



Reflect, Recognize, & Recharge.

A Year-End Leadership
Checklist for Accounting Firms

WHAT DID YOU ACHIEVE IN 2024?



- Highlight firm milestones: new service lines, improved client advisory practices, or healthier growth.
- Reflect on leadership development progress: mentorship programs, training initiatives, or team accomplishments.

TURN CHALLENGES INTO OPPORTUNITIES



- Labor shortages: How did you adapt?
- Evolving client expectations: Did you align services to meet their needs?
- Proactive vs. reactive business development: What worked, and what didn't?

EXPRESS GRATITUDE



- Celebrate team contributions.
- Highlight individuals who stepped up as leaders or innovators.
- Reinforce the culture of appreciation.

SET THE TONE FOR THE NEW YEAR



- Build a Stronger Firm: Separate governance from operations for clarity and efficiency.
- Invest in Talent: Provide leadership training, mentorship, and real-time feedback.
- Focus on Quality Growth: Align client and project selection with your firm's strengths.

START 2025 WITH PURPOSE



- What's one intentional decision your firm can make today to kickstart the year?
- Explore Upstream Academy's resources for leadership development and strategic growth.

*"2024 was about learning, growing, and celebrating.
Let 2025 be the year of intentional leadership and meaningful progress."*



About Upstream Academy

Built on real-world experience and thought leadership, Upstream Academy equips accounting firms with innovative solutions for higher performance. We position firms and professionals to navigate the challenges of the future successfully.

UpstreamAcademy.com