



SUCCESSION INSTITUTE
LEADERSHIP
ACADEMY

SILA 2025-2026



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THE SILA PROGRAM

REAL WORLD CHALLENGES— REAL WORLD CURRICULUM

This high-impact program will help your leaders and leaders-to-be develop the key skills necessary for the successful continuation of the firm. The program, which will take place over about six months, includes:

- Interactive discussion and learning with manager peer group, guided by accounting firm consultants working with firms throughout North America
- Practical ideas for newer leaders in accounting firms from consultants who are CPAs themselves and who are experts in accounting firm management and leadership
- Training from materials created by our instructors from the work they do with accounting firms day in and day out
- Baseline assessments and webinar debriefs for increased self-awareness
- Coaching discussions at the beginning and end of the program to identify and work-on the participants learning objectives and developmental goals
- Three in-person workshops with live instructor on skills leaders need:
 - ~ Situational Leadership® workshop to enhance delegation, supervision and development skills - 1.5 days
 - ~ Business Development and Communication Skills workshop - 1.5 days
 - ~ Practice Management, People Development, Change and Speaking Workshop - 2.5 days
- Webinars with live instructor (Group Internet Based) – Four 1+ hour sessions
 - ~ Assessment debrief webinar
 - ~ Follow-up webinars after each workshop
- CPEⁱ credit granted for completed program webinars and workshops (up to 48 CPE hours)

YOUR INVESTMENT

\$8,495 per participant includes all assessments, workshops, webinars and coaching. Discounts available for more than one attendee – contact us!

PREREQUISITES

Participants should have supervisory experience or accounting firm management experience.



ⁱ Succession Institute, LLC 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

Field of Study: Business Management & Organization

Program Level: Intermediate

Advance Preparation: No advance preparation

THE SILA 2025-2026 SCHEDULE

<u>Succession Institute Leadership Academy (SILA) Activity</u>	<u>Date</u>
Coach/Mentor identified and coach contact info sent to Succession Institute - deadline/DUE date	*DUE* Thursday, July 3, 2025
Program Launch Webinar Participants and Coaches/Mentors invited, Recorded in case unable to attend (up to 30 mins)	July 7, 2025 Monday @ 11:00 am -12:30 pm ET
DiSC® Self-Assessments (7 days to complete)	July 8-14, 2025
360° evaluators identified and contact info for each sent to Succession Institute – deadline/DUE date	*DUE* Wednesday, July 9, 2025
Succession Institute 360° Performance Assessment (SIPA™) (10 days to complete)	July 14-23, 2025
CV form shared with cohort colleagues – deadline/DUE date	*DUE* July 23, 2025
Webinar on “Everything DiSC® Management Profile - Self-Awareness of Styles” and “SIPA™ Self-awareness of Management Strengths and Weaknesses” (1.5 Hours)	July 25, 2025 Friday @ 1:00-2:30 pm ET
Situational Leadership® 360° Assessments (10 days to complete)	July 25- August 4, 2025
DiSC® and SIPA™ Debrief Phone Calls with each Participant and his/her Coach/Mentor (1 Hour)	August 4-8, 2025 Monday-Friday
#1 Workshop: Situational Leadership™ (1.5 Days)	August 14-15, 2025 8:00-5:00 CT Thursday & 8:00-1:00 CT Friday Location: TBD
Webinar to follow up the Situational Leadership® workshop (1.5 Hours)	September 16, 2025 Tuesday @ 1:00-2:30 pm ET
#2 Workshop: Communication and Business Development (1.5 Days)	October 20-21, 2025 8:00-5:00 PT Monday & 8:00-1:00 PT Tuesday Location: TBD
Thomas Kilmann Conflict Mode Instrument (TKI®) Self-Assessment (7 days to complete)	November 10-17, 2025
Webinar to follow up the Communication and Business Development workshop (1.5 Hours)	November 17, 2025 Monday @ 12:30-2:00 pm ET
#3 Workshop: Practice Management, People Development, Change and Speaking (2.5 Days)	December 3-5, 2025 8:00-5:00 ET Wednesday & 8:00-5:00 ET Thursday & 8:00-1:00 ET Friday Location: Sarasota, FL
Webinar to follow up the Practice Management, People Development, Change and Speaking workshop (1.5 Hours)	December 17, 2025 Wednesday @ 11:00am-12:30pm ET

All workshops are in-person. Workshop dates and locations are all tentative.

OUR PHILOSOPHY

THE TIME IS NOW!

Many Baby Boomers who are founding members of their firms have a strong entrepreneurial instinct, and have guided their firms successfully over the years, often through the sheer force of their will and personality. The partners of these entrepreneurs may not have had the opportunity to develop their leadership and decision-making skills under such strong leadership. Where and when will they learn, and at what cost? Poor decisions by poorly prepared successors can cripple a firm.

A leader is often judged by 1) who they attract, and 2) whether their organization is ready to continue successfully without them. Developing management and leadership skills are core to positioning a firm for the future.

THE WRITING ON THE WALL

With many entrepreneurial partners looking at the near horizon to retire and sell their single largest asset (their firm), the accounting profession is facing profound changes. This is due primarily to the demographic forces it is facing, and these forces will not likely abate in the foreseeable future. In fact, it's likely to get worse before it gets better.

Consider these statistics:

- Due to the continued aging of the baby boomer generation, a massive number of entrepreneurs in accounting firms continue retiring in force over the next five years.
- Supporting this, and asking many questions to determine "Are we ready as a profession for this change?" in a recent survey of multi-owner CPA firms, we found that:
 - ~ 56% of firms do NOT have a written and approved succession plan in place
 - ~ 74% expect succession planning to be a significant issue in the next 5 years / 40% have challenges in the next 2 years
 - ~ 57% of firms will have 25% or more of Equity in play to transfer with Retirements, and 28% will have 50% or more in transition
 - ~ 33% of senior partners feel that the younger members of the firms are not ready to step into leadership positions

Start making those necessary changes you have knowingly been overlooking for the past decade or two --the value of your firm and your retirement income is at stake. Your legacy and your people are depending on you. It is not a quick change, so time is of the essence, and now is the right time to start.

PASSING THE TORCH WITHOUT GETTING BURNED

In the past, each retiring senior owner could count on two or more junior owners to take his or her place. In the very near future, senior owners will need to have developed their organizations in a way to allow the current partners to handle twice to three times the volume they currently manage. The implications of this change in business processes are significant since junior owners and managers (owners-to-be) must quickly ramp up their delegation and supervision skills, as well as their ability to manage clients. Additionally, the firm must hire and develop staff at a much faster pace so that there are more talented people to whom the owners and managers can delegate work.

If the remaining partners don't have the time (due to lack of delegation) or supportive infrastructure (due to the Upside-Down Staffing Pyramid™) to handle the client transfer from the retiring senior owners, there will be potentially disastrous implications. The remaining firm owners might not stay together and/or the benefits owed to the retired partners might never be paid in full. So, the options remaining for such an ill-equipped firm typically will be to sell or merge the firm. However, the merger or sale strategy will be losing a little bit of its luster day by day. We believe the market for accounting firms, although strong or steady currently, will get softer, and it is our prediction that in the next several years, so many baby boomers will be retiring that it will become a buyer's market. The result will be predictably harsh financially for those who haven't created a foundation for enduring change at their firms and are forced to merge or sell their practices due to a lack of other viable options. We are not suggesting that selling or merging your firm will be a bad solution, but rather, that your plan needs to ensure that it isn't your ONLY option!!



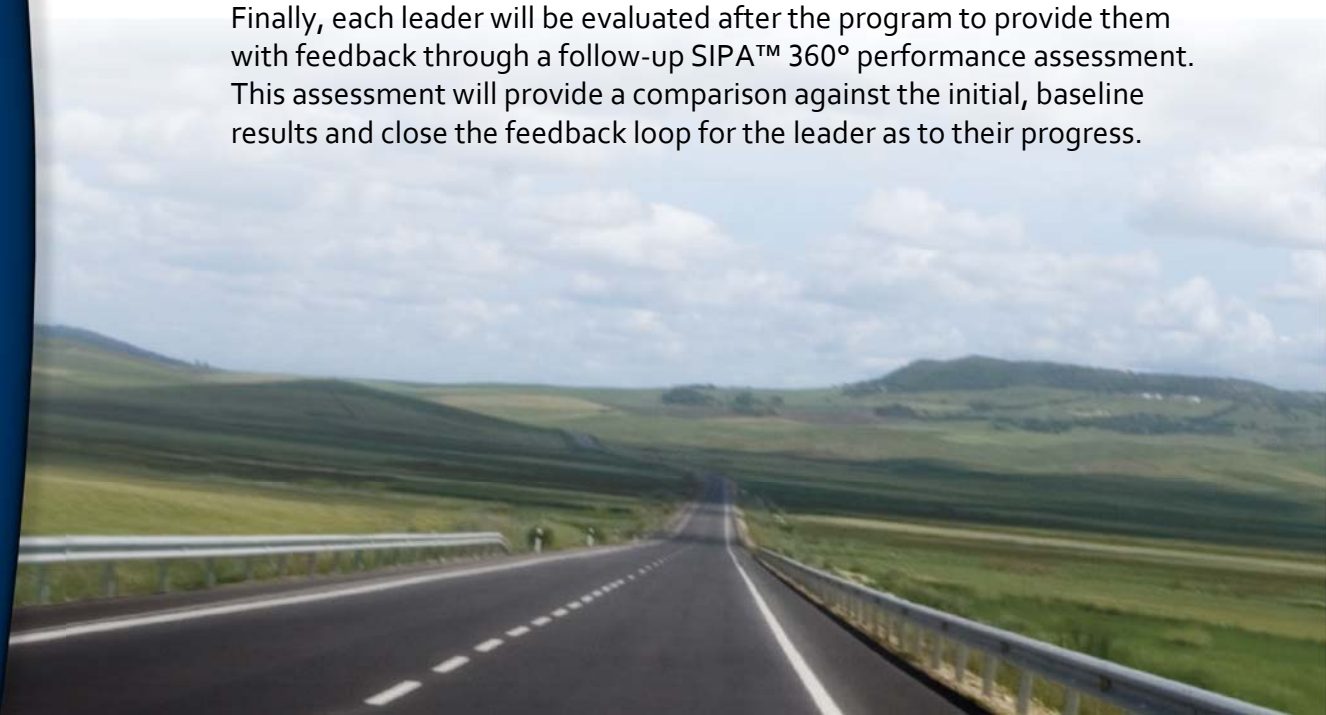
A SAFE PATH TO THE FUTURE

At the Succession Institute, we've developed a path for owners and other accounting firm leaders to follow that will help them navigate the obstacles to positive change and create a foundation for enduring value at their firms. The path starts with some orientation as to a leader's existing state of readiness through the use of our proprietary SIPA™ 360° performance assessment instrument. This instrument is customized for each level of position in the firm. It provides opportunities for rare insight into what leaders are doing that's working well, and where the leaders need to improve their effectiveness. We combine this with other assessments, such as a personal style (limited personality profile) assessment, that help the leaders gain a better understanding about themselves as we kick off the program.

Following this, we take the leaders through a rigorous program built around the Succession Institute's proprietary materials, customized for accounting firms, and augmented by Dr. Paul Hersey's exceptional Situational Leadership® management training program. In addition to covering best management practices, how to better train, manage and motivate your people, and ways to evolve your influence and delegation skills, the participants come away with a better understanding of the changes they need to make personally to become more effective managers and leaders.

The program described in this brochure includes ongoing coaching assistance to help the participants develop more traction supporting their personal change efforts. Coaching is performed by members of the Succession Institute who have over 30 years of experience each as CPAs as well as working with CPAs and accountants, both in the United States and internationally.

Finally, each leader will be evaluated after the program to provide them with feedback through a follow-up SIPA™ 360° performance assessment. This assessment will provide a comparison against the initial, baseline results and close the feedback loop for the leader as to their progress.



SIPA™

(SUCCESSION INSTITUTE PERFORMANCE ASSESSMENT™)

The Succession Institute Performance Assessment™ (SIPA™) is a unique 360° assessment that clearly identifies the attributes that will help an individual become a more effective professional and leader. This assessment covers a variety of competencies found to be important for success as a professional in this demanding business environment. This tool was developed based on the insights and lessons learned from the world's greatest leaders and on our day-to-day work with accountants both domestic and internationally from all sizes of public accounting firms who exhibit best practice professional and managerial skills and behaviors.

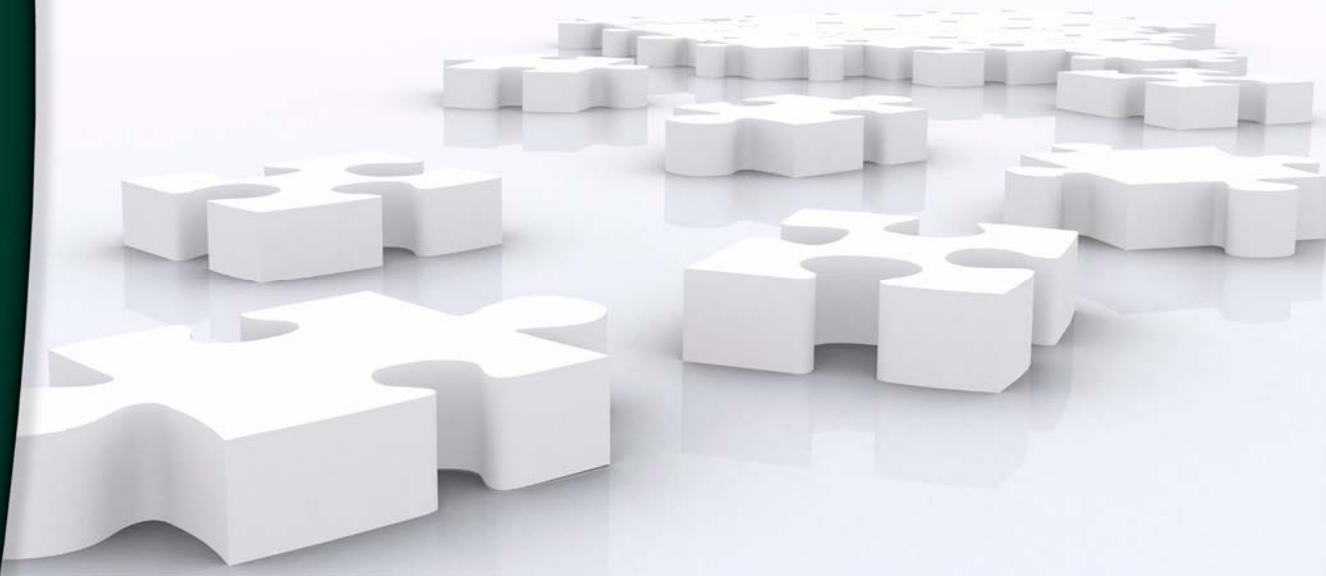
Developed utilizing primary and secondary research, the SIPA™ reflects the latest professional best practices among those professionals working in public practice. This online assessment has been designed with practical business application in mind and is part of the Succession Institute Competency Framework™ which provides competency definitions for eight levels of positions within a typical accounting firm, from entry level staff to equity owner. The complete set of reports features a "Performance Index" which provides the overall effectiveness scores as perceived by Self, Boss, Peers, and Direct Reports. The unique "Report Card" feature clearly indicates the assessed person's Capabilities and Constraints as perceived by each of the groups evaluating the leader.

In addition to showing the capabilities and constraints that the evaluated professional brings to the table at his or her firm or area of responsibility, it also prioritizes these areas to help that person understand where to focus first on improvement efforts. The assessment report comes with a Resource Guide, a tool that allows participants and their bosses or coaches to map out a development plan that addresses the competencies by identifying specific behaviors, either through high scores or low scores, each professional tends to exhibit under a particular competency.

We use the SIPA™ at the beginning of our leadership programs to generate an overall baseline effectiveness score and to help participants identify where they stand, and sometimes we offer it again at the end of the programs to compare progress achieved against the baseline established at the beginning.

Other Uses for the SIPA™ Assessment and Succession Institute Competency Framework™ for the partners in the program:

- To help partners develop professional effectiveness throughout their organizations via performance evaluations, career coaching, and to fill the leadership pipeline for assurance of smooth and successful transitions in the succession planning process.
- To coach partners and managers toward improved individual performance as leaders and managers in their firms. The feedback from this instrument, coupled with the results of interviews, provide a valuable database to help improve a leader's self-awareness.
- As a solution to leadership problems identified through surveys, staff and owner interviews, etc., to help firms address people issues in an objective manner.
- As the cornerstone for executive education and continuing professional education for owners, managers and supervisors in accounting firms.
- To accelerate the development of the next layer of leaders with an accounting firm.
- To improve organizational effectiveness through improved managerial leadership practices and improved professional competencies from the top on down through the organization.



SITUATIONAL LEADERSHIP®



Tommye and Bill, in their work with accounting firms, associations and companies of all sizes, have been teaching leadership and coaching individuals to become better managers and leaders for the past three decades. During this time, they have developed materials and delivered everything from keynote speeches and one-day workshops, to multi-year training programs training on this subject matter. The late Dr. Paul Hersey's teachings and research conclusions from his best-selling book Situational Leadership® are a cornerstone of their programs because they know it is difficult to become a better leader and manager if you don't have the necessary tools to lead, manage and develop the people around you.

Because of this appreciation, the Succession Institute requested and was granted special Affiliate privileges by The Center for Leadership Studies, Inc. (CLS) so they could incorporate Dr. Hersey's materials into their programs. The Situational Leadership® materials are an integral part of our curriculum.

Situational Leadership® makes up the first two days of the Leadership Academy. It is focused on helping partners, managers and/or supervisors understand how people are influenced as well as how to develop strategies for increasing your firm's productivity and improving the quality of your owners' and managers' effectiveness. By focusing on the skills necessary to constructively influence employees through proper delegation, supervision and development, Situational Leadership® complements and strengthens any existing management system, including the system used in the broader SIPA™ assessment.

Situational Leadership® is a proven and powerful skills-based program that teaches accounting firm owners, managers and supervisors how to vary their leadership style to match the behavioral needs of the individual or group they're attempting to influence, leading to improved employee performance.

When asked why Succession Institute switched from teaching just their own course materials to including those provided by The Center for Leadership Studies for additional support, the answer was simple:

"Not only are Dr. Hersey's materials excellent; as the founder of the field of Organizational Behavior, his research and teachings are the most field

tested and practical to implement. The problem with most management training is that, while it is interesting and espouses values and ethics you should live by, it doesn't teach you how to better lead and manage in practice. We should know ... We've been teaching in this area for a long time. With Dr. Hersey's materials, the training and feedback mechanisms are in sync and designed to help the leader -- and those who follow the leader -- evolve.

Once you have worked through this material, you are armed with a practical approach to management that can be implemented instantly. One final point! Dr. Hersey's training has predominantly been aimed at the Fortune 1000 and similar companies because of the resources required to support programming of this high caliber. As an affiliate of The Center for Leadership Studies, Succession Institute is well positioned to bring a new level of excellence to leadership and management training, as well as coaching, at a price that the small and medium sized companies and CPA firms we serve can afford."



CURRICULUM DEVELOPMENT

Our programs are developed and conducted by the founding members of the Succession Institute. They each have over 30 years of experience working with accounting and business executives. They understand the challenges leaders face in today's organizations and know what usually works to overcome those challenges. Our development and training offerings are experientially based to ensure that participants acquire the concepts and skills, using a multitude of media, techniques and tools, such as:

- Pre-work – multiple assessment instruments for style and skills feedback
- Lecture with application of real-life situations
- Group facilitated discussions
- Written exercises
- Video presentations
- Behavior modeling examples
- Case studies
- Role-play scenarios
- A simulator board game
- The development of action plans
- Coaching throughout the program period
- Post-work assessment to ascertain progress
- A mobile device application

Together these activities and components will make up a highly interactive and effective development system that challenges the participants to evolve, create a personal roadmap for change, and increase their skill levels while enjoying the learning environment. We invite your calls and questions about how Succession Institute's programming can create and deliver the kind of leadership and professional skills training that your firm needs.



PROGRAM DETAILS

PRE-KICKOFF ACTIVITIES

Identify Coach (or Mentor)

Each participant should have a coach or mentor back at the firm who can help the participant integrate the skills developed in the program into the daily routines of the workplace. The coach will:

- Consult with the participant and Succession Institute at the beginning and end of the program to discuss program goals for the participant, and their progress towards those goals.
- Submit feedback to the participant by completing 360° assessments as required.
- Consult with the participant after their assessment debrief with Succession Institute.
- Consult with the participant after each workshop to discuss what they've covered, and how it relates to their firm's practices.
- Conduct short informal discussions with participant as needed between workshops.

As to whom to choose—a “mentor” per se often is someone with whom you do not work, in the strictest sense of the word, while a “coach” is usually someone who works more closely with you. We see some firms using mentors, some firms using coaches, and some firms getting both the regular mentor involved along with someone that works with the participant as more of a coach.

We are partial to having a coach per se – but it's up to the participant and the partners at your firm as to how you structure this. To us a coach is someone:

- with whom the participant works,
- that sees/works with the participant on a frequent enough basis to know if they are attempting behavioral changes,
- who can help hold them accountable for identified changes,
- who provides suggestions for how to make those changes and how to monitor the progress, and with whom the participant can discuss problems that may crop up in the implementation, etc.
- with more experience than the participant,
- to whom the participant might report, and
- who takes an active interest in making their people better, faster and stronger - rather than a peer.

Identify Evaluators

Each participant should submit a list of evaluators for the 360° evaluations. In addition to a self-evaluation, participants need to acquire feedback from their:

- Bosses: one or more people that the participant reports to at work, as well as the participant's mentor/coach.
- Peers: four to six peers the participant works with, and neither the participant nor the peer reports to the other. (Please note: In most firms, partners, even managing partners, choose to evaluate other partners as "peers.")
- Direct Reports: four to six direct reports that report to the participant in some capacity.

Program Launch Webinar for Participants & Coaches/Mentors (up to 30 minutes)

Each participant should attend our Welcome Webinar, and Coaches/Mentors are (optionally) invited to attend as well. Topics include:

- Roles of coaches/mentors
- Program CPE
- Dates and places
- Program requirements
- Questions and Answers

BASELINE ASSESSMENTS FOR INCREASED SELF-AWARENESS

These assessments, webinars, and one-on-one interpretation and coaching/consulting calls help to develop self-awareness of existing preferences and styles in motivational needs and conflict, as well as existing strengths and areas for improvement in managerial leadership skills such as delegation and supervision.

SIPA™ 360° Performance Assessments (20 Minutes)

The Succession Institute 360° Performance Assessment™ (SIPA™) consists of over 80 questions covering 15 competency areas. Responses are desired from no fewer than seven (7) people that work with the participant as well as his/her self-assessment. It is used initially to identify the most important competency areas on which to focus for improvement.

DiSC® Self-Assessments (10 Minutes)

The Everything DiSC® Management personality profile (self-assessment) is an assessment tool centered around four personality traits deemed important in the workplace—dominance/assertiveness, influence/extroversion, steadiness/patience and conscientiousness/risk avoidance. The results help the participants generate an enhanced level of self-awareness in terms of their behaviors and the potential impacts of those behaviors, either good or bad, on others with whom they work, from the bottom to the top of the organization.

Webinar on "Everything DiSC® Management Profile - Self-Awareness of Styles" and SIPA™ "Self-Awareness of Management Strengths and Weaknesses" - Reports Delivered to Participants (up to 1.5 Hours)

Learning objectives of this this webinar:

- Understand how to interpret the Everything DiSC® Management Profile report
- Create self-awareness of existing preferences and styles in motivational needs through interpretation and use of the DiSC® profile report
- Group review of assessment results with implications for leadership and teamwork
- Understand how to interpret the SIPA™ report
- Create self-awareness of existing strengths and weaknesses in managerial leadership skills through interpretation and use of the SIPA™ profile report
- Group review of assessment results with implications for leadership and firm management

Participants receive their Everything DiSC® Management profile reports and their SIPA™ profile reports after the conclusion of the webinar.

DiSC® and SIPA™ Debrief Phone Calls with Each Participant and his/her Coach or Mentor (up to 1 hour)

Three-way consulting call with each participant and his/her coach or mentor (together) to:

- Identify each participant's initial learning objectives as well as their mentor's/coach's insights and goals for the participant's development.
- Discuss their DiSC® and SIPA™ reports, review the strengths and weaknesses revealed by the assessments, and develop an individual Action Plan for improvements in specific capabilities in potential High-ROI areas.

Situational Leadership® 360° Assessments (5 Minutes)

The CLS Situational Leadership® 360 is a short 12-question assessment focused specifically on influence and management, which includes delegation to, and supervision and development of, the people who work for the participant. It also includes influencing and directing clients and vendors. Responses are desired from no fewer than seven (7) people that work with the participant as well as his/her self-assessment. Participants with larger firms normally invite some bosses/managers, peers and direct reports to complete this. For those with very few to no staff, they might want to consider including a few people that have experienced their working style, including clients and those they have served with on volunteer committees or boards in the recent past, etc. This assessment is used to identify participants' default leadership and management styles.

PROGRAM WORKSHOPS AND WEBINARS

#1 Workshop - Group Live: Situational Leadership® Foundational Principles for Managing and Leading Others (1.5 Days)

This workshop is designed to improve a leader's ability to develop others, customized for accountants in public practice with interactive, experiential exercises to practice the application of the principles learned.

Learning Objectives for Workshop on Situational Leadership®:

- Introduce the Situational Leadership® model and why it is important
- Understand how to assess the skill and motivation levels of employees, and match that with the appropriate leadership style
- Develop others and improve time-management through proper delegation
- Practice navigating appropriately between coaching, consulting, collaborating and managing styles
- Utilize case studies to practice consciously selecting a leadership style appropriate for a situation
- Provide communication skills and a common language to effectively influence employee behavior
- Practice a process to effectively cover difficult performance issues in an unemotional way, and accelerate the development and retention of talent
- Learn tips and techniques to improve time management
- List personal action items to take back to work

Webinar to Follow up the Situational Leadership® Workshop - Group Internet Based (up to 1.5 Hours)

Learning objectives of this follow-up webinar on implementation of Situational Leadership®:

- Review the Situational Leadership® Model
- Share how each of the participants is putting the Situational Leadership® model to use in day-to-day management situations
- Review experiences with delegation and discuss experiences with managing developmental and regressive situations
- Review what's been working, what hasn't worked as well
- Identify and overcome common roadblocks

#2 In-Person Workshop - Group Live: Business Development and Communication (1.5 Days)

This one-and-one-half-day workshop focuses on skills needed to interact effectively with clients and fulfill the role of Most Trusted Business Advisor, using case studies and experiential exercises to practice the application of the principles learned in this workshop.

Learning Objectives for Workshop on Business Development and Communication Skills:

- Review what's been working, what hasn't worked as well as a result of this program to date
- Understand principles of effective communication, including nonverbal communication, effective listening skills, and asking the right questions, through lecture and experiential exercises
- Learn about the role and responsibilities of the Most Trusted Business Advisor (MTBA), acting as your client's general contractor, through lecture and experiential exercises to demonstrate how to ask appropriate questions, follow up on answers with more questions and probe for understanding without drilling down too quickly or misunderstanding the client's real needs
- Improve one's investigation and opportunity identification skills
- Quantify the potential benefits the advisor offers to the client, and understand the role quantification plays in both helping close business as well as providing important assistance to the client
- Learn how to identify expanded services for an existing client, sell, cross-sell, and close business
- Use a variety of role-play exercises to gain experience using the new tools learned in this workshop
- List personal action items to take back to work

Webinar to Follow Up the Business Development and Communication workshop - Group Internet Based (up to 1.5 Hours)

Learning objectives of this follow-up webinar on the implementation of the skills learned in the Business Development and Communication workshop:

- Review business development and communication skills and behaviors
- Discuss recent experiences using opportunity-identification skills
- Review how the MTBA model was used in various client situations
- Cover how to further cement client relationships through MTBA discussions
- Review what's been working, what hasn't worked as well
- Identify and overcome common roadblocks

#3 In-Person Workshop -Group Live: Practice Management, People Development, Change and Speaking Workshop (2.5 Days)

This two-and-one-half-day workshop is divided into two main programs.

Part 1 includes current best practices in general management, conflict management and negotiation, as well as managing change. This workshop includes experiential exercises to allow the participants to build skills in these critical areas in a low-risk environment

Part 2 allows participants to build up their formal client presentation skills through a series of group activities and exercises.

Learning Objectives for Part 1 of the Workshop on Practice Management, People Development, Change and Speaking:

- Review what's been working, what hasn't worked as well as a result of this program to date
- Introduce and discuss accounting profession trends and benchmarks
- Understand the EWYK versus the BAV models of operations, and impact on firm management and policies
- Review the leadership and management roles and why you need both
- Identify best practices in accounting firm governance and management, trends and practices
- Develop people to be better, faster, stronger with developmental coaching
- Learn how and when to be assertive to effectively influence others
- Review how to manage conflict effectively
- Understand why change is difficult and best practices for implementing change
- Understand the enablers for change by reviewing change management basics

Learning Objectives for Part 2 of the Workshop on Practice Management, People Development, Change and Speaking:

- Differentiate speaking for different purposes - from public speaking, to client proposal presentations, to client meeting management
- Develop your presentation skills by using techniques such as controlling your eyes, gesturing appropriately, handling questions, projecting your voice, and more
- Receive presentation tips and Elevator Story for the Firm
- List personal action items to take back to work
- Program wrap-up activities

Webinar to Follow Up the Practice Management, People Development, Change and Speaking workshop - Group Internet Based (up to 1.5 Hours)

Learning objectives of this follow-up webinar on the implementation of the skills learned in the Practice Management, People Development, Change and Speaking workshop:

- Follow up on the implementation of the skills learned in the Practice Management, People Development, Change and Speaking workshop.
- Review best practices for accounting firms
- Share how best practices for the management of accounting firm are being put to use in participant's firms
- Discuss personal experiences with implementing the best practices
- Share how participants have been leveraging their public speaking and presentations skills in their daily practice
- Evaluate how the participants are putting their public speaking and presentations skills into action
- Review what's been working, what hasn't worked as well
- Identify and overcome common roadblocks

WRAP-UP ACTIVITIES

Exit Consulting Calls with Each Participant and his/her Coach or Mentor (up to 30-minutes with each pair)

Three-way consulting call with each participant and his/her coach or mentor (together) to:

- Review their initial objectives,
- Discuss their progress and improvements through the program's training and coaching, and
- Discuss their plans moving forward.

POLICIES

Refund & Cancellation Policy:

To cancel your registration and request a refund, please email info@successioninstitute.com, or call our office: (512) 338-1006. Refunds are pro-rated based on program activities completed and costs incurred at the time of cancellation. You must cancel prior to the start date of the first program activity (first item in the schedule) for a full refund.

Although the Succession Institute does not intend to cancel any workshops or webinars at this time, in the event of an unforeseen circumstance or unexpected situation, we reserve the right to cancel any workshop or webinar as may be necessary. We will provide a pro-rated refund of your purchase price or reschedule for a mutually convenient date if circumstances require us to cancel a workshop or webinar for which you are registered. If Succession Institute cancels or reschedules a workshop or webinar, we will inform all registrants and workshop planners via email.

Complaint Resolution Policy:

Succession Institute, LLC pledges to conduct its business with honesty and integrity. Should there be a complaint or concern about the quality of programming or the level of service, Succession Institute will make every effort to resolve it. Complaints should be expressed in writing and directed to Succession Institute at 2603 Pearce Road, Austin, TX 78730 or (512) 338-1006 or info@successioninstitute.com.

Late Registration Policy:

Succession Institute, LLC will allow late registrations after the program begins provided the registrants make-up the activities missed. Please contact us at (512)338-1006 to discuss.

CPE Policy:

Succession Institute, LLC will monitor attendance and participation in webinars and workshops for CPE credit. For webinars, attendance and participation is monitored via log in/out times, poll question responsiveness, and chat activity. For workshops, attendance is monitored via instructor attendance check, as well as participant contributions to group discussions and participation in group activities.

SUPPLEMENT FOR COACHES AND MENTORS

Each participant should have a coach or mentor back at the firm who can help the participant integrate the skills developed in the program into the daily routines of the workplace.

We've found that the participants who get the most out of the program are those whose coaches and mentors are the most engaged with them throughout the program. Here are the best practices for coaches and mentors we've seen over the last few years.

BEST PRACTICES FOR COACHES AND MENTORS

Preparation for the Program

1. Review the program overview, curriculum, and schedule in this document.
2. Identify and share with your participant the learning objectives you would like them to pursue in the program.

After the Initial/Baseline Assessments

1. Attend the "SIPA Call" with your participant and the Succession Institute representative to discuss learning objectives, any questions you may have about the program, and review the Baseline Assessments.
2. After the SIPA Call, meet with your participant to further discuss matters of importance you gleaned from the assessment debrief.
3. Help your participant identify and prioritize those areas for change indicated by the assessment, including:
 - Desired outcome.
 - Action plans to institute changes.
 - Metrics to determine how well actions being taken are working toward the desired outcome.
 - Monitoring – how frequently you'll be checking in with him or her as to accomplishment of action plans and results of metrics.
4. Prior to your participant's attendance at the first workshop, review the background information (CV) forms for the cohort participants and help your participant identify a handful of people that he or she should attempt to meet for networking purposes.

Throughout the Program

1. After each workshop that your participant attends, meet with your participant for a debriefing on the workshop. During this meeting, the discussion likely will include:
 - Key matters covered at the workshop.
 - Areas of particular interest to your participant, including those where he or she may attempt to implement some changes as a result.
 - Practices of other firms relating to matters covered vis-à-vis your firm's approaches.
 - How you might be able to help your participant in his or her change efforts by removing barriers to implementation and/or helping to hold them accountable.
2. Continue to discuss with your participant his or her progress in desired changes and overall growth as a managerial leader as a result of their participation in the program.
3. At any time that you have questions about the program, your participant's activities or progress, contact the Succession Institute.

End of Program

1. Attend the "Exit Call" with your participant and the Succession Institute representative.
2. Discuss your participants progress in desired changes and overall growth as a managerial leader as a result of their participation in the program.
3. Discuss your perception of your individual's progress towards specific goals.
4. Discuss your participant's plans for the future.

PROGRAM FACULTY

Tommye E. Barie, CPA, Executive Vice President of Leadership Development



Tommye Barie is a recently retired partner of one of the 100 largest full-service accounting and consulting firms in the US. After more than thirty years as an audit and assurance partner, and as her last charge before retirement, she launched the Firm's Client Advisory Services practice. Tommye served on the firm's audit and assurance committee and the firm's FAST (forward and strategic thinking) committee.

Tommye has a proven track record of leadership and visioning with various organizations. Her thought leadership on culture, strategy and innovation led to Tommye being recognized as one of the 100 most influential people in the accounting profession, as published in Accounting Today. Additionally, the Michigan Society of CPAs recognized her with their Outstanding Visionary Award.



Tommye drives results and collaboration through balanced inspirational and strategic leadership. She is engaging and influences diverse teams to peak performance with strong interpersonal skills and vision. She has a rare blend of strategic and tactical abilities to facilitate desired outcomes.

In addition to serving her former accounting firm, Tommye is among the most well-known and highly respected leaders in the accounting profession. During 2014-2015 she served as Chair of the Board of the American Institute of CPAs, an organization with more than 412,000 members at the time and a budget of approximately \$200 million, and she previously served as Chair of the Florida Institute of CPAs. She currently serves on the Board of the National Association of State Boards of Accountancy's Center for Public Trust which is an organization whose mission is to champion the public trust by advancing ethical leadership in business, institutions and organizations.

Tommye is actively involved in the international accounting profession and currently represents the United States as a board member of the International Federation of Accountants (IFAC). She currently Chairs the Governance Committee and will lead the Organization's constitutional review process. The IFAC is a global organization supporting the development of and promoting the adoption and implementation of high-quality international standards.

Tommye has always placed importance on leveraging her leadership skills and experiences to influence the lives of young professionals. Throughout her career she has mentored and guided women and men in her own firm and in the many firms she has worked with throughout the United States. Additionally, she enjoys serving on the College of Business Advisory Boards for Stetson University and University of South Florida.



William "Bill" Pirollo, CPA, PFS, CFF, CGMA, Executive Vice President of Firm Services

William (Bill) Pirollo, CPA, PFS, CFF, CGMA is a recently retired partner in the accounting, consulting and financial services organization of DiSanto Priest & Co., CPAs located in Warwick, Rhode Island. Bill was managing partner of his own small firm before he merged with DiSanto Priest & Company where he served as director of Firm Administration and also served on the Firm's Executive committee.

For over 40 years, Bill's passion has been representing individuals and family/private owned businesses in a wide variety of service areas including tax, estate and life planning, wealth creation and management, merger and acquisition, succession planning and everything else in between. Bill's personalized, passionate and common-sense approach has been instrumental in establishing himself as his client's Most Trusted Business Advisor.

In 2023, Bill joined the consulting firm of The Succession Institute, LLC (SI). Together with Bill Reeb and Tommy Barie, the firm provides strategic management and leadership consulting to CPA Firms and private businesses across the country. Bill focuses his efforts on Trusted Advisor training, Leadership Development, Strategy and Governance and Firm Administration support.

Bill brings to SI not only his years of experience as a partner in public accounting and firm administration, but also a wealth of leadership and insight into the profession from his over 25 years of professional volunteer service.

Bill was appointed to the Board of Directors of the Association of International Certified Professional Accountants and a member of the Public Accounting (AICPA) Board from October 2015 through May 2019. Bill was elected and served as the Chairman of the Board of the AICPA with a term of June 2021 – 2022. He also served as Co-Chair of The Association of International Certified Professional Accountants for the same period. The AICPA and the Association represent the largest accounting membership body in the world with combined membership of over 650,000.

Bill has served numerous other roles for the AICPA including the Managing an Accounting Practice (MAP) Committee, the Small Firm Advocacy Committee, the Nominating Committee, the Relations with the Bar Association Committee, the AICPA Governing Council and is a Past Chair of The Private Company Practice Section (PCPS) Executive Committee, serving that committee for nine years. He is a recipient of the AICPA Sustained Service Award.

Additionally, Bill is past president of the Rhode Island Society of CPA's, the Central Rhode Island Chamber of Commerce and served on the Board of Directors of the Kent County Mental Health Association. He is a frequent local and national speaker on issues related to the state of the accounting profession, firm practice management and leadership.

Bill is an avid golfer, loves to cook, enjoys photography and travel. He lives in Arizona with his wife Joanne.



Bill Reeb, CPA, CITP, CGMA, Co-Founder and CEO

Bill has been consulting for three decades to all sizes of businesses, from Mom and Pop operations to *Fortune 100* companies, primarily in the areas of strategy, leadership and change management. He decided to add the credentials of CPA behind his advisory work and became a CPA in 1986. Prior to his life as a CPA, he worked for IBM in sales back in the late 70's. As an entrepreneur, Bill has founded seven small businesses, he had two ladies clothing stores, one retail computer software store, a software development firm, a computer consulting firm, a CPA firm, and his current management consulting firm Succession Institute, LLC.

As an award-winning public speaker, Bill lectures throughout the U.S. and Canada to thousands of executives and CPAs each year. In addition, he has been featured on numerous video-taped and live television programs. As an award-winning author, Bill is internationally published with hundreds of articles and columns to his credit. In addition, he authored a bi-monthly column called "In the Bill-iverse" which was distributed by numerous State CPA Societies as part of their Practice Management e-newsletter. Bill has been published by various magazines, journals and newspapers, and he has co-authored two books on Succession titled *Securing the Future: Building Your Firm's Succession Plan* with its companion field guide called, *Securing the Future: Implementing Your Firm's Succession Plan*. He also co-authored the *Succession Resource Center* website materials for PCPS in 2008 and the fourth edition of their consulting book called *Becoming A Trusted Business Advisor: How to Add Value, Improve Client Loyalty, and Increase Profits*. Finally, Bill's book on how to avoid getting stuck as an overachiever, fittingly titled *The Overachiever's Guide to Getting Unstuck*, is constantly used in the private coaching sessions he conducts with various leaders around the country. All of these books have been published by the American Institute of Certified Public Accountants (the AICPA).

Bill is an active volunteer who has served our profession in leadership roles on a national level for over 25 years. He was the 2019-2020 Chair of the Board of the AICPA, past member of the Board of Directors, past Commissioner on the National Accreditation Commission, and past member of Strategic Planning and many other committees. He is currently a member of AICPA Council, and serves as an advisory board member to several organizations, including CPAFMA.

Bill has been honored by being named as a CPA Ambassador, was presented the Pathfinder Award and served as the Texas Vision Delegate. *Accounting Today* has recognized his efforts by listing him as one of the *Top 100 Most Influential CPAs*, *CPA Magazine* has named him as one of the *Top 100 Most Influential Practitioners*, and *Inside Public Accounting* has listed him as one of the top 10 most recommended CPA firm consultants.

Finally, Bill enjoys a number of hobbies. He is an avid golfer and skier. But he spends the majority of his free time as a senior black belt teaching (as well as continually learning) in the tao wu hsian hua (way of infinite transformation) system, which incorporates comprehensive aspects of tae kwon do, karate, hapkido, kung fu, and tai chi.



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