individualized coaching during breakout sessions.

5 Unconditional Guarantee

We're confident that the *Advisory Business Development* 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.

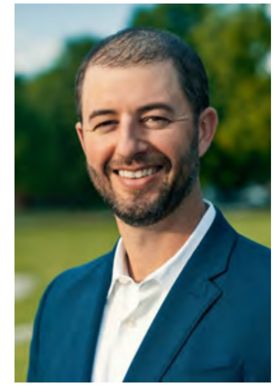
NATIONAL REGISTRY OF CPE SPONSORS

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.

6 Experienced Instructors

Thought leaders for our profession, Heath Alloway and Amy Franko, have years of experience helping firm members improve their business development success.



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. 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 present and future success by focusing on growth and innovation. His passion for helping others succeed makes him a popular coach and speaker.

Amy Franko is CEO of Amy Franko Associates, a consultancy that helps professional services firms accelerate growth results through business development strategy and skill development. She has worked with some of the world's most recognizable brands and she used her 20 years of client-facing sales experience to write, *The Modern Seller*, an Amazon best-selling book. She is recognized by LinkedIn as one of their Top Sales Voices. A popular blogger, keynote speaker, and podcast guest, she has been featured in *Accounting Today*, *CPA Trendlines*, *Simply Tax*, and the Association of Accounting Marketing's *Growth Strategies.*

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