

Cutting-Edge Time Management: Using Adaptive Strategic Thinking to Optimize Your Time

Presented by David L. Lawrence, RFC[®], AIF[®]
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Outline of Session (55 minutes)

1. Introduction: Linear vs. Adaptive Strategic Thinking (AST)
2. The Value of effective Time Management
 - a. Costs vs. Benefits
 - b. Using AST: A Few real examples
3. Time Management
 - a. Five Myths of Time Management:
4. Clutter is a clue
5. Developing AST in the workplace
 - a. Management
 - b. Team dynamics
6. Interactive demonstration of AST
 - a. Attendees get to try it out
7. Advanced concepts in AST
8. Final Thoughts
 - a. Questions
 - b. Comments

Total Time: 55 minutes

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CEU approved: None

Speaker: David L. Lawrence

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Course Purpose/Learning Objectives

Adaptive Strategic Thinking (AST) involves a different decision dynamic with respect to issues such as time management. In AST, decisions might be made based on situational criteria, with multiple channels of support, avenues of solutions or choices to make. Any one of the choices made could potentially solve the problem at hand, the challenge is finding the most optimal approach or combination of approaches. Cause and effect still applies, but in a multi-dimensional decision hierarchy, the most optimal approach may involve situation specific decision parameters that utilize multiple resources and/or techniques.

The session reviews methodologies for improving the efficiency of practice operations through the use of Adaptive Strategic Thinking applied to time management of the owners and staff of a firm. This is an interactive session with audience participation in a fun and enlightening approach to learning.

David L. Lawrence, RFC[®], AIF[®]

David L. Lawrence, RFC[®], AIF[®], is President of EfficientPractice.com, a practice consulting firm based in San Diego, CA. Mr. Lawrence has more than 26 years of experience as a financial planner, consultant, public speaker and writer. He has been recognized by numerous organizations for his efforts, including The Internal Revenue Service, the Housing and Urban Development (HUD) Agencies, The Securities Industry and Financial Markets Association, The Financial Planning Association and the United Way. He is a frequent on-air commentator on financial topics with local Fox and NBC Television affiliates. And, Mr. Lawrence currently writes a monthly column for **Financial Advisor Magazine**.