



MANAGEMENT PRESENTATION ORDER FORM

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MANAGEMENT PRESENTATION MATERIALS

With each Management Presentation, the firm receives access to downloadable materials including the PowerPoint with embedded audio recorded during the live presentation, and an mp3 of the presentation audio. If ordered [online](#), these downloadable materials are immediately available. If ordered via paper form, an Upstream representative will contact you via email with download instructions within one business day of receipt.

PRESENTATIONS

- Artificial Harmony: The Elephant Is Still in the Room
- Avoiding the Communication Tax: The High Cost of Poor Communication
- Avoiding the Managing Partner Traps and Pitfalls
- Becoming an Indispensable Part of Your Clients' Success
- Becoming the Employer of Choice in Your Market
- Best Practices for Building Rapport with Clients and Prospects
- Building a Culture of Discipline in Your Firm
- Building a Strong Firm through Partner Unity
- Building Firm Loyalty: The Vital Keys
- Building Firm Loyalty from Day One: Creating a Great Orientation Program
- Building Trust: Things Great Managing Partners Do
- Changing Your Business Development Culture from Selling to Helping
- Choosing to Remain Independent: What Will It Take to Stay the Course?
- Conducting an Effective Partner Retreat
- Conducting Meaningful 360° Evaluations
- Creating a Culture of Accountability in Your Firm
- Creating a Culture for Successful Client Transitions
- Creating a Firm of Excellence
- Creating a Firm-Wide Culture of Continuous Learning
- Creating and Communicating a Shared, Compelling Firm Vision
- Creating and Implementing a Client Acceptance Policy
- Creating and Sustaining a Culture of Self-Accountability
- Dealing Effectively with Your Firm's Underperformers
- Dealing Effectively with High Maintenance Partners
- Developing a Client Service Plan for Your Best Client
- Developing Partners Who Are Better Business Advisors
- Developing Your Bench Strength: Effective Tools, Proven Strategies
- Developing a Successful Women's Initiative
- Driving Change: Finding and Inspiring Your Firm's Change Agents
- Driving Organic Growth by Creating Great Partner BD Goals
- Establishing a "Better Every Year" Mindset Firm-Wide
- Eventually You'll Run Out of Ledge: Proactive Ways to Reduce Your Team's Stress
- Everybody Wins: Getting Partners to Pass Work to the Right Level
- Examples of Great Partner Goals
- Exceptional Client Service: Getting the Entire Firm on the Same Page
- Finding the Delicate Balance: Work and Life
- Fired Up, Not Burnt Out: Increasing Employee Engagement
- Firing Your D-Level Clients
- Firm Growth: Getting Your Partners Committed (and Excited!)
- Firm Success and Partner Goals: Making the Connection
- Getting Out of Crisis Mode: Time Management Strategies That Work
- Getting Past Parity: Treating Your Best as the Best
- Getting Serious About Niches
- Giving Great Presentations: Hints, Tips and Strategy
- Giving Your Best Clients the Best Service
- Great Topics for Partner Retreats and Meetings
- Hardworking, Loyal But Not A Star: Retaining Those Who Will Never Make Partner
- Helping Those You Lead Envision a Great, Long-Term Career at the Firm
- Hiring Your Firm's Future: What to Look for Today
- How Am I Doing? Evaluating Your Impact as Managing Partner
- How Do You Measure Up? Becoming a High Performing Firm
- How Many Partners Will You Need in Five Years?
- How to Create an Annuity in a Consulting Practice
- How to Prepare Your Partners for Successful Retirement
- How to Stay Refreshed and Maintain Balance as a Leader
- If You Build It, They Will Come (and Stay)
- Improving Communication within Your Firm
- Income Partners versus Equity Partners
- Insights from the Last 100 Partner Retreat Facilitations
- Is the Book of Business Culture Hurting Your Firm?
- Jim Collins' Rules for Your Bus: Getting Past the Talk
- Joining Isn't the Same As Staying: Making Re-Recruiting a Priority
- Keeping Poor Performers: A Game Nobody Wins

- Key Lessons Learned in Identifying, Developing and Retaining Top Performers
- Key Principles and Best Practices for Partner Compensation
- Key Principles of Effective Coaching
- Making a Difference: What Every Coach Needs to Know
- Making Partner Meetings the Best Meetings You Attend
- Making the Most of Every Team Member's Strengths and Talents
- Making Your Firm Governance Model Work For You, Not Against You
- Managing Partner Transition: Four Vital Keys for Success
- Managing Your Nonbillable Time to Produce Concrete Results
- Mergers and Acquisitions: Things You'd Better Know and Understand
- Moving Away From the Book of Business Culture
- Moving from Historian to Trusted Advisor
- New Partner Training: What the Best Firms are Doing
- Ownership: The Privileges and Responsibilities of Being a Shareholder
- Playing to Partner Strengths: Examples That Make Sense
- Partner Compensation: A Catalyst for Firm-Wide Change
- Partner Evaluations: If Nothing Ever Changes What's the Point?
- Partners: Beware of CAG!
- Principles of Personal Development: Making the Most of Your Career
- Proactive Steps to Ensure Partners Retire Successfully
- Profitable Growth: What High Performance Firms Are Doing
- Rating Your Clients A to D: Why and How
- Re-inventing Your Client Services
- Removing the Mystery from Your Path to Partner Program
- Sharpening Your Focus: The Top Five Issues for 2008
- Stop Conducting Perfunctory Performance Reviews
- Stop Indulging the Soloists: Specific Ways to Create a One-Firm Culture
- Strategic Marketing: A Process That Makes a Difference
- Strategies for Improving Client Payments
- Strategies for Turning Busy Season into Opportunity Season
- Succession Planning: The Vital Keys to Success
- Successfully Merging Different Cultures
- Ten Keys to Creating Raving Fans
- Ten Proven Ideas for Building Firm Culture
- The Best 7 Things to Do to Reduce Underperformance
- The Best Approach to Firm Strategic Planning
- The Best Strategy for Maximizing Key Leadership Positions
- The Best Way to Develop Future Rainmakers
- The Biggest Barriers in Launching and Growing Niches
- The Case for Part-Time Partners
- The Five Highest Uses of Your Time as Managing Partner
- The Partner Sabbatical: A True Win/Win/Win
- The Proper Way to Evaluate Firm Culture
- The Ten Worst Habits of Otherwise Good Leaders
- The Top Messages Your Partners Must Hear
- Training for the Future: The Best Way to Rapidly Develop Your People
- Transition Planning for Retiring Partners
- Transitioning Clients at Partner Retirement: Getting It Right
- What Are the Biggest Paradigms Holding Firms Back?
- What Every Firm Needs to Know About Proactively Preparing for Busy Season
- What It Means to Be a High Performing Partner
- What Should You Be Doing with Your B and C Clients
- What to Do When Partners Can't Seem to Get Along
- What to Do When Payroll Rates Rise Faster Than Billing Rates
- What's the Best Use of Partner Time?
- Why Firms Are Re-thinking Their Recruiting Strategy
- World Class Training: Getting Your Firm on Track
- Written Standards: Getting Beyond the Talk in Improving Performance

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