

to create capacity for personal and professional success

# You don't need to add more hours to increase your capacity and decrease your stress

Many firms are feeling a capacity crisis. But the compression, burnout, stress and turnover firms are experiencing are merely symptoms of a larger problem: ineffective and outdated use of time, energy and focus.

Everyone is limited to 168 hours a week—so working more hours won't ensure long-term success.

Only by proactively planning and prioritizing the *right* things can individuals get out of the hamster wheel and find more enjoyment and success in their personal and professional lives.



**Who should register?** This program is ideal for firm partners and firm leadership teams. With firm management buy-in, you can take the program firm-wide. Participants should be prepared to be actively engaged in improving skills and applying lessons learned.

**What is included?** This program features incremental steps to help you learn, apply and practice the process:

- Pre-training assessment
- Ten ten-minute on-demand training sessions
- Two-hour, customized action plan virtual consultation
- Two-hour training on the Full Focus Planner
- Post-training assessment
- One-hour customized virtual consultation
- On-going consultation

#### What is the cost?

Firms: \$17,500 per firm for up to 20 participants (\$14,875 UAN)

Individuals: \$2,300 per registrant (\$1,950 UAN)

Learn a proven process for proactively choosing the highest use of your time, energy and focus

## Key Elements of the Choosing Your Focus Program

o reduce stress, improve efficiency, and see a noticeable improvement in participants' use of time, energy, and focus, we'll address individual effectiveness and the key areas that impact capacity at a team, department and firmwide level.

## **1** Pre-Training Assessment

To ensure everyone understands their own strengths and areas for improvement, all participants will complete a productivity and focus assessment to provide baseline scores prior to the training.

## On-Demand Training Sessions

#### **On-Demand Training Session Topics**

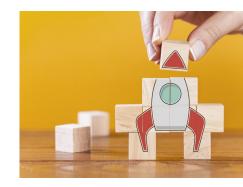
- Choosing Your Focus Introduction
- Definition of Productivity
- Scheduling
- Priority Management
- Meeting Effectiveness
- Delegation and Accountability
- Client Acceptance and Culling
- Training and Development
- Creating Time for Boredom
- Putting Theory into Action

Ten ten-minute, on-demand learning modules address causes of underlying capacity issues, the key areas of focus for fixing these issues, and why individuals continue to have the same problems over-and-over.

Individuals will complete homework assignments to determine barriers to implementing solutions and answer prompting questions to gather feedback in preparation for the customized consultation sessions.

## **3** Action Plan Consultation

Once participants have completed the assessment and training sessions, we'll schedule a two-hour consulting session focused on identifying the specific changes that individuals need to make in the areas of focus and actionable goals to improve their use of time, energy, and focus in each key area.



# 4 Full Focus Planner Training

Utilizing the *Full Focus Planner*, participants will implement a new system for planning, tracking and completing each high-priority focus item. To ensure participants can effectively use the system, Upstream facilitators hold a two-hour training session.

At the end of this session, all participants will understand how to use the planner on a daily, weekly, and quarterly basis. Each participant will need to purchase a planner (\$40-50 each) and commit to using it for 60 days.



## Key Elements of the Choosing Your Focus Program

## **5** Post-Training Assessment

To evaluate progress and determine next steps, we'll hold a post-training assessment. Participants will have a chance to analyze their current use of time, energy and focus to ensure they are making progress. They'll then create a plan for continued progress.

## **6** Program Success Consultation

To ensure ongoing progress, we'll hold a one-hour session to review assessment results and evaluate the success of the action plan developed at the start of the program.

Participants will commit to the next set of action items for improvement in each area. At the end of this session, each participant will understand specific action items to improve their use of time, energy, and focus.

## 7 Ongoing Consultation

Firms have access to an additional four hours of consultation as needed, so participants can submit questions and request time to discuss any challenges they are facing while implementing solutions or using the *Full Focus Planner* system.



## **8** Experienced Consultant

Jeremy Clopton brings years of leadership and consulting experience to this exciting program—along with a passion for and certification in *Full Focus* Training.

A Director at Upstream Academy, Jeremy's real-world experience comes both as a consultant and in the audit department of a top accounting and consulting firm. He uses this experience to provide a vision for improvement.



## **Unconditional Guarantee**

Like everything we do at Upstream, this program is unconditionally guaranteed. If you're not completely satisfied, we will, at your option, either waive your fee or accept that portion of the fee that reflects your level of satisfaction.



Upstream Academy will recommend 2 hours of CPE credit based on the level of participation in this course. Prerequisite: None Advanced Preparation: None. Skill level: Overview

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Phone: 406-495-1850

E-mail: <u>info@upstreamacademy.com.</u>
Website: <u>www.upstreamacademv.com</u>

Address: P.O. Box 1147, Helena, MT 59624-1147