High Performance Firms FAQ (AGN)

Program Basics

What is the best way to learn more about the program?

You can get additional information by visiting our website at www.upstreamacademy.com/hpf.asp or by contacting Upstream Academy at 406-495-1850 or info@upstreamacademy.com. Additional information on the informational conference call and AGN specific dates are available at www.upstreamacademy.com/hpfcallAGN.asp.

When does the program start and what is the registration deadline?

The registration deadline is May 15. This allows enough time before the first workshop for you to complete the initial assessment and receive the results before the first workshop on July 9-10.

How long is the program?

High Performance Firms delivers four 2-day workshops over the course of two years. The program provides long-term direction for your firm and a cornerstone to drive performance for many years to come.

Who runs this program?

Sam Allred is a Shareholder with Anderson ZurMuehlen & Co. and Founder and Director of Upstream Academy. He interacts with hundreds of CPA firms around the world each year via professional conferences, partner retreats, and conference call presentations. Sam is widely regarded as one of our profession's top strategic thinkers and has been named for the past five years as one of IPA's "Most Recommended Consultants."

Tim Bartz, Chairman and former CEO of Anderson ZurMuehlen & Co., has been a guiding force in the expansion that has tripled the firm's size in the last fifteen years. A respected consultant and energetic speaker, Tim's passion for meaningful change is infused and tempered by the realism born of his many years as Anderson ZurMuehlen's visionary leader.

Dev Warren is an Accenture certified Lean Six Sigma Black Belt (LSS BB) and has extensive experience in financial accounting and analysis, process improvement, capital investment, mergers and acquisitions, and deal negotiation. In numerous executive positions—including chief financial officer, corporate and strategic development director, and controller— he has applied his expertise to develop high performing companies and teams. He now brings those proven concepts to our industry.

How do I register for the program?

You can register for the first workshop online with Visa, MasterCard or check by going to the registration page or by printing the registration form and sending it by mail or fax. We will invoice you for each subsequent workshop and allow you to make adjustments to the number of people attending.

What is the cost of the program and what kind of payment do you accept?

As an AGN firm, three firm members can attend a workshop for $2,500. Additional participants may attend for a workshop for $500 each. We accept Visa, MasterCard and check payments.

Are there any additional costs not built into the program?

The program enrollment fee includes all materials and registration at the workshop. Cost for travel and lodging is not included.

Does it make sense to sign up for this program if we are already participating in other Upstream Academy programs (ELA, ABD, Management Presentations, conferences, etc.)?

The High Performance Firms program takes many of the Upstream Academy programs and brings them together into a comprehensive high level plan for the firm. If you already have participants in our other programs, the concepts and processes learned will integrate well into the program and provide a jumping off point for the program.

Participants

What will be the make-up of the group?

We are offering the program to AGN firms to ensure that firms are all similarly sized and non-competitive. Each workshop will be geared to assist firms of the applicable size (average of 8-12 partners). If you feel your firm does not fit in this group, please contact Upstream Academy for additional options.

How many firms will be in each group?

To keep the group at the ideal size, we will limit enrollment to 15-20 similarly-sized, non-competitive firms. AGN firms will have the right of first refusal until May 15. After this deadline, if we have less than 15 firms registered, Upstream will have the option to invite other non-competing similarly-sized firms to join.

What do you do with the photos we send?

The participant photos are used to create a directory that is sent to all registrants to encourage networking.

What is the time commitment for program participants?

Participants commit to attending each workshop (2 days), participate in two 30 minute calls between workshops and work on firm goals between workshops. Overall, we anticipate at least 100 hours of work each year from each participant.

Should shareholders who will be resistant to change and will not get on board be included?

We don't recommend that these shareholders be part of the core implementation team because this group will need to get to work immediately, but would recommend that you keep any "boat anchors" informed of new initiatives and goals to ensure they feel a part of the process. Buy-in for firm initiatives created at the workshops must be non-negotiable. Since change always produces some discomfort, during the first workshop we will provide strategies and materials for the Implementation Team to use to gain buy-in from reluctant firm members upon their return.

Who should come to the workshops?

We require an Implementation Team of at least three people attend each workshop. Ideally this team would include your managing partner or CEO, your firm's implementation expert (COO, Firm Administrator, etc.) and a partner who represents the firm's future leadership group.   Depending on your firm's partner makeup, you may also decide to bring the majority of your partners.

Do the same people need to come to each workshop?

The Implementation Team needs to attend all four workshops to provide consistency and accountability. You can choose to also send additional people to each workshop; these may be different people for each workshop, but all those who attends need to be up-to-speed with any previous workshop's principles and goals set by the firm.

If we have a small partner group would you recommend all attend?

We have deliberately kept the cost for additional participants to attend low to give you the option to bring multiple partners. If the partner group is small you might wish to bring the entire group to the workshop to ensure everyone is committed and has bought into the program.

Workshops

When are the workshops?

Workshop #1: Vision & Strategy, Financial Metrics, and Partner Alignment
July 9-10, 2012

Workshop #2: Strategic Team Member Alignment
November 5-6, 2012

Dates for Workshop #3: Providing Amazing Client Service and #4: Developing a Culture of Business Development will be determined during the first workshop, based on the schedules of the attendees.

If we sign up, are we committed to all four workshops?

The workshops are designed to build on each other so we highly recommend that you make the commitment to complete all four. We will automatically invoice you for each workshop and you will need to have attended all previous sessions to be eligible to register for a workshop.

What if I enroll in the program, but don't like it or feel that it's not what I anticipated?

As with everything Upstream Academy does, your satisfaction with High Performance Firms is guaranteed. If you are not completely satisfied with the value you receive, we will, at your option, either refund your money or accept that portion of the fees that reflects your level of satisfaction.

Is CPE available for the workshops?

Yes, participants can apply to receive 15 hours of CPE for each workshop.

What is the schedule for the workshops?

Each workshop will run from 8am-6pm on the first day and 8am-3pm on the second day.

If we don't have a firm vision, will the first workshop still be valuable?

Yes, during the first workshop we will share the vision of a high performance firm and help you customize this for your firm so that you can take it back to your firm and help everyone understand and get excited about the process.

Your Firm's Report Card, Goal Setting and Implementation

How is the high performance assessment done and what does the report card include?

Prior to the first workshop, you will receive a questionnaire to complete that will give us a good understanding of your firm's current position in all six areas of discipline. The bench marking information you provide will include financial data, analysis of firm processes, and analysis of your firm's alignment with high performing firm practices and culture. We will analyze the data and provide a report card view of your firm's current position in each area with explanations for each rating and recommendations for improvement. This information will be used during each workshop to customize goals for the firm.

What are the 6 areas will you focus on?

The six areas of discipline are:

1. Leadership and Vision
2. Financial Performance
3. Partner Effectiveness
4. Team Development
5. Client Management
6. Business Development

How much one-on-one help will participants receive in creating their customized plan?

Each workshop will include time to work on customized goals. During this time, the three workshop facilitators will consult with the firm participants to help them create implementation plans for their goals. Facilitators will also follow-up with firms through two 30-minute conference calls between each workshop to ensure the implementation process runs smoothly and you get the highest return on your investment.

Is additional consulting time available if we need more than the two scheduled calls?

If you would like additional consulting time, we can arrange additional conference calls or an on-site visit at a pre-negotiated rate.

What take-aways are available to help us implement goals after each workshop?

We will provide templates and sample documents, so the Implementation team does not need to recreate the wheel when they return.