ELA Guides

Principles That Make a Difference

A guide must consider the success of others to be of mutual benefit.

A guide must care enough to give constructive feedback.

A guide recognizes that people grow only when they stretch themselves.

Overview

As an Emerging Leaders Academy guide, you mentor and work closely with participants over the entire course of the ELA program. During this time, you hold individuals accountable for their progress, help them set and achieve challenging goals, and complete important assignments. Part of our job at Upstream Academy is to ensure your role as a guide is not burdensome by providing the necessary tools, advice, and support. As a guide, you have access (along with participants) to an Internet-based tool that allows you to track progress on goals and projects throughout the year.

Guide Duties

As an Emerging Leaders Academy guide, you are responsible for the following:

- meeting with your participant monthly to answer questions, provide support and encouragement, and ensure accountability
- helping your participant set and achieve meaningful monthly goals
- assisting your participant in identifying and successfully completing a challenging leadership project
- ensuring your participant prepares for, participates in, and completes follow-up goals for each Leadership Training Forum

Guide Webinars

We are committed to doing everything possible to help you be an effective guide, and we encourage you to contact us with questions, observations, ideas for improving the program, etc. Three times a year, Jeremy Clopton hosts one-hour webinars specifically for ELA guides. These webinars provide valuable information about the program, offer tips for guiding your participant, and offer opportunities to address any questions that may arise. Upstream records each guide webinar and the recorded webinars are available within a few weeks online on our partner LMS, LCvista.

Leadership Training Forums

Monthly webinars led by Jeremy Clopton and Upstream Faculty serve as forums for discussing key leadership principles. When all ELA participants from your firm attend a forum together, wonderful opportunities for interaction and discussion are created. Participants receive the slide deck, Questions to Consider, and other materials in advance of each presentation, and they can access the forum recording about a week after the webinar. As a guide, you are responsible for verifying that your participant prepared for and listened to the forum. It is also your responsibility to ensure your participant completes the follow-up questions, which ask them to identify what they gained from each forum and how they will implement what they learned. You should also help participants choose monthly goals that align with firm goals. Many firms find it very effective to have guides and participants listen together and leave time for discussion afterward.

Goals

To be an effective leader, we believe an individual must be highly proficient in at least three of the following skill areas and be competent in the other areas: business development, client management, personal development, team development, and leadership development. Each year, Upstream provides participants with goal suggestions following each Leadership Training Forum. Participants are expected to select stretch goals that will benefit them and ideally the firm. As a guide, you are responsible for helping your participant choose appropriate goals and customize them to meet individual and firm needs. In addition, you are expected to teach correct principles and methods of planning and calendaring tasks, meeting deadlines, and being self-accountable.

Leadership Project

Each year, participants complete a challenging leadership project that develops important skills. We strongly encourage joint projects if your firm has more than one ELA participant. As a guide, you help your participant choose a project and then hold him/her accountable for progress on that project throughout the year to ensure completion by May 31. A good project stretches the participant's abilities, is specific, connects to the firm, is measurable, and has a timeframe. Projects should take participants 10+ hours to complete.

Hints and Tips for Success

1. **Get buy-in from the beginning.** Emphasize that the skills gained through participation in ELA are life-long, not just something to enhance proficiency in a current position.

2. **Meet monthly with the participant in face-to-face meetings.** Meetings can be informal (e.g., over lunch), at a regularly scheduled time, in conjunction with Leadership Training Forums, or at a special event for the firm's ELA guides and participants. Calendar these meetings well in advance, and don't forget that workflow issues (such as tax season) may require some adaptation.

3. **Have high expectations.** People only grow when they stretch themselves. Guides should ensure that goals and leadership projects are sufficiently challenging to benefit both the participant and the firm, but not so challenging as to become onerous burdens.

4. **Develop a personal relationship.** The personal connection makes the two-year commitment more enjoyable and provides the emerging leader with another valuable connection.

5. **Communicate at the correct time.** Often this means calendaring reminders to yourself so you can give feedback, offer direction, or give a reminder at a time when it's most beneficial for the participant rather than when you happen to think of it.

6. **Let the participant do the driving.** Although you have more experience, part of the purpose of ELA is to help participants develop greater initiative and follow-through. Get the participant excited about the program, then allow them to direct the work.