



TIPS AND TRICKS FOR MANAGING THE MULTI-CLIENT ENVIRONMENT

Sample presentation subtitle

LEARNING OUTCOMES

- How to maximize time and energy using the GTD principles/10x Thinking
- How a project management software can accelerate the work in the multi-client environment.
- Identify and track key metrics to visualize your team's Capacity and Workloads

MAXIMIZING TIME & ENERGY

- Getting (The Right) Things Done
 - 100% Capture & Weekly Review
 - Time Blocking & Pomodoro Timers
- 10X (Pareto Principle)
 - Love/Hate Matrix
 - Why are you Here?!

MAXIMIZING TIME

Why Time Block

- Focus of Energy and Resources
- Switchtasking is a Myth

Blocking Options

- Day
- Week
- Month
- Quarter
- Year

MAXIMIZING ENERGY



MAXIMIZING ENERGY

Your Role – Why you get \$

- AMC Leadership/C-Suite
- Account Executive/Leader
- Functional/Front Line

Your Responsibilities

- Perform
- Practice/Train
- Recover/Rest

MAXIMIZING ENERGY



MAXIMIZING TIME & ENERGY

Energy

- Perform Blocks
- Practice Blocks
- Recover Blocks

Time

- Morning/Afternoon
- Day of the Week
- Time of the Month
- Beginning/End of Quarter
- Peaks and Valleys of the Year

MAXIMIZING TIME & ENERGY

The Power of Full Engagement

- To be fully engaged, we must be:
 - physically energized,
 - emotionally connected,
 - mentally focused
 - & spiritually aligned with a purpose beyond our immediate self-interest.

ASANA AS AN ACCELERATOR

- Basic units: tasks & projects
- Project uses: Project planning, Meeting agenda, Tracking data, Organize resources (wiki)
- Project Types (Evergreen, Topical, Summary)
- Estimated Time
- Integrated AI

ASANA AS AN ACCELERATOR

- Single Source of Truth
- 100% Capture (GTD)
- Service Delivery Schedule / Weekly Tactical
- Multi-home Tasks/Milestones?















ASANA AS AN ACCELERATOR EXAMPLE

A AP-LS Team ▾ ☆




Overview Members **All work** Messages Calendar Knowledge Links +

Projects [Send feedback](#)

🔍 New project

Name	Members	🔼 A to Z
 AP-LS 2025 Annual Conference <small>Joined</small>		
 AP-LS 2026 Annual Conference <small>Joined</small>		
 AP-LS Conference <small>Joined</small>		
 AP-LS L10 Meeting <small>Joined</small>		
 AP-LS Onboarding <small>Joined</small>		
 AP-LS Reimbursement/Payment Trac...		
 AP-LS Service_Delivery_Schedule <small>Joined</small>		

Templates [Send feedback](#)

-  New Template
-  Explore all templates
-  T: AP-LS Conference ...

ASANA AS AN ACCELERATOR EXAMPLE

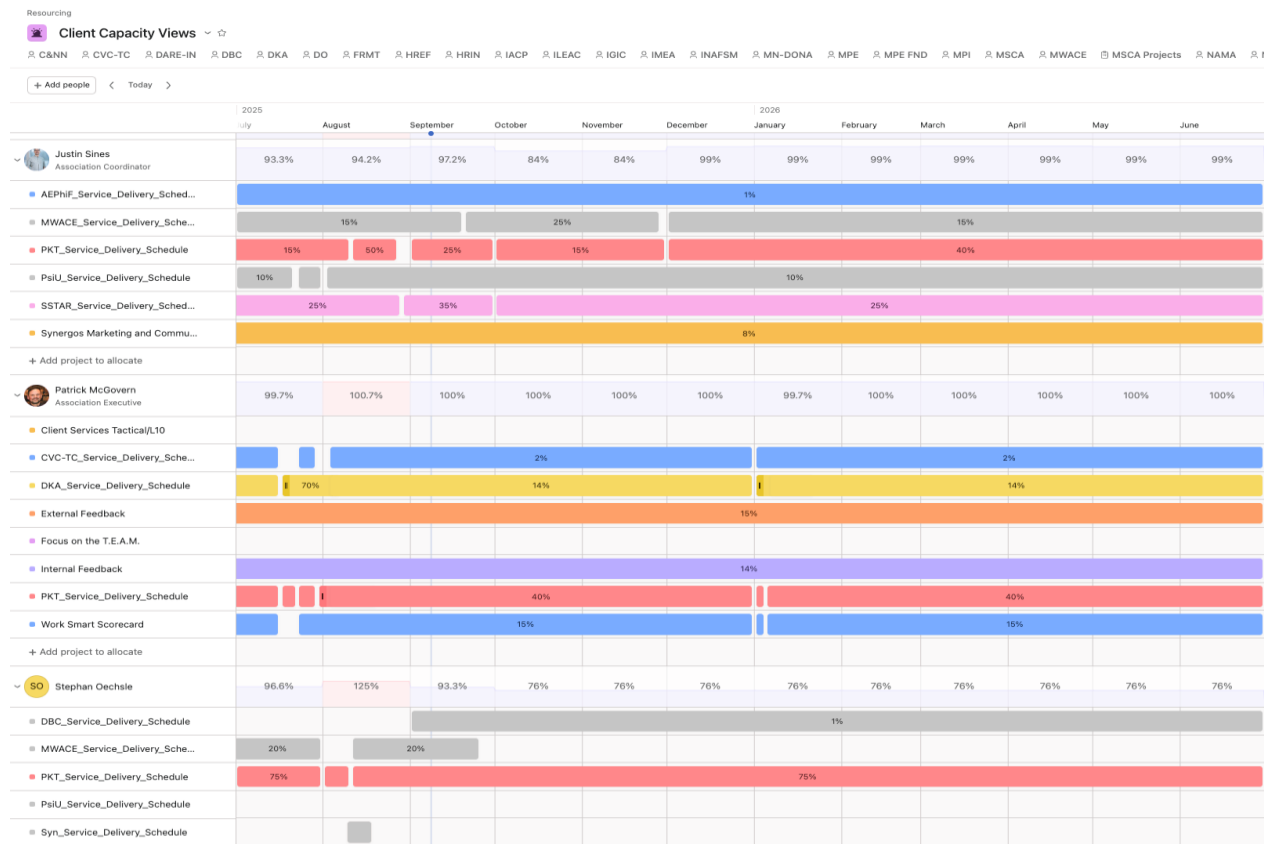
The left screenshot displays the Asana interface for the project 'AP-LS Service_Delivery_Schedule'. The view is set to 'List'. The tasks are organized by month, with a summary row for each month showing the total time. The tasks are as follows:

#	Name	Assignee	Due date	Estimated time	Client Area
June					
July					
August					
1	Execute New Committee Onb...	Veronica Ra...	Aug 31	6h 00m	Governa...
2	Annual Report Due to APA	Veronica Ra...	Aug 31	6h 00m	Member...
Add task...				SUM	12h 00m
September					
1	Send out doodle pool for November M...	Veronica Ra...	Friday		
2	Make sure all APA Conference sut...	Marti King	Friday	3h 00m	Finance
3	Site visit; Peppermill September	Lane Velayo	Sep 14 - 15		
4	Create the Newsletter timeline for 2021	Veronica Ra...	Sep 16	45m	MarCom
Add task...				SUM	3h 45m
October					
1	Document Membership Renewal	Marcus Fier...	Sep 5		Feedback
Add task...					
November					
Add task...					
December					

The right screenshot displays the Asana interface for the project 'AP-LS L10 Meeting'. The view is set to 'List'. The tasks are as follows:

#	Name	Assignee	Due date
Personal/Professional Best (2 mins)			
Scorecard (2 mins)			
Quarterly Rocks			
Client/Employee Headlines (2 mins)			
To Do (2 mins)			
Issues List (30 mins)			
1	Scope Creep?: Registration		
2	Memberclicks at limit for men		
Add task...			
Recap (5 mins)			
VTO Issues			
1-Year Plan			
Resources			
+ Add section			

ASANA AS AN ACCELERATOR EXAMPLE



ASANA AS AN ACCELERATOR EXAMPLE

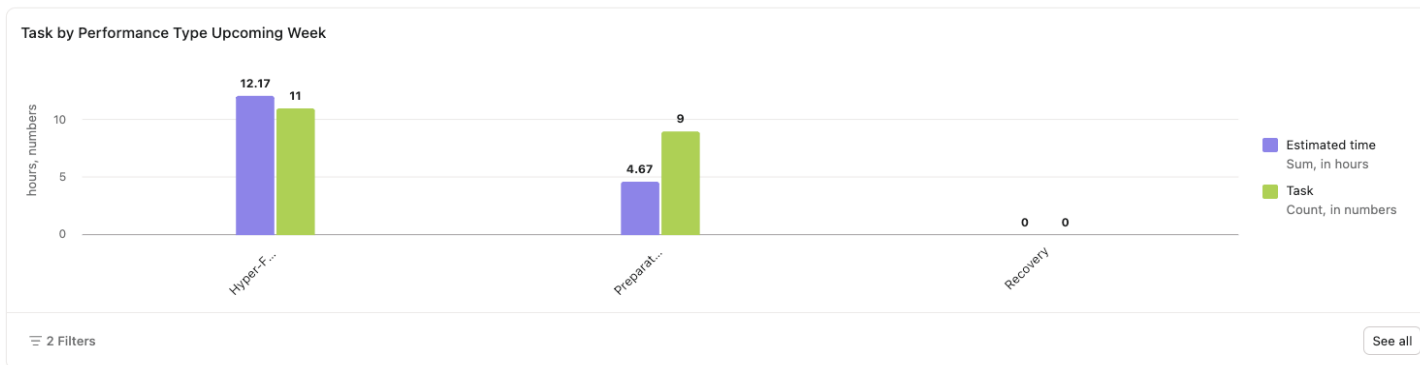
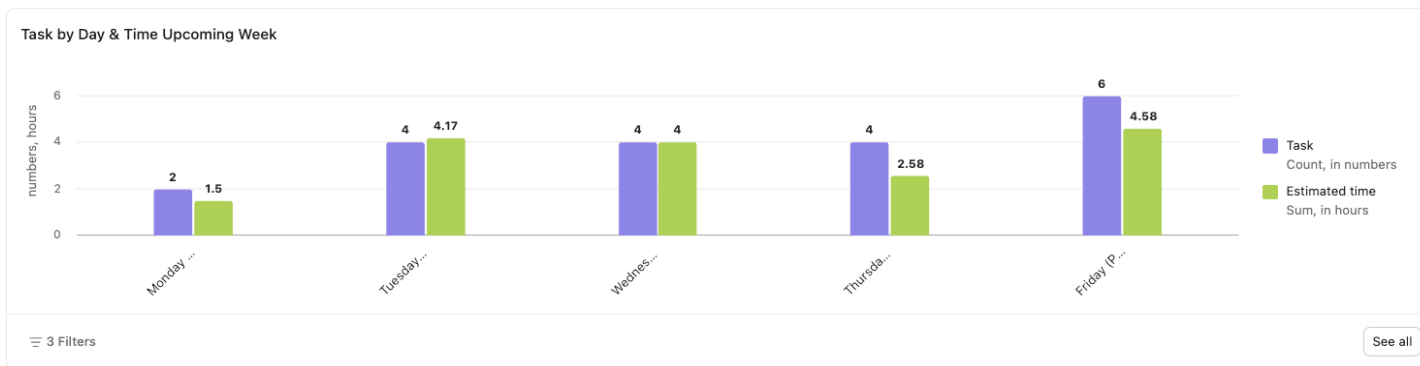
The screenshot displays the Asana project management interface in a weekly view, organized by day from Monday to Friday. Each day's column contains several task cards, each representing a specific task with its details, due date, and status.

- Monday (Preparation: ... 5)**
 - Lowell Applebaum: White Paper Oppy re EOS (Hyper-Focused, Oct 6, 8)
 - Discern ROI on Sintra (Preparation, Sep 22, 1)
 - Review Breaking Down the New Tax Bill for Associations | Webinar Recording (1h 00m Preparation, Oct 6, 1)
 - Mid Month Payroll (30m Preparation, Monday)
- Tuesday (Performance... 4)**
 - AMCI Annual Meeting Proposals Due (Ideaion Hyper-Focused, Tomorrow, 3 6)
 - Host Insurance Open Meeting (1h 00m Implementation Preparation, Tuesday)
 - The Markens Group > Deep Work: Building the Proposal for Synergos3T (40m Ideaion On Track Hyper-Focused, Sep 2 - 5 2:55pm)
 - Tuesday check-in with Integrator (30m Implementation Preparation)
- Wednesday (Performa... 5)**
 - IMEA Board Meeting (8h 00m Hyper-Focused, Nov 12, 1)
 - Wednesday check-in with Integrator (30m Preparation, Wednesday, 1)
 - Client Services L10 (1h 00m Hyper-Focused, Wednesday)
 - Leadership L10 (1h 30m Hyper-Focused, Wednesday)
 - Operations L10
- Thursday (Performan... 10)**
 - PTO Request Dec 26, 29, 30 (Hyper-Focused, Sep 11, 1)
 - Schedule Review of Client Core Processes (Activation On Hold Hyper-Focused, Aug 15, 3)
 - Schedule Meetings with AE FND Executes re:Trust and Will (Off Track Hyper-Focused, Aug 13 - Today)
 - Thumbnail of a calendar or scheduling tool interface.
- Friday (Preparation: Im... 7)**
 - Angie Bong > Meeting with Angie Bong (Hyper-Focused, Tomorrow 10:00am, 1 8)
 - Annual: Marcus Fierek (Hyper-Focused, Sep 25, 2026, 2)
 - Review 5-Steps to Creating a Good ScoreCard (Preparation, Tomorrow)
 - HSA Employer Contributions for the Month (25m Preparation, Sep 17, 9)

KEY METRICS (WHAT TO SHOW?)

- Synergos Capacity Views
- Workload View
- CSDS Status Dashboard
- Client Happiness Dashboard

KEY METRICS EXAMPLE



LEARNING OUTCOMES

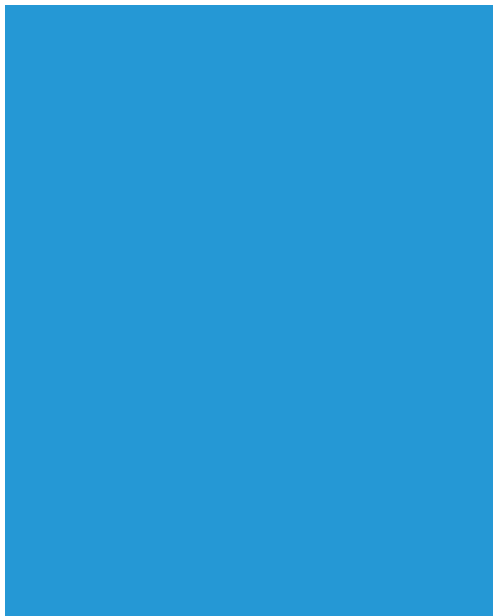
- This is the first sample bullet point.
- Here's the second sample bullet point.
- This is the third sample bullet point. It's much longer than the first and second ones.
- The fourth bullet point would go here.
- And, finally, the fifth bullet point.

THIS IS A SAMPLE SLIDE WITHOUT THE LOGO

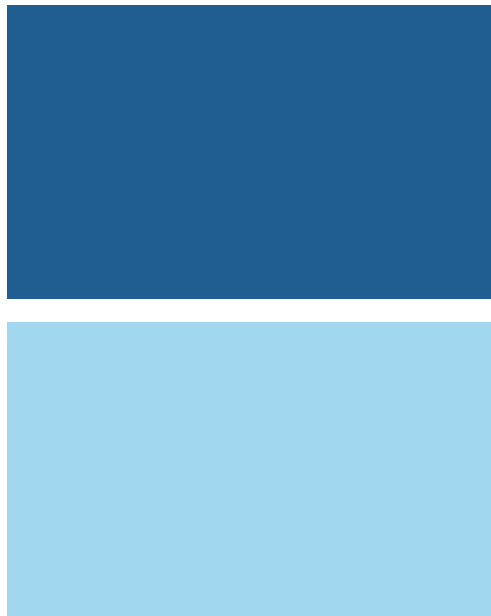
Multiple master layouts are available with the logo removed from the footer. Explore the Layout options labeled “No ogo.”

COLOR PALETTE

Primary



Secondary



Accent

