

# Leadership

## Charting Your Path to Greatness

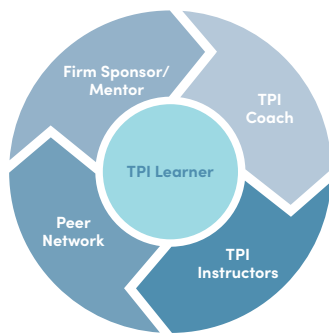
View a library of testimonials from recent TPI graduates.

[thepartnerinstitute.com/testimonials](http://thepartnerinstitute.com/testimonials)

When you talk with any of the top consultants or leading practitioners in the profession, they confirm that developing an effective successor generation is the number one issue facing accounting firms today.

Why? The IPA Practice Management Survey shows that 71% of firms have an average equity partner age above 50, and 76% of firms have no formal succession plan. These staggering statistics have many firms scrambling to find the next generation leaders in their firms—leaders who will excel in the areas of practice development, performance management and strategic thinking.

Sophisticated firms realize that leadership development isn't something they can simply delegate to "one of the partners" (someone who may have little-to-no formal training or education on how to develop leaders or serve as an effective mentor and coach)—it's a deliberate process, precisely crafted with an intentional focus.



### TPI Leadership Development Model

As our development model illustrates, each TPI participant is immersed in a cohesive development regimen that balances feedback and interaction among their instructors, coach, firm sponsor and classmate peers.

### The Solution

Sending your future leaders to limited "quick-fix" programs or conferences isn't a long term prescription for success. In his Harvard Business Review blog, Ron Ashkenas, managing partner of Robert H. Schaffer & Associates, demonstrates that translating leadership training into results requires a special blend of training, mentoring and perpetual practice.

Often copied but never duplicated, The Partner Institute™ (TPI) is proud to stand on its proven record of helping accountants address this challenge head-on. Our comprehensive, three-year experience provides participants with world-class training, and a continuous learning environment, coupled with a culture of accountability that is unmatched.

Since 2004, TPI has served as the accounting profession's premier partner development program—providing world-class content, processes and tools designed specifically for the CPA. Our program adheres to an empowered learning model that meets the unique needs of the adult learner and ensures real-world application of the knowledge within the participant's firm. Additionally, our curriculum has been specifically designed to develop the personal, interpersonal, managerial and organizational capabilities of its participants across five key areas:



Leadership



Productivity



Communication



Practice Development



Practice Management

Whether you are a partner or a partner-to-be, our three-year, multi-disciplinary experience will help you develop the skills and attributes needed to successfully assume a leadership role at your firm.



The Growth Partnership 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).

### Session 1

**Timeframe:** January  
**Location:** Orlando, FL  
**Length:** 2.5 Days

**Content:**  
The 7 Habits of Highly Effective People, Experiential Learning Opportunity

**Recommended CPE (hrs.):**  
(20) Personal Development

COACHING

### Webinar 1

**Timeframe:** May  
**Length:** 1-2 Hours

**Content:**  
Time Management for Microsoft® Outlook®: Powered by The 5 Choices to Extraordinary Productivity

**Recommended CPE (hrs.):**  
(2) Personal Development

### Session 2

**Timeframe:** June  
**Location:** San Diego, CA  
**Length:** 2.5 Days

**Content:**  
Success Lab + Project Management Essentials; Business Writing Skills; Present Like a Pro! Experiential Learning Opportunity

**Recommended CPE (hrs.):**  
(14) Communications & Marketing  
(6) Management Services

COACHING

### Webinar 1

**Timeframe:** August/September  
**Length:** 1-2 Hours

**Content:**  
Learn Faster, Lead Better: Sharpen Your Leadership Judgment

**Recommended CPE (hrs.):**  
(2) Personal Development

### Session 3

**Timeframe:** October  
**Location:** Dallas, TX  
**Length:** 2.5 Days

**Content:**  
Success Lab + DISC in Action for Leadership Impact; Conflict Agility: Turning Tension into Opportunity; Experiential Learning Opportunity

**Recommended CPE (hrs.):**  
(12) Personal Development  
(8) Communications & Marketing

COACHING

### Webinar 3

**Timeframe:** January  
**Length:** 1-2 Hours

**Content:**  
Survey Analytics: Diving into IPA's Operational Survey Data

**Recommended CPE (hrs.):**  
(2) Business Management & Organization

COACHING

### Session 4

**Timeframe:** April/May  
**Location:** Washington, DC  
**Length:** 2.5 Days

**Content:**  
Success Lab + The 4 Essential Roles of Leadership; Best Practices Forum #1; Experiential Learning Opportunity

**Recommended CPE (hrs.):**  
(16) Business Management & Organization  
(4) Personal Development

COACHING

### Webinar 4

**Timeframe:** August/September  
**Length:** 1-2 Hours

**Content:**  
Leading Generations

**Recommended CPE (hrs.):**  
(2) Personal Development

### Session 5

**Timeframe:** November  
**Location:** Scottsdale, AZ  
**Length:** 2.5 Days

**Content:**  
Success Lab + Multipliers; Building High-Trust Teams: From Dysfunction to Alignment; Best Practices Forum #2; Experiential Learning Opportunity

**Recommended CPE (hrs.):**  
(20) Personal Development

COACHING

### Webinar 5

**Timeframe:** January  
**Length:** 1-2 Hours

**Content:**  
How to Modernize Your Accounting Tech Stack with Mature Innovations

**Recommended CPE (hrs.):**  
(2) Business Management & Organization

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### Session 6

**Timeframe:** May  
**Location:** Nashville, TN  
**Length:** 2.5 Days

**Content:**  
Success Lab + SPIN Selling & the PIF Process; Disciplined Marketing in a CPA Firm; Best Practices Forum #3; Experiential Learning Opportunity

**Recommended CPE (hrs.):**  
(16) Communications & Marketing  
(4) Personal Development

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### Webinar 6

**Timeframe:** August/September  
**Length:** 1-2 Hours

**Content:**  
Change Management

**Recommended CPE (hrs.):**  
(2) Personal Development

### Session 7

**Timeframe:** October/November  
**Location:** San Juan, PR  
**Length:** 2.5 Days

**Content:**  
Final Success Lab + Firm Metrics; What's Next After TPI; Experiential Learning Opportunity; Graduation

**Recommended CPE (hrs.):**  
(16) Personal Development  
(4) Business Management & Organization

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### Session 8 – Reunion\*

**Timeframe:** October  
**Location:** TBD  
**Length:** 1.5-2 Days

**Content:**  
TBD

*\*Optional Session at Additional Cost*

the partner  
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