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

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> 4-Part Series & Productivity Tool Set





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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But the compression, burnout, stress and turnover experienced are merely symptoms of a larger problem: ineffective and outdated use of time, energy and focus.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.

What is included? All firm members can participate in the series and use resources provided. The series features steps to help you learn, apply and practice processes:

- Ten ten-minute on-demand training sessions
- Homework questions and resources to help you implement the lessons learned
- Tools and guidance to implement strategies learned
- Four-part live series and access to the on-demand selfstudy versions for one year

What is the cost?

The cost is \$1,250 per firm (\$1,050 UAN Members)



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Learn a proven process for proactively choosing the highest use of your time, energy and focus 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 firm-wide level.

Pre-Series Preparation & Tools

To ensure everyone understands their own strengths and areas for improvement, participants can work through a virtual workbook prior to the series.

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

Homework assignments will help participants determine barriers to implementing solutions.

Additionally, participants will have access to ten ten-minute, ondemand 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.

Upstream will also provide tools to help you implement the process on an individual and firm level.

2 Four One-Hour Live Sessions

Firm members gain access to four one-hour sessions (live or on-demand) to help 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 series will help identify specific changes that individuals and the firm need to make and provide guidance on actionable goals to improve use of time, energy, and focus in each key area.

Tuesday, October 1: Making the Business Case for Better Focus Wednesday, October 16: Improving Focus through Firm Processes Thursday, October 31: Improving Focus through Individual Behaviors Friday, November 8: Creating an Implementation Plan

3 Experienced Consultant

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 and provide insights on real-firm application.

Need more information?

Register at <u>www.upstreamacademy.com</u> or contact us at 406-495-1850 or <u>info@upstreamacademy.com</u>.