MOORE STEPHENS NORTH AMERICA

DYNAMIC GROWTH ACADEMY

Developing Leadership and Growth for the Future

Part of the MSNA Leadership Growth Programs
Dynamic Growth Academy

A program for senior managers and new partners.

Designed to help participants build leadership and business development skills.

An opportunity to build relationships among future leaders of MSNA firms.

Four, 2 Day On-Site Training Sessions

- Integrated curriculum and applied learning experiences that support participants to excel as leaders and in growing the business.
- Leadership Development: strengthen executive presence, shift from self-reliance to team reliance, coach and develop talent, step up to conversations that matter, and create the future by inspiring and engaging others.
- Business Development: learn the sales process, understand how to retain and grow current clients, and how to turn contacts into new business.
- Work with a set of business development tools to help keep you on track for success (will discuss individual progress and goal achievement during the final workshop)

*Final Session for BD will be a one-hour in person one on one with the coach rather than a group training

2 Day Workshop

Six, 1-hour Individual Telephone Coaching Sessions over the course of the program – three with a Leadership Coach and three with a Business Development Coach.

- Discussion will be focused on maintaining accountability around leadership development, current pursuits and clients, addressing any roadblocks, and targeting and expanding key relationships through specific strategies with associated timelines and tools.
- Each participant will administer a 360-degree survey to gather feedback about their leadership from above, across and below them in their firm. Leadership coaching sessions early in the program will leverage this data to help the participant clarify their leadership development goals.
- Business development will focus on current pursuits and clients, addressing roadblocks, and targeting and expanding key relationships through specific strategies with associated timelines and tools.
- A more experienced partner from within the firm will serve as program mentor for each participant. The program mentor will be involved in one or two coaching calls, with the participant, during the program.

1:1 Participant Coaching

Peer Group Telephone Coaching Sessions

Peer groups:

- Will be comprised of 6 – 7 leaders who stay together for support and accountability throughout the program.
- Work together in live sessions and gather twice quarterly for peer group video conference calls – one call is focused on their leadership work and one focused on their business development. Both are facilitated by a member of the peer group.

Save the Dates:

Orientation Webinar, October 4, 2018, 1:00-2:00 PM CDT

Session I, November 13-14, 2018       Session II, May 21-22, 2019
Session III, November 13-14, 2019    Session IV, May 6-7, 2020
Workshop I
SHOW UP AT OUR BEST
IN OUR MARKET INSIDE OUR FIRMS

Create an Engaged Leadership Presence
- Know your impact
- Get a balcony view – see the bigpicture
- Customize your communications to your audience
- Learn to be present- for the moment, for others, for the task at hand
- Relax under pressure- reduce distractions, increase focus
- Minimize impatience and anxiety
- Commit to regular practices of energy management and renewal

Workshop II
LINKING THE CLIENT AND TALENT EXPERIENCE

Enhancing Talent Experience
- Shift from self-reliance to team-reliance
- Learn to give others more control so they thrive
- Flag and reduce behaviors that “accidentally diminish” the potential of those you lead
- Create a coaching habit- Ask more and sayless
- Set good boundaries for yourself and for your team
- Instill ownership and accountability
- Ditch the drama- Drop blaming/complaining/comparing

Workshop III
COLLABORATION

Are You a Collaborative Leader?
- Be a silo buster- Demonstrate full enterprise leadership
- Learn how to build common ground and foster mutual learning
- Step up to the conversations that matter with backbone and heart
- Accept and actively manage conflict
- Increase skill in perspective-taking and empathy
- Find the right balance between collaboration and competition

Workshop IV
AGILITY AND INNOVATION

Positive Intelligence and Power
- Shift from problems to possibility
- Learn how happiness gives us a competitive edge on success
- Train your brain to be more positive
- Understand and reduce internal saboteurs to positive intelligence and genuine confidence
- Empower others by helping them learn to leverage different bases of power
- Get outside your comfort zone and encourage your team to do the same
- Work your own and your firm’s edge: Let go of the status quo to create value in new ways

Develop a Plan for Business Development Success
- Stages of the business development cycle
- Understand the 6 principles of successful business generation
- Discover your personal brand and create your verbal business card
- Complete your Individual business development plan
- Understand and Craft a “value proposition” to approach clients and prospects
- Personality characteristics for selling

Align the Firm and Client Goals
- Increase your opportunity assessment skills
- Learn effective needs assessment
- Understand the three types of questions and matching firm skills to client needs
- Transition from assessment to presenting your solution
- Effective client meetings
- “Shared Insight” - a client meeting framework
- Setting the agenda and managing the flow and other colleagues
- Follow up on next steps – do’s and don’ts

Build Relationships as a Team
- Presentation skills – 10 tips for successfully communicating to your internal and external audiences
- Working as a team to ask for and close business
- Asking for the business – tips and techniques
- Overcoming objections in the sales process
- Conducting client service interviews
- Key client growth and retention
- Complete the client action plan

Adapt and Innovate around Client and Industry Needs
- Review individual action plan
- Discuss volume of BD activity
- Measure progress towards original objectives
- Achievement of measurable goals?
- If not achieved, discuss barriers to success
- Determine future accountability to new habits and systems
- Review your client service differentiators
- Monitor progress on personal brand
- Review future aspirations
# Dynamic Growth Academy Participant Journey Matrix

**Description**

<table>
<thead>
<tr>
<th>OCTOBER 18</th>
<th>NOVEMBER 18</th>
<th>DECEMBER 18</th>
<th>JANUARY 19</th>
<th>FEBRUARY 19</th>
<th>MARCH 19</th>
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<td><strong>Registration questionnaire completed by Program Mentor, Managing Partner, and Participant</strong></td>
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**Matrix Key**

- **Workshop Sessions**
- **Business Development Activities & Connections**
- **Leadership Development Activities & Connections**

**Complete by September 28, 2018**
## WHAT ARE THE STEPS TO CONFIRM REGISTRATION?

<table>
<thead>
<tr>
<th>STEP NUMBER AND DESCRIPTION</th>
<th>DATE</th>
<th>COMMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Confirm the number of candidates that you seek in the cohort (and communicate to MSNA)</td>
<td>ASAP</td>
<td>In the current cohort, a minimum of 14 spots are needed to be filled. There is an option to add an additional 7 (in total) to add one additional peer group. If the minimum number is exceeded, participants will be placed on a waiting list until the additional peer group of 7 is filled.</td>
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<tr>
<td>2 Identify an internal Program Mentor for each candidate</td>
<td>Prior to submitting enrollment form</td>
<td>See Q&amp;A below</td>
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<tr>
<td>3 Submit completed enrollment form with completed questionnaire</td>
<td>September 14</td>
<td>Registration closes the earlier of the date to the left or when the 14- or 21-person capacity is met.</td>
</tr>
<tr>
<td>4 Submit deposit</td>
<td>September 14</td>
<td>To secure spot, 30% non-refundable deposit is required.</td>
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</tbody>
</table>
| 5 Internal meeting to overview questionnaire | September 28 | This meeting should include the Managing Partner and Program Mentor. The objective of the meeting is to:  
- Share desire to invest in their development;  
- Describe the program;  
- Share investment required;  
- Discuss questions on the Enrollment Form to:  
  - Assess candidate’s interest and motivation in participation;  
  - Identify specific areas of growth;  
  - Affirm mutual commitment to a successful experience.  
NOTE: Please record all responses to questions on the Enrollment form in writing and submit to the MSNA Executive Office, if haven’t done so already, so they can share with the Program Facilitators. |
| 6 Attend orientation webinar | October 4 1p-2p CT | Attendance required for Participant and Mentor and preferable for the Managing Partner. Through GoToMeeting |

## WHAT IS THE EXPERIENCE LEVEL REQUIRED FOR THE PARTICIPANTS?

Candidates should have the following characteristics for consideration in the program:

1. Have 8-12 years of experience in the profession;
2. Have a role in the firm equivalent to Senior Manager, Director, or other similar title;
3. Have recently earned the role as Income Partner pursuing Equity Partner or Partner (for firms without Income position) OR has the potential to become Partner within two years;
WHAT ARE THE RESPONSIBILITIES OF THE MENTOR?

PROGRAM MENTOR:

Each participant is assigned a mentor by the Managing Partner of the firm. The purpose of this role is two-fold. First, the individual provides mentoring to the program participant. This includes active participation in discussions related to learning and applying concepts, establishing development goals, and serving as a sounding board around challenges. Second, the mentor should take on an internal advocacy role with fellow partners and professionals, especially when the program participant is seeking to make change or try different approaches.

When considering Program Mentor candidates, firms are encouraged to consider the following:

1. Tenure – Does the person have six to ten years of experience as a partner?
2. Passion – Does the person want to do this or is s/he being asked to add one more item to their busy calendars?
3. Learner – Does the person see this as an opportunity to continue their own learning and skill building?
4. Commitment – Does the person agree that achievement of partner, for those who are not yet partner, or of goals is part of their responsibility?
5. Depth and breadth as mentor – Does the person have the right depth and breadth of what is going on within the firm to identify on-the-job opportunities to apply some of the key learnings of the program?
6. Investment – Does the person agree that this is an investment, therefore is willing to make appropriate sacrifices to support the participant’s positive experience?

WHAT ARE THE DATES OF THE FOUR WORKSHOPS?

<table>
<thead>
<tr>
<th>WORKSHOP</th>
<th>DATE</th>
<th>LEADERSHIP</th>
<th>BUS DEVELOPMENT</th>
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</thead>
<tbody>
<tr>
<td>1</td>
<td>Nov 13-14, 2018 St. Louis, MO</td>
<td>Create an Engaged Leadership Presence</td>
<td>Develop a Plan for Business Development Success</td>
</tr>
<tr>
<td>2</td>
<td>May 21-22, 2019 Minneapolis, MN*</td>
<td>Enhancing Talent Experience</td>
<td>Align the Firm and Client Goals</td>
</tr>
<tr>
<td>3</td>
<td>Nov 13-14, 2019 Location TBD*</td>
<td>Are You a Collaborative Leader?</td>
<td>Build Relationships as a Team</td>
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<tr>
<td>4</td>
<td>May 6-7, 2020 Chicago, IL</td>
<td>Positive Intelligence and Power</td>
<td>Adapt and Innovate Around Client and Industry Needs</td>
</tr>
</tbody>
</table>

*Locations are not yet finalized

WHAT IS THE PROGRAM ORIENTATION?

Prior to the first session, a Program Orientation will be scheduled for the Managing Partner, Program Mentor, and Program Participant. Although it will be recorded for subsequent review, it is important that everyone participates or listens to this together. This session will be 60-minutes and will be held approximately 6-8 weeks in advance of the program. Its purpose is to provide all participants and supporting firm leadership with a common understanding of what to expect as well as ask any questions.
WHAT IS THE PRICE & WHAT ARE THE PAYMENT TERMS?

The investment is $11,000 USD per participant.

Tuition for the program is payable in three installments. These payment terms are offered as an accommodation to member firms to stagger the investment over the program term; however, the curriculum is a bundled offering. Sessions cannot be purchased individually.

Once a participant is committed to participate in the program, the member firm is obligated to pay the entire fee over this term, regardless of participant participation. Therefore, it is important to communicate to the participant that this is a commitment over the 18-months. Any separations from service will be the responsibility of the member firm.

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<tr>
<th>PAYMENT DATE</th>
<th>PERCENTAGE</th>
<th>COMMENTS</th>
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<tbody>
<tr>
<td>September 14, 2018</td>
<td>30%</td>
<td>Non-refundable deposit payable upon invoice received from MSNA.</td>
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<td>March 31, 2019</td>
<td>40%</td>
<td>Installment #2 payable upon invoice received from MSNA.</td>
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<tr>
<td>September 30, 2019</td>
<td>30%</td>
<td>Installment #3 payable upon invoice received from MSNA.</td>
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WILL THERE BE SOME WAY FOR PARTICIPANTS TO MAINTAIN CONNECTION DURING THE PROGRAM AND BEYOND?

Yes, we intend to create a closed LinkedIn Group that is comprised of participants solely from each cohort.
MSNA PROGRAM LIAISON:
Audrianna Schenck
aschenck@msnainc.org

PROGRAM PARTNERS:
The Center for Character-Based Leadership
    Kateri Topitzhofer
    www.characterwork.com
LVG Advisors
    James Cranston
    Silvia Coulter
    www.lawvisiongroup.com

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