

Developing Reputation,
Visibility & Business SM

LEADERS *of the* FUTURE PROGRAM

[2016-18]

BUSINESS ADVANTAGE PROGRAM

IN ASSOCIATION WITH
**WHITMAN
BUSINESS
ADVISORS**

ALLIOTT
GROUP

A Worldwide Alliance of Independent
Accounting, Law and Consulting Firms

Program - At a Glance

Target audience: Future team leaders, managers or partners

Duration: 18 months

Starting: 15-17 November 2016

Ending: June 2018

Facilitator: Whitman Business Advisors LLC

Format: Combination of classroom learning, webinars, peer to peer roundtables & partner mentoring

Location: Las Vegas (*fly-in days/classroom sessions*)

Cost: US\$2,000 on sign-up, followed by instalments of \$2,000 and \$1,500 (*see page 7 for more information*)



With the war for talent still one of the defining issues that is holding back many independent professional service firms, Allriott Group, in association with Whitman Business Advisors LLC, has developed an 18 month program to support and develop the talent of your firm whether that be future team leaders, managers or partners.

It is estimated that replacing an employee can cost between 40-150% of their yearly salary (without recruiting fees!), so identifying and then looking after your talent pool is key to your firm's future success. Numerous studies show that every dollar spent on training produces ROI of over 30 to 1 over a three year period.

This program is designed to not only develop your talent of tomorrow but will also play a part in retention of key team members. Sending staff on this program will show your high performers that you are willing to invest in them. By engaging and developing your staff you will hopefully be able to increase revenues and profitability, and as the firm grows, be in a position to develop internal succession solutions.

Structure of Program

The program runs over an 18 month period and began with a kick-off session in Las Vegas in November 2016. Participants can join this modular program at any juncture, but it is advisable to join one of the fly-in face to face classroom sessions in Las Vegas. It offers a combination of classroom learning, webinars, peer to peer roundtables as well as partner mentoring.

The classroom learning takes place at three fly-ins in Las Vegas in total, one of which took place in Las Vegas, with the following two dates remaining:

- June 19-21, 2017
- June 2018 (*dates to be confirmed*)

These sessions will be held in conjunction with Allriott Group's North America Managing Partners Conference and will give participants the opportunity to spend time with managing partners to learn first-hand from their professional experience and receive guidance on their future careers.





Overview of Program

Fly-in Day 1: Las Vegas, June 20, 2017

Module: Business Development Expertise

Business development is the long term lifeline for the firm. Too frequently, people believe they are not good at it and are unwilling to contribute. Although not everyone will become a rainmaker, everyone can contribute to business development success. In this module participants will learn:

- Social media strategies
- Micro niche development
- Easy BD follow up
- The 10/5/1 strategy
- Everyone has a role
- Being an expert
- Your most important communication tool – Listening.

Fly-in Day 2: Las Vegas, June 21, 2017

Module: Self and Team accountability

Accountability is one of the four pillars of a world- class firm and perhaps one of the most important factors in achieving firm goals. Too often, accountability becomes a “dirty” word in professional service firms. However once clearly defined and adopted as part of the firm’s culture, the firm will shift from excuses and complaining to results and pride. Firms with high accountability typically are “Best of the Best” firms. In this module participants will learn:

- What is accountability
- Why is accountability one of the most critical factors of firm success
- The leader’s role in accountability
- Impact or consequences of having or not having accountability
- Strategies for increasing accountability among your people.

July 2017 – May 2018

Module: Building and Leading Teams

The ability to build and lead teams is an essential skillset for current and future leaders. The strength of the “Team” has a significant impact on many factors. As related to client service delivery, the team will have a tremendous impact on utilization, realization, profitability and both client and staff retention. As to the firm’s leadership and committees, the impact of building the right teams links directly to the viability of the firm into the future. In this module participants will learn:

- How to build a team
- How to lead without a title
- Delegation vs abdication
- Developing trust
- Communication
- How to deal with problem team members
- Coaching team members.

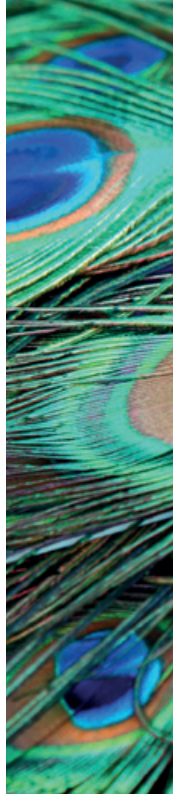
Module: Technical Expertise

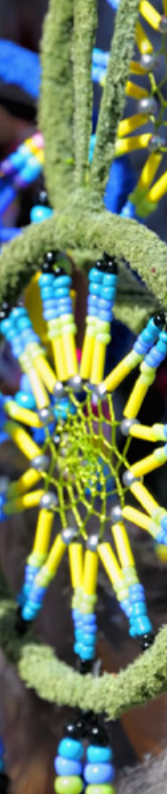
Your clients’ minimum level of expectations is that you really know your stuff. Developing expertise is critical, and continual learning with a life-long pursuit of excellence is the goal. By focusing on continual improvement, you will become the expert and get better every day so that rather than always being the seeker, you will be sought out by clients, prospects and internal team members. As a technical expert, you will be able to assist in business development and internal staff development by presenting seminars and thought leadership to the masses. In this module participants will:

- Understand the impact internally
- Understand the impact on business development
- Learn how to bring greater client value
- Learn how to build technical expertise
- Be given strategies that will make the commitment to life-time learning easy.

Module: Dealing with Conflict

The conversations that we need to have but don’t, contribute tremendously to the stress and conflict in all aspects of our lives.





The failure to make decisions and the sugar-coating approach that firms take to dealing with conflict, affects trust tremendously. Avoiding conflict generates greater conflict and bigger problems that become systemic in firms. In this module participants will learn:

- How to have fierce conversations
- How to be part of the solution
- How to be a one minute manager
- How to deal with internal and external conflict
- When to apply the rule of 72
- How to listen when emotional
- How to adopt a coaching culture
- The difference between healthy and toxic conflict.

Fly-in Day 1: June 2018

Module: The Client Experience

You've attended networking meetings, developed expertise in a niche, presented thought leadership or written articles, and now you have the golden opportunity. In this module, we will teach you how to implement a process that will make you unique among your peers and how to turn that prospect into a client for life.

Module: State of the Profession

In this module, we will examine the critical issues that our profession faces. We will look at the changes in the profession and workforce and what you need to do to be a leader, not only for today, but moving into the future.

Fly-in Day 2: June 2018

Recap & Graduation

During this roundtable forum discussion, we will share successes and failures experienced along the way. What has worked and what has not. Participants will work with one another to prepare for a presentation to the partner group on their return to their firms, as well as what they should be doing to help others in the firm to become leaders.

Program Cost

The total cost of the program is US\$5,500 which includes:

- All classroom sessions, webinars and associated materials
- Hotel accommodation for both classroom sessions
- All meals during the classroom sessions.

The only additional costs are the flight tickets to Las Vegas and associated travel costs.

Payment can be made in full to Alliot Group on signing up for the program or in three instalment payments as follows:

- \$US2,000 on signing up to the program
- US\$2,000 on 1 September 2017
- US\$1,500 on 1 January 2018.







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