



Effectively using your time, energy and focus
to create capacity for personal and professional success

One-Day
Workshop

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

Many firms are feeling a capacity crisis, and many individuals report high levels of work-related stress. But the compression, burnout, stress and turnover experienced are merely symptoms of a larger problem: ineffective and outdated use of time, energy and focus.

Working more hours won't ensure long-term success.

Instead individuals need help proactively planning and prioritizing the *right* things, so they can get out of the hamster wheel, build and maintain energy, 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:

- Ten ten-minute on-demand training sessions
- Homework questions to help you implement the lessons learned
- Intensive full-day session on the day before the HeadWaters conference (July 16, 2025) in Denver, Colorado.

What is the cost and refund policy?

The cost is \$975 per registrant (\$825 UAN). Registrants will be refunded registration fees less a \$100 cancellation charge, if they notify Upstream before June 10, 2025. After this date, only \$200 will be refunded.



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

Key Elements of the *Choosing Your Focus* Workshop

To 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 firm-wide level.

1 Pre-Workshop Preparation

To ensure everyone understands their own strengths and areas for improvement, all participants will work through a virtual workbook prior to the in-person session.

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

Individuals will complete homework assignments to determine barriers to implementing solutions and answer prompting questions to gather feedback in preparation for one-day workshop.

Additionally, participants will have access to ten ten-minute, on-demand learning modules that 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.

2 One-Day Workshop July 16, 2025

Participants attend an intensive one-day workshop on to help them plan for proactive changes to their habits and firm processes.

You've likely read books on working fewer hours, getting more done, or increasing productivity. You (or your firm) may also be working to institute a maximum-hours cap. We'll help you take these principles and apply them to your firm and your life.

The workshop will help identify specific changes that individuals need to make and provide guidance on actionable goals to improve their use of time, energy, and focus in each key area.

Workshop Topics

- Choosing Your Focus Introduction
- Improvements to Firm Systems and Processes
- Improving your Use of Time, Energy & Focus
- Leading Others to More Effectively Use Time, Energy, and Focus
- Discussion

3 Experienced Consultants

Jeremy Clopton brings years of leadership and consulting experience to this program—along with a passion for and certification in the *Full Focus Planner*. He will lead the session, while Courtney DeRonde will provide insights on real-firm application.

Need more information?

Contact us at 406-495-1850 or info@upstreamacademy.com.