



**An Advanced Leadership Workshop  
for Those Serving in Significant Roles**

# The true measure of your leadership is whether you effect positive change.

Effective leadership is always about creating positive results. To be successful, firms must have leaders who anticipate needed change, determine what barriers stand in the way of desired change, and then develop and execute a plan to achieve positive results. This often involves moving people past the status quo, getting spirited commitment to change, and developing a firm culture that supports honest dialogue and values mistakes. Are you a catalyst for positive change in your firm?

*Leading Positive Change* is an **advanced leadership workshop** focused on helping those in key firm positions become the effective leaders they want to be and the firm really needs. **We'll help you achieve better results by teaching you how to lead positive change in your firm.**



**Who should attend?** Ideally you would select individuals who will play a key role in leading your firm through the many changes facing our profession. These individuals will become a key part of your ***change management team***.

**What can you expect?** Thought leaders for our profession, Sam Allred and Gordon Krater, will use a combination of presentation, real-world scenarios, case studies and peer-to-peer sharing to teach you how to create positive change in your firm.

Among other things, your change management team will learn:

- Why most change efforts fail
- How to create a culture for change within the firm
- How to effectively management expectations
- How to develop and enable change agents
- How to recognize and effectively deal with passive resisters to change
- The proper pace of change within your firm
- The communication needed for effective change
- A process for change that they can bring back to your firm
- The importance of celebrating change

Most change initiative failures  
are not process failures.  
They're people failures.

# Key Elements of the *Leading Positive Change* Workshop

**D**uring this workshop, we'll explore how to create a culture of positive change in your firm.

## 1 Holistic Approach to Change

Change is not achieved overnight. Effective, long-term change requires leaders who can analyze, plan and implement changes with a "leave nothing to chance" approach.



We'll show you a process that takes the guesswork out of Change Management and then provide examples of how to effectively use that process to solve real-firm issues. We'll discuss issues with teams, partners, clients, financial management and business development.

During the 2.5 day workshop, we'll leave time to share solutions, ask questions and collaborate with colleagues on multiple teams.

**Upstream Performance Institute**  
*Leading Positive Change*

Agenda

**Day One**

- Welcome and Introductions
- 10 Key Principles of Effective Change
- Why Most Change Efforts Fail
- Creating a Culture for Change
- Measuring Change
- The Change Process
- Problem Solving Round 1

**Day Two**

- Questions from Day 1
- The Danger of Passive Resisters
- Selecting What to Change
- Developing and Enabling Change Agents
- The Communication Needed for Effective Change
- Problem Solving Round 2

**Day Three**

- Questions from Day 2
- Gentle Pressure Relentlessly Applied
- The Importance of Celebrating Change
- The Top Changes Firms Need to Make to Thrive in the Future
- A Few Last Thoughts
- Golden Nuggets

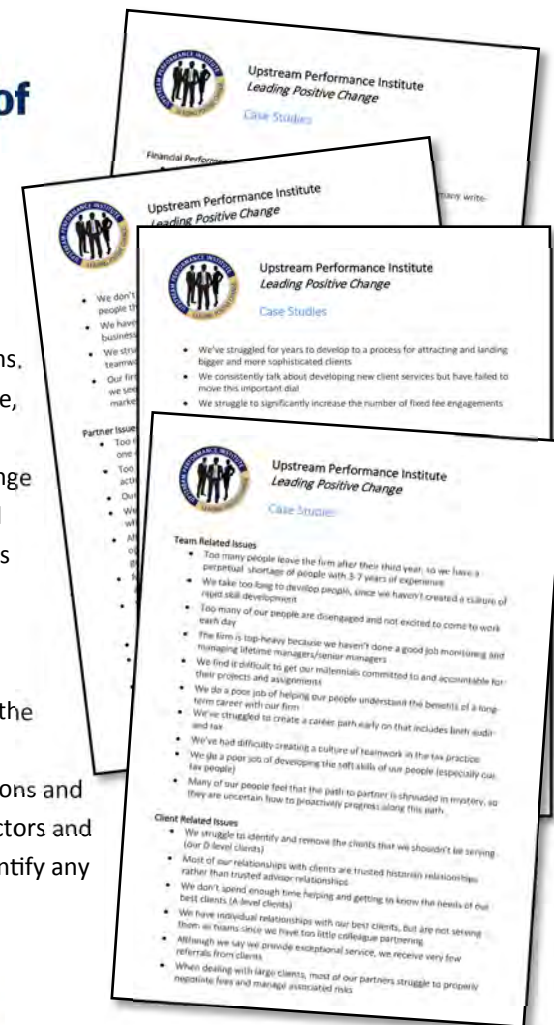
## 2 Case Studies of Real-Firm Issues

Your firm is unique but that doesn't mean you can't learn from the successes (and failures) of similar firms. Drawing on their extensive experience, Sam and Gordon will lead teams through scenarios designed to challenge thinking and provide a testing ground for solutions to real-world issues firms face today and tomorrow.

Team will select case studies and develop solutions to the issues using the Process of Change. They will then be responsible for reporting on solutions and will receive feedback from the instructors and the group to help clarify thinking, identify any potential issues and refine solutions.

## 3 Peer-to-Peer Collaboration

Networking with peers in a stimulating group environment is an important experience for all professionals, and especially for firm leaders. Participants will work with multiple teams to collaborate on solutions to firm issues and share insights from their own experiences.



### Need more information?

Join the free information webinar on June 29 at 10am Mountain (12noon Eastern).

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

# Key Elements of the *Leading Positive Change* Workshop

## 4 Key Principles of Effective Change

To help make the information concise and memorable, we'll discuss 10 Key Principles for change—both what you should and what you should not do.



## 5 Experienced Instructors

Thought leaders for our profession, Sam Allred and Gordon Krater, have years of experience guiding firms and partners through difficult changes.

**Sam Allred** interacts with hundreds of firms each year via conferences, consulting engagements, retreats, and webinars. Sam has been regularly recognized as one of the major influencers in the profession and is listed as one of *Accounting Today's* Top 100 Most Influential People in Accounting and as one of IPA's Most Recommended Consultants.



**Gordon Krater**, Managing Partner of Plante Moran, has more than 30 years of real-firm experience. Gordon writes and speaks on industry topics, encouraging others in "true stewardship." He has guided his firm's client service, growth, people development, risk management, and strategic direction since he became managing partner in 2009.



## 6 Follow-Up

Once you've had a chance to use the Process of Change within your firm, we'll hold a follow-up webinar to discuss successes and challenges, answer questions, share solutions and ensure that you are making progress toward effective changes within your firm.

## 7 Unconditional Guarantee

We're confident that *Leading Positive Change* will be of immeasurable value to you. Like everything we do at Upstream Academy, this workshop 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

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).

**This workshop will be held December 12-14 in Chicago.**

**The workshop is \$3,500 per participant (\$3,250 for additional participants from the same firm).**



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