



## Time Management Assessment

- Please ensure you can access the output from your time management assessment during this workshop (not GAMMA PI™); or
- If you did not complete the assessment, please do so now
  - Check your email account for the token by searching for: “Your Time Management Assessment Token”

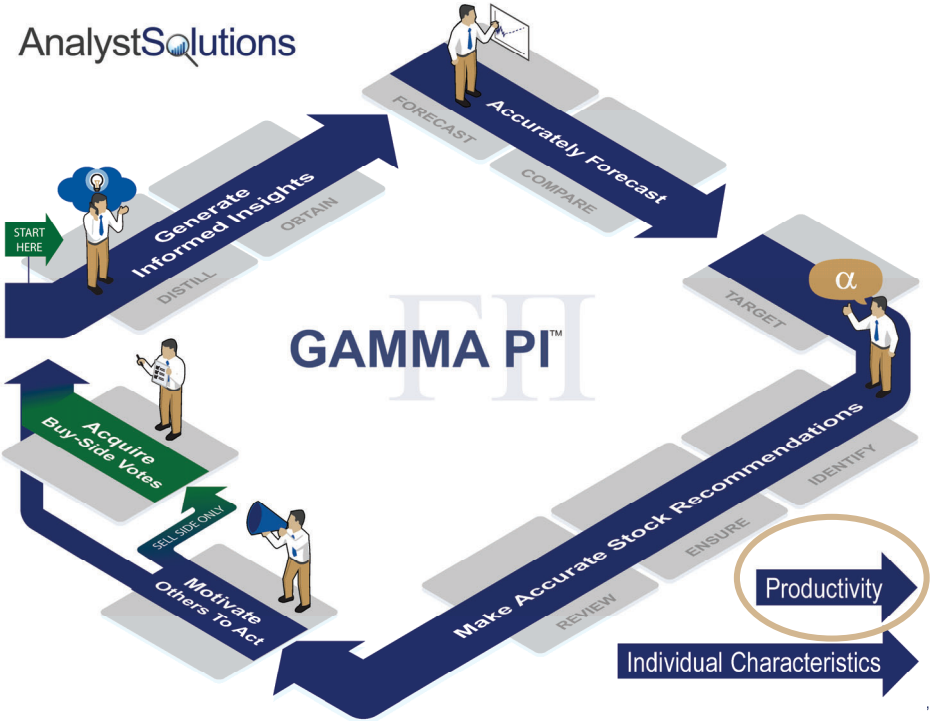
Go to: <https://www.analystsolutions.com/tm/>

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# Maximize Your Time for Alpha Generation

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CE Qualified Activity  CFA Institute



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# Drinking from Fire Hose

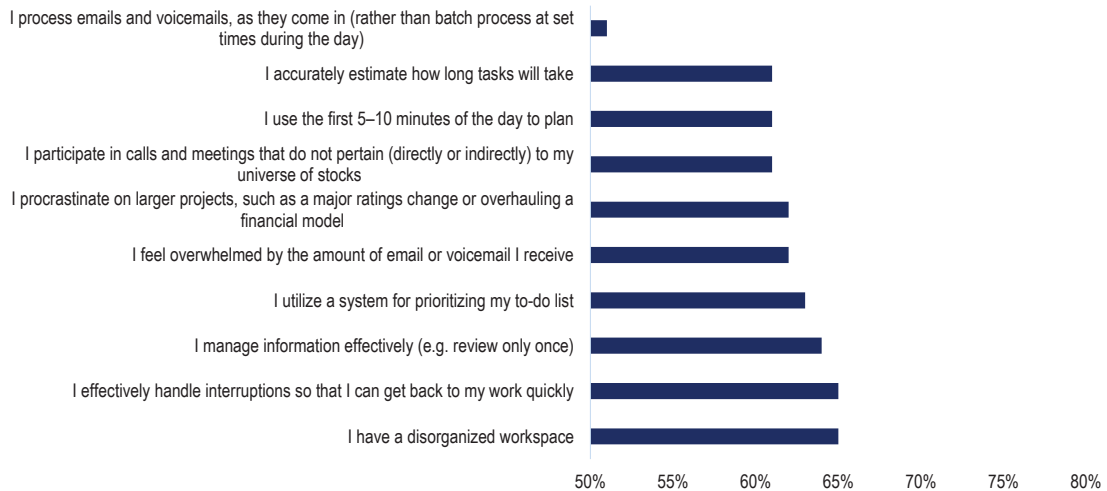


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## Survey Responses: Productivity



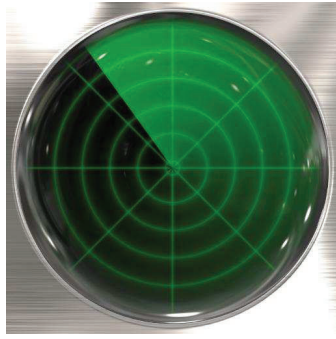
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# Workshop Flow

## 1. Assess where you are...



## 2. Create a pathway to your destination...



“Do I Need to Improve P, S or E?”

### “Do I Need to Improve P, S or E?” Exercise

Behaviors	Never	Rarely	Sometimes	Frequently	Always	
1 Accurately estimate how long tasks will take						S
2 Create an orderly workspace						E
3 Automate, delegate, or avoid low-value activities						E
4 Effectively handle interruptions						E



# Areas for Time-Management Self-Assessment



## Prioritization



## Scheduling



## Efficiency

## Score “Prioritization, Scheduling and Efficiency” Exercise



# Complete Your TAP

## Section 1

### Transformation Action Plan (TAP)



#### Instructions for the Transformation Action Plan (TAP):

- Throughout this workshop complete the TAP below
- Apply the key points after the workshop to help you improve your performance
- This will not be collected and so write in a manner that will help you utilize the concepts being learned

## Based on Our Observations, Poor Stock Picking Performance Is...



- Usually not due to:
  - Lack of motivation
  - Lack of intelligence
- Often the result of:
  - Ineffective time allocation

## Time Management Is Your Primary Weapon

- The 3 elements that can make a great analyst:
  - Superior intelligence
  - Superior firm resources
  - Superior work skills
- Which can you control?



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## What Would 10% More Time Mean to You?

**At least 5 extra hours per week could be used for...**

- Better identifying the critical factors most likely to move a stock
- Calling information sources about a critical factor
- Conveying your insights to those colleagues you need to influence



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Most analysts play *defense*...

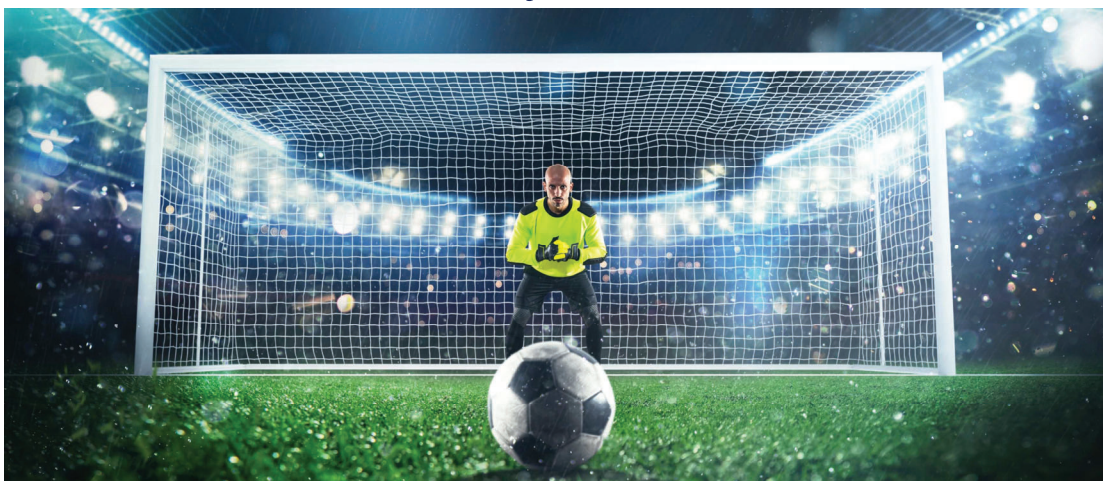


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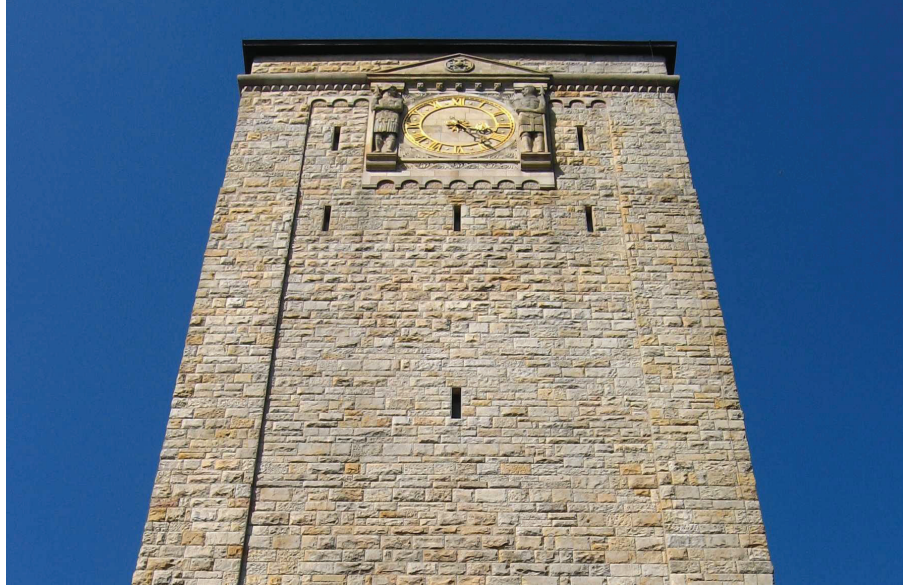
A goalie may play an important role but will rarely score



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## Buried in the Watch Tower

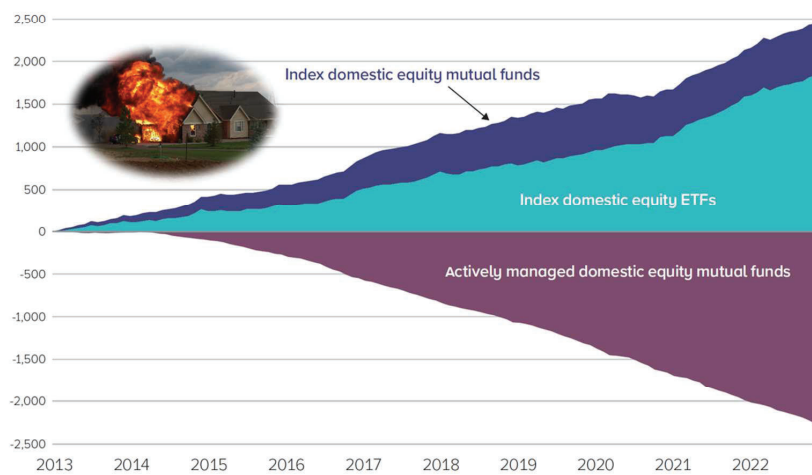
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## Worthy of Analysis

Cumulative flows to domestic equity mutual funds and net share issuance of index domestic equity ETFs, billions of dollars, monthly



Source: Investment Company Institute

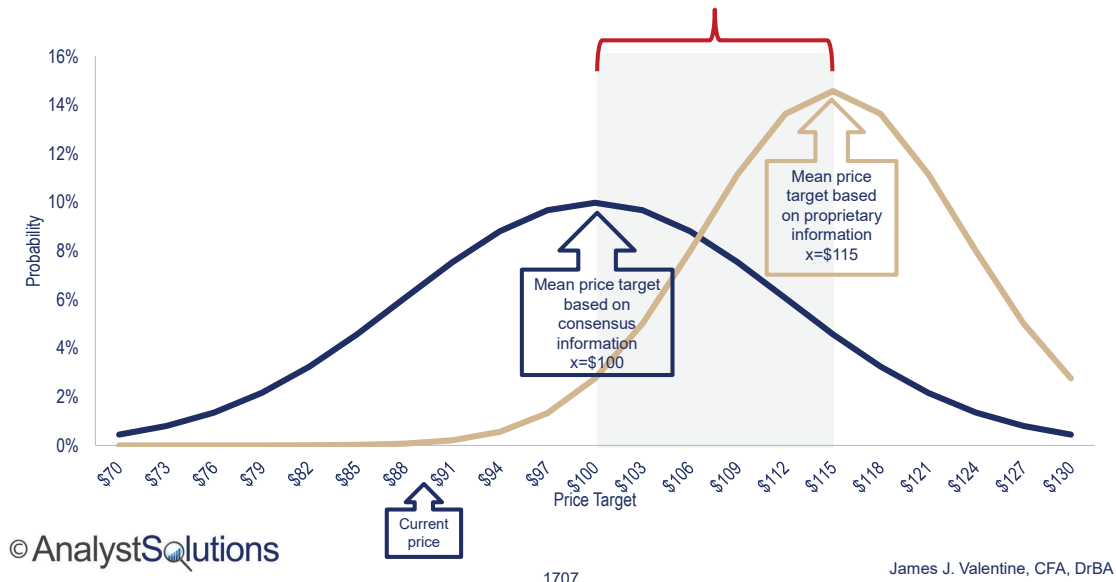
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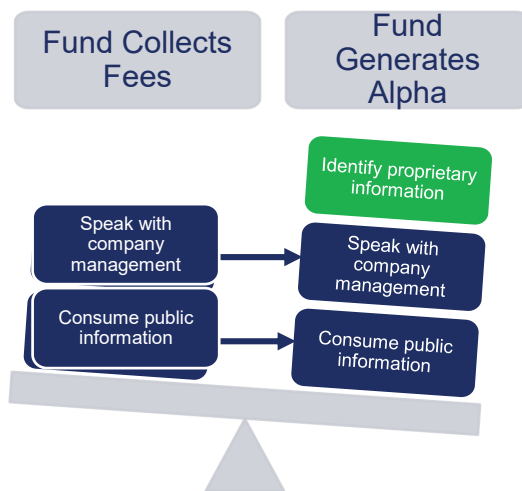
RLA9R8



# Information Asymmetry



# Information Asymmetry = Alpha



## Great Analysts Play Offense

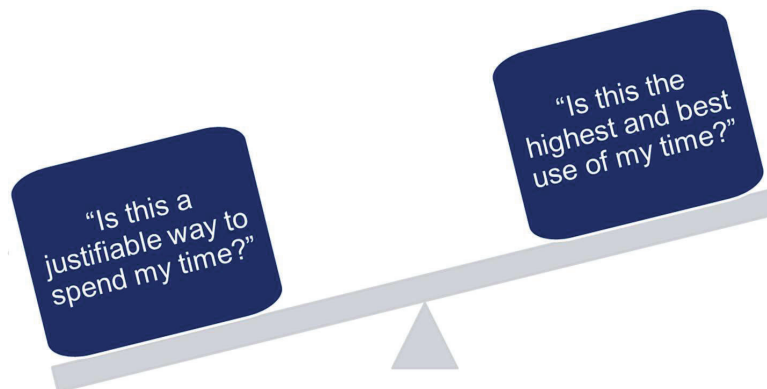


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## What Gets an Analyst Paid?



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# Exercise: Working Offensively vs. Defensively Case Study

Amit



Lucas



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## Prioritization



## Scheduling



## Efficiency

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# Challenge to Balance

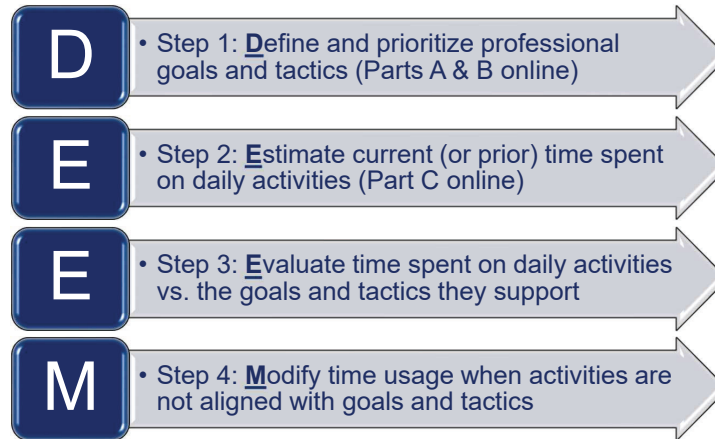
Likelihood activity will  
help achieve goal

=

Time dedicated  
to activity



# DEEM™ to Prioritize Your Time



Time Used On Any Activity Should Balance  
with the Goals It Achieves



# Primary Goals

**Generate Alpha or Help Clients  
Generate Alpha**



**Get Recognized for Your Efforts**

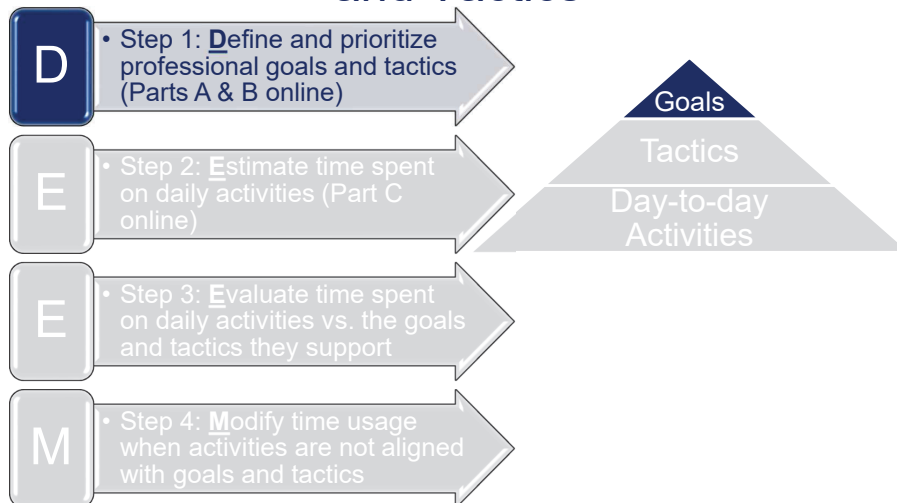


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## Step 1A: Define and Prioritize Professional Goals and Tactics

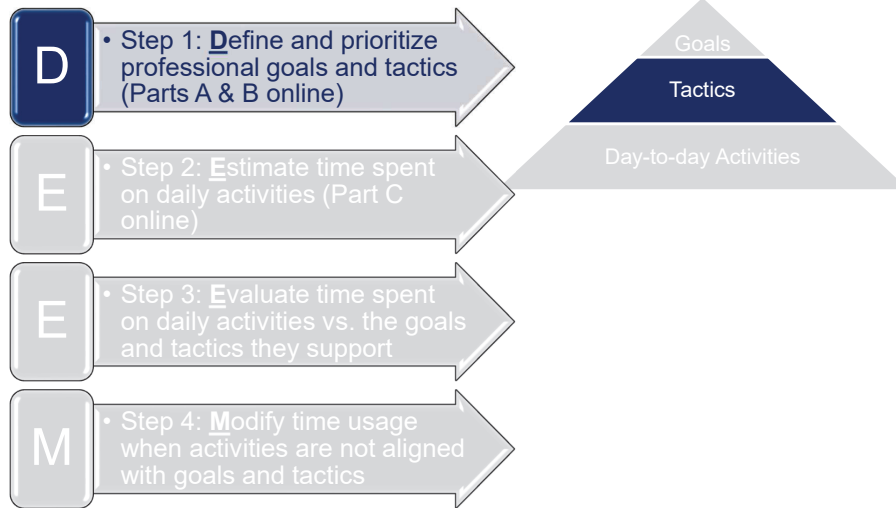


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# Step 1B: Define and Prioritize Professional Goals and Tactics



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## Part B, Item A



Part B: Are Your Activities Aligned with Your Tactics?

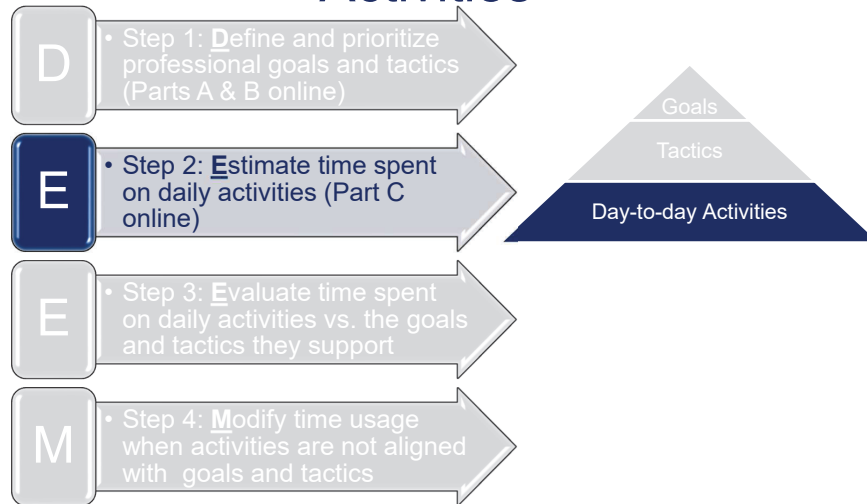
	Tactic Category	Your Initial Ranking (Item "A")	Item Priority Activity (I)
1. Distill macro, industry and company information to identify the most important critical factors for my assigned stocks	GI: Generate insights more accurate than consensus	10	
2. Build/contact network of informed/accurate information sources to identify/validate my out-of-consensus views for my critical factors	GI: Generate insights more accurate than consensus	10	
3. Generate a financial forecast(s) more accurate than consensus by using unique insights not held by consensus	FA: Forecast accurately	10	
4. Apply the most appropriate valuation method(s) and multiple(s) to create a price target(s) more accurate than consensus	VA: Value (stocks) accurately	9	

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## Step 2: Estimate Time Spent on Daily Activities



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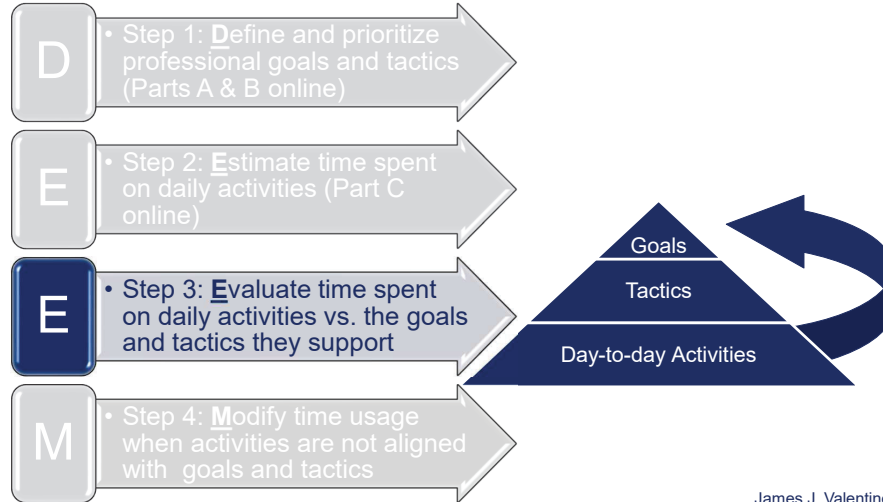
## Activities Are Categorized as a Means to Achieving a Tactic

**Tactic:**  
“Ensure I’m getting into or out of a stock at the ideal time (not early or late)”

Activities
Before making a major change in stock recommendations, setting aside time to assess market sentiment towards a stock
Researching elements of risk rather than just upside for my high-conviction stock calls
Reviewing my investment thesis with a colleague/committee before changing, in order to reduce my potential biases or blind spots
When making recommendations, verifying my forecasts and/or valuation multiples are accurate and justifiably out-of-consensus

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## Step 3: Evaluate Time Spent On Daily Activities vs. Goals And Tactics They Support



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## Part B: Item B & “Activity Score”

Part B: Are Your Activities Aligned with Your Tactics?

	Tactic Category	Your Initial Ranking (Item "A")	Ranking Based on Prioritizing Your Activities in the Recent Past (Item "B")	Activity Score: Ratio of Item B divided by Item A
1. Distill macro, industry and company information to identify the most important critical factors for my assigned stocks	GI: Generate insights more accurate than consensus	10	6.5	65.5%
2. Build/contact network of informed/accurate information sources to identify/validate my out-of-consensus views for my critical factors	GI: Generate insights more accurate than consensus	10	6.5	65.5%
3. Generate a financial forecast(s) more accurate than consensus by using unique insights not held by consensus	FA: Forecast accurately	10	5.3	52.5%
4. Apply the most appropriate valuation method(s) and multiple(s) to create a price target(s) more accurate than consensus	VA: Value (stocks) accurately	9	8.5	94.4%

## “WOT?” or “Value Add?”

- At the request of others, participating in activities that do not support my professional tactics
- Fine tuning my financial forecasts based on new public information
- Initiating non-work activities during business hours (e.g., looking up sports scores, personal discussion conversation, etc.)
- Participating in widely-publicized conference calls/meetings/field trips arranged by others (e.g., quarterly conference calls)
- Reading company regulatory filings/press releases to get a general understanding of the company and its performance
- Reviewing emails and voicemails coming from anyone who is not one of my trusted information sources
- Reviewing news or other widely disseminated, publicly-available data

## Do You Need to Reprioritize?

### Review column “Future Priority Minus Past Priority”

- Positive scores are those that you want to increase
- Where will you find the time?
- Negative scores are those you want to reduce



# Part C

## Part C: Do You Need to Re-Prioritize How You Spend Your Professional Time?

Activity	Tactic Category	Past Priority	Future Priority	Future Priority Minus Past Priority
1. Validating my out-of-consensus financial forecasts with informed non-biased information sources	FA	3	7	4
2. Conducting scenario analysis to stress-test my financial forecasts	FA	2	6	4
3. Meeting privately one-on-one with company management	GI	3	7	4
4. Reviewing my investment thesis with a				
32. Reading publically-available information, seeking specific insights that pertain to a critical factor that is not understood by consensus	GI	9	7	-2
33. Accepting an inbound call/meeting from a sell-side analyst who has NOT helped in generating alpha in the past	WOT	9	7	-2
34. Reviewing emails and voicemails coming from anyone who is not one of my trusted information sources	WOT	6	3	-3
35. Reading sell-side research in response to something that did not change consensus expectations for one of the companies in my universe	WOT	9	6	-3

## Squandered Time

Activity that simply gets you to the same place as consensus

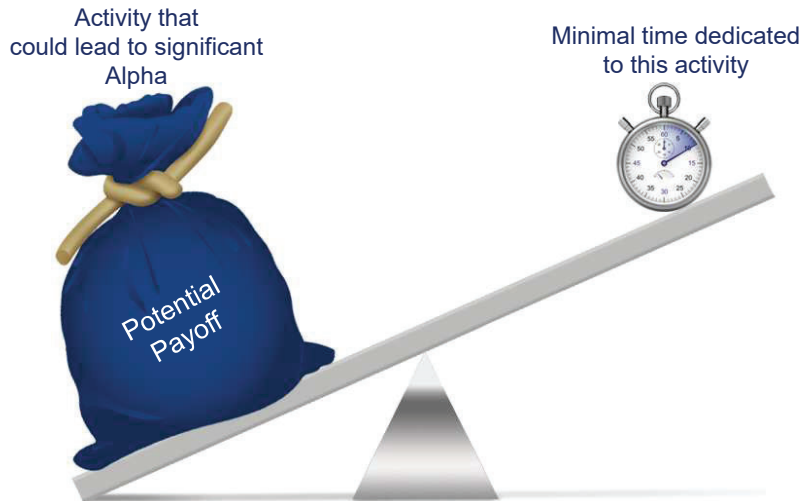


Significant time dedicated to this activity





# Missed Opportunity



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## Activities that generate alpha deserve the most time and attention

- Go beyond the financial media by reviewing industry journals, websites, and blogs for new information sources
- Proactively conduct primary research:
  - Call/email unique information sources
  - Conduct surveys
  - Conduct field research (e.g., attend conferences that pertain to critical factors)
- Analyze data in a unique manner (upstream/downstream from your company's critical factors)
- Forecast financials based on proprietary insights
- When reviewing regulatory filings focus only on areas that impact critical factors
- Buy-side: contact the most knowledgeable sell-side for updates regarding critical factors



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# Complete Your TAP

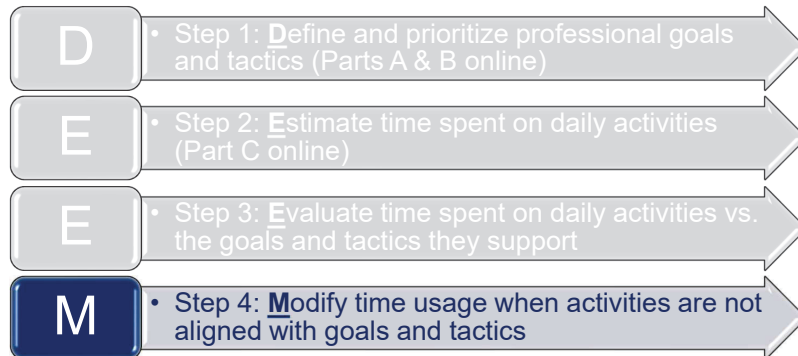
## Section 2

### Transformation Action Plan (TAP)



Instructions for the Transformation Action Plan (TAP):

- Throughout this workshop complete the TAP below
- Apply the key points after the workshop to help you improve your



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## EPIC™ Stock Calls Require Critical Factors Meet All Four Criteria

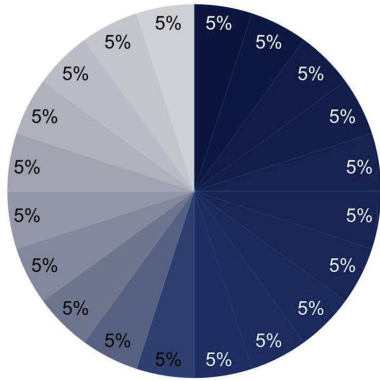


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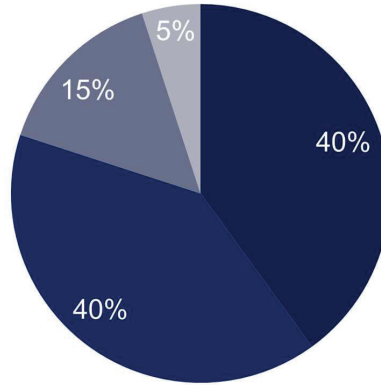
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# What Will Your Day Look Like?

Critical Factors Not Defined



Critical Factors Defined



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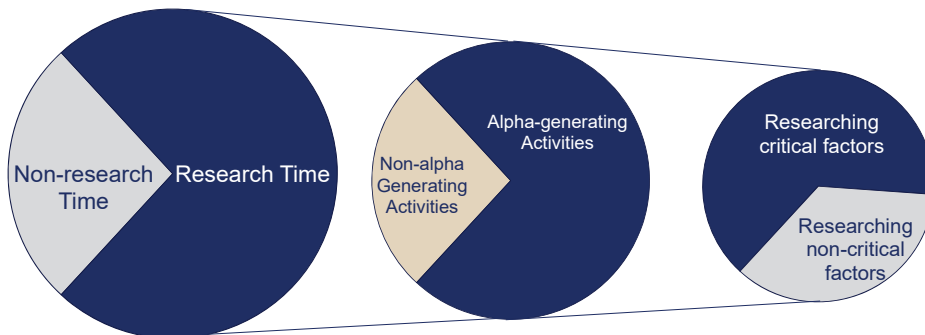
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# Make the Alpha-Generating Time Matter

Total Work Time

Research Time

Alpha-Generating Activities

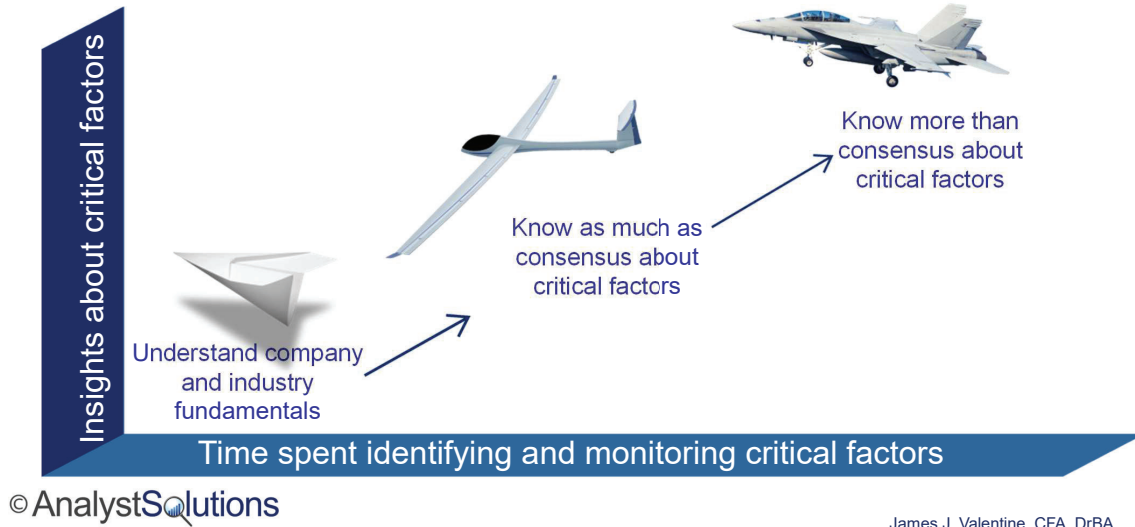


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# Levels of Knowledge



# Are Your 3 Levels Aligned?



# Can You Tell if You're Aligned?

## Perfect Alignment



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## Not Aligned



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## “Wall of Worry”



- Procrastination may be eliminated by confronting negative, often unobserved beliefs
- If this impacts you, Google “Evidence-based methods to reduce procrastination” and focus on those backed by peer-reviewed research

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# Prioritization Is About...

...Starting



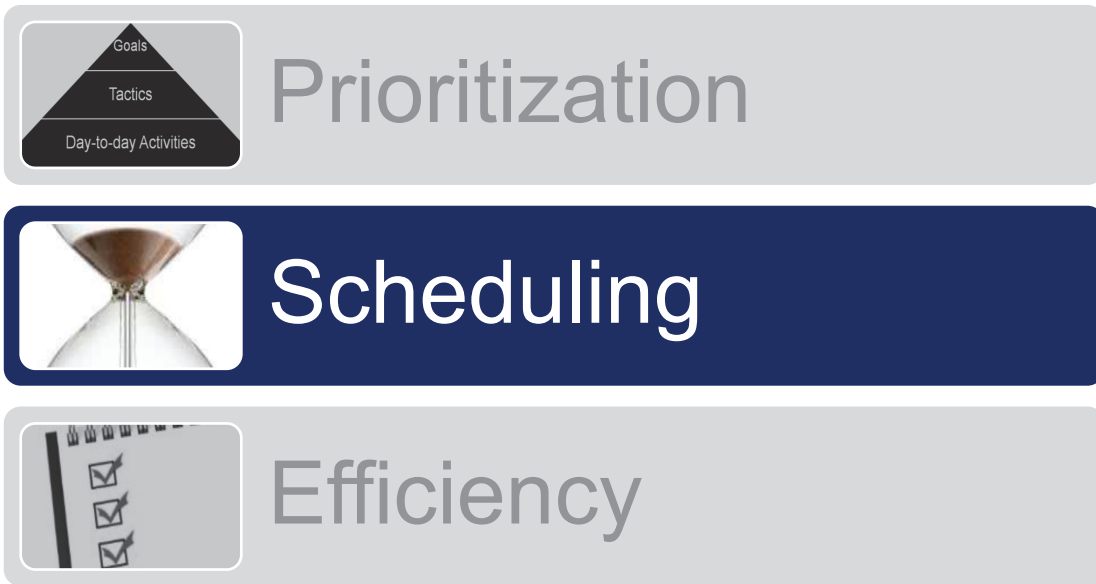
...Stopping



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Every choice  
is a trade-  
off...

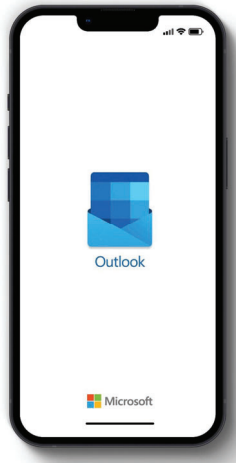


...and you  
ultimately  
determine where  
the sand falls

### Analyst Solutions Time Management Matrix

		Generates Differentiated Insights Useful for Stock Picking	
		LOW	HIGH
Initiating vs. Responding	You INITIATE (Offense)	“Enabler” for Alpha  Read portions of regulatory filing that pertain to critical factors and their catalysts	Generate Alpha  Make 10 outgoing calls in one day to discuss assumptions for critical factors with proprietary sources of information
	You RESPOND (Defense)	IR contact from company you don't cover calls to tell you about an issue that has no importance to your assigned coverage  Waste of Time?	Accept a last-minute one-on-one with management at investor conference  Surprise Find

# Evaluate Your Professional Calendar Exercise



		Activity Generates Differentiated Insights Useful for Stock Picking	
		LOW	HIGH
Initiating vs. Responding	YOU INITIATE (Offense)	"Enabler" for Alpha	Generate Alpha
	YOU RESPOND (Defense)		
		Waste of Time?	Surprise Find

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# Getting Things Done Weekly Review

**GTD WEEKLY REVIEW™** **gtd**

**GET CLEAR**

**COLLECT LOOSE PAPERS AND MATERIALS**  
Gather all accumulated business cards, receipts, and miscellaneous paper-based materials into your in-tray.

**GET "IN" TO ZERO**  
Process completely all outstanding paper materials, journal and meeting notes, voicemails, dictation, and emails.

**EMPTY YOUR HEAD**  
Put in writing and process any uncaptured new projects, action items, waiting fors, someday/maybe, etc.

**GET CURRENT**

**REVIEW NEXT ACTIONS LISTS**  
Mark off completed actions. Review for reminders of further action steps to record.

**REVIEW PREVIOUS CALENDAR DATA**  
Review past calendar in detail for remaining action items, reference data, etc., and transfer into the active system.

**REVIEW UPCOMING CALENDAR**  
Review upcoming calendar events—long and short term. Capture actions triggered.

**REVIEW WAITING FOR LIST**  
Record appropriate actions for any needed follow-up. Check off received ones.

**REVIEW PROJECT (AND LARGER OUTCOME) LISTS**  
Evaluate status of projects, goals, and outcomes, one by one, ensuring at least one current next action item on each. Browse through project plans, support material, and any other work-in-progress material to trigger new actions, completions, waiting fors, etc.

**REVIEW ANY RELEVANT CHECKLISTS**  
Use as a trigger for any new actions.

**GET CREATIVE**

**REVIEW SOMEDAY/MAYBE LIST**  
Review for any projects or actions which may now have become active, and transfer to the appropriate list. Delete items no longer of interest.

**BE CREATIVE & COURAGEOUS**  
Any new, wonderful, hare-brained, creative, thought-provoking, risk-taking ideas to add into your system?

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## Implement Best Practices for Scheduling: Planning

Schedule 10-15 minutes each week for planning:

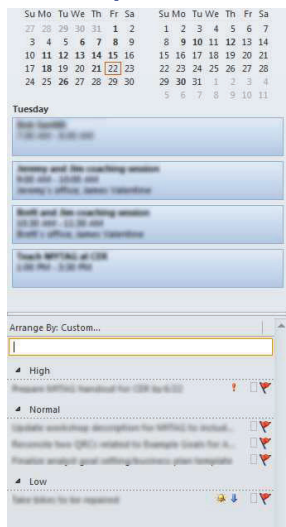
1. Review & block out time for appointments that lead to alpha generation
2. Reflect on this: “What unique insights were found this past week?”
3. If none (or few)....



## Block out time for value-added research



## Implement Best Practices for Scheduling: To-Do Lists



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- Record to-do items in one reliable location (never keep more than one to-do list)
  - Accessible 24x7 from any location
  - Syncs between smart phone, work and home computing devices (e.g. Outlook's tasks, Google's tasks, Apple's reminders)
- Find a format that works for you and that allows for flexibility (Getting Things Done, "GTD" and FranklinCovey have two of the more highly-rated options)
- Prioritize tasks to ensure important ones get done first
- Break down large tasks into pieces
- Schedule for long term and short term
- Overestimate how long tasks will take
- Avoid over-booking to allow for interruptions and unexpected urgencies
- Build in breaks for yourself
- Be ready to "let it go" if necessary; not all days will go according to plan

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## Implement Best Practices for Scheduling: Saying "No"

**Say "No" (politely) when:**



- Meetings are ineffective or unnecessary
- New projects are misaligned with goals or resources
- Tasks are a waste of time; look for alternative actions
- You are not the right person for the task
- You need to focus

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# Leverage Your Travel Time



- Once you understand your companies, attend only the portion(s) of events likely to help identify or understand the critical factors
- Leverage time on a trip by accomplishing more than one goal
- Commuting and travel time can comprise 20% of the work week
  - Leverage technology and plan ahead to use time out of the office wisely
  - Do more than just read the financial press

# Best Practices for Scheduling

## Quick Reference Card (QRC)

Best Practices for Scheduling

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# Complete Your TAP

## Section 3

### Transformation Action Plan (TAP)



**Instructions for the Transformation Action Plan (TAP):**

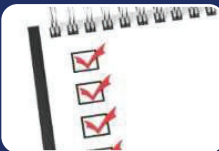
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- This will not be collected and so write in a manner that will help you utilize the concepts being learned



## Prioritization



## Scheduling



## Efficiency

# Interruptions Self-Assessment

It looks like this...

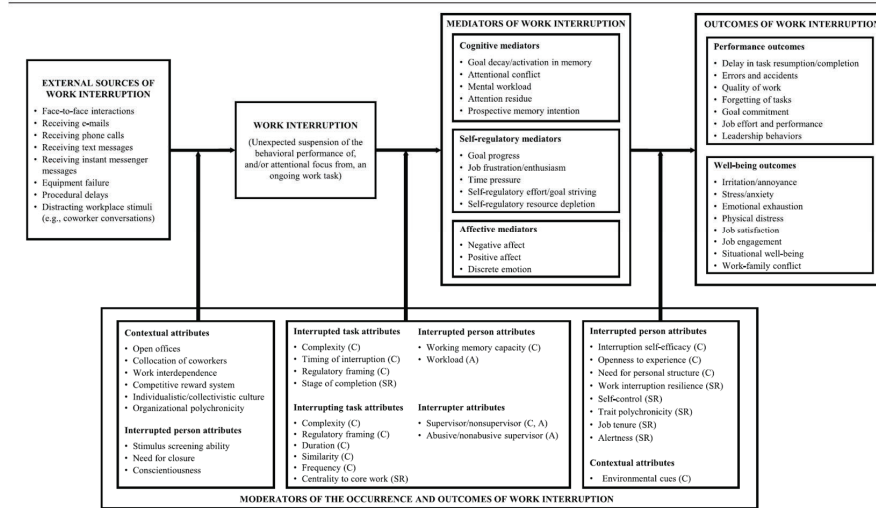
Distraction Behaviors	Letter	Rarely	To some extent	For the most part	To a great extent
<b>When handling interruptions, I...</b>					
1. Specify a time to get back to the interrupter					
2. Remove myself from the distracting environment					
3. Notify others when I cannot be disturbed					

## Score and Debrief Interruptions Self-Assessment



# Causes and Consequences of Interruptions

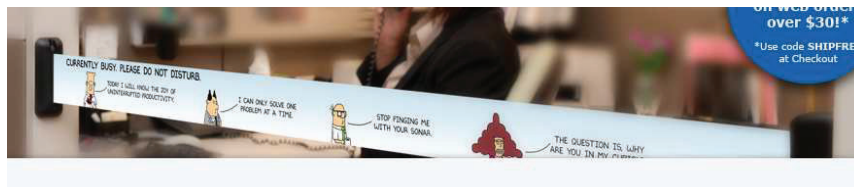
Figure 1  
Integrative Process-Based Model of Sources, Mediators, Outcomes, and Moderators of Work Interruptions



Puranik, H., Koopman, J., & Vough, H. C. (2020). Pardon the Interruption: An Integrative Review and Future Research Agenda for Research on Work Interruptions. *Journal of Management*, 46(6), 806–842. <https://doi.org/10.1177/0149206319887423> James J. Valentine, CFA, DrBA

## The Dark Side of Interruptions

- 2.1 hours per day
- Error rates double
- 25-40 minutes to regain focus



## See QRC for Details

- Play Offense, Not Defense
- Treat Your Research Time Preciously
- Covet Your Space
- Manage Internal Colleagues

## Quick Reference Card (QRC)

Best Practices for Preventing and Minimizing Disruptions

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## Speed Up Recordings

Most digital audio can be played faster than 1x speed

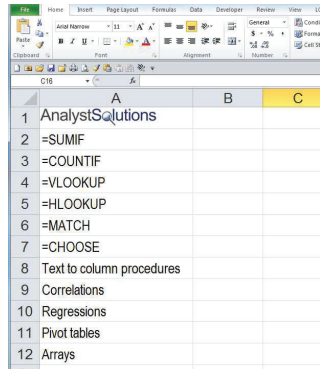
- Browser Add-ins
- Microsoft player
- YouTube



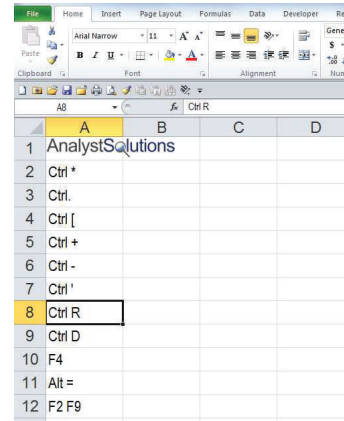


# Master Excel

## 42 Key Features



## Useful Keyboard Shortcuts

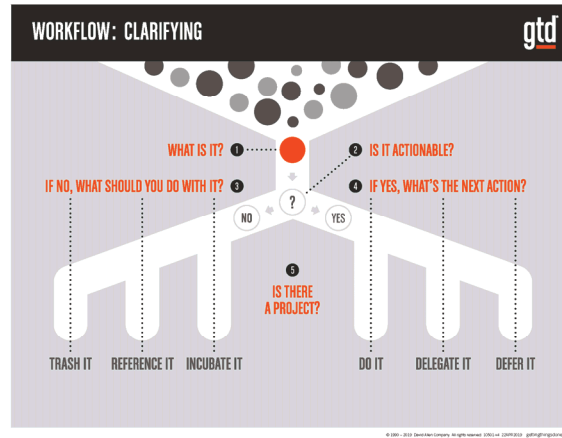


## Best Practices for E-mail Productivity (1 of 2)

- Minimize the distraction of a pop-up box by shutting it off or setting it to check every hour.
- Designate blocks of time in your schedule to check email; start with 3–4 times a day and gradually reduce it to 2–3 times.
- Sort incoming messages by author to process related email together
- Unsubscribe or remove your email address from unwanted or unread mailings and text/chat groups.
  - Stay on top of it by removing the first instance of spam (waiting won't save you time)
  - When returning from vacation, sort all email by sender or subject line to quickly find the worst spammers (who's filling your inbox over the course of a week?)
- Try to read emails/messages only once -- take action before moving on:
  - Delete it; or
  - File it; or
  - Reply/act



# Getting Things Done Workflow



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## Best Practices for E-mail Productivity (2 of 2)

- Turn emails into calendar appointments or tasks; avoid using your Inbox as a “to-do” list.
- Write less text; keep messages short and to the point.
- Use rules to automatically send certain messages into designated folders.
- Complete the “TO” and the “SUBJECT” lines last. When appropriate, the subject line should have a call to action to catch attention and for ease of filing.
- Use templates for repetitive messages.
- Use “Out of office” auto-responder to avoid being distracted from email when conducting off-site research

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# SAVING EMAILS AS TASKS, CALENDAR ITEMS AND ONENOTE ENTRIES

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## Parkinson's Law



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# QRC: Best Practices for Setting Time Limits

## Quick Reference Card (QRC) Best Practices for Setting Time Limits

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## Complete Your TAP

### Section 4

#### Transformation Action Plan (TAP)

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**Instructions for the Transformation Action Plan (TAP):**

- Throughout this workshop complete the TAP below
  - Apply the key points after the workshop to help you improve your performance
  - This will not be collected and so write in a manner that will help you utilize the concepts being learned
-

# BEST PRACTICES FOR AUTOMATING, DELEGATING, AND OUTSOURCING

## Automate, Delegate or Outsource Exercise

It looks like this...



**Instructions for the "Automate, Delegate, or Outsource Low-Valued Activities" Exercise:**

- For each of the activities below, decide whether to:
  - Delegate
  - Automate
  - Outsource; or
  - Complete on your own
- Assume that you have resources to help you with these activities, such as a capable internal associate who understands finance or an outside vendor who is capable of completing basic financial analysis.
- Place a check mark in the box that represents the best course of action.

Activity	Delegate	Automate	Outsource	Self
Update earnings model within 10 minutes of a company reporting earnings				
Update the balance sheet in an earnings model with information only available from the quarterly regulatory filing				

# QRC: Assessing When to Automate, Delegate or Outsource

## Quick Reference Card (QRC)

Assessing When to Automate, Delegate, or Outsource

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# QRC: Best Practices for Delegating

## Quick Reference Card (QRC)

Best Practices for Delegating

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# Complete Your TAP

## Section 5

### Transformation Action Plan (TAP)

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**Instructions for the Transformation Action Plan (TAP):**

- Throughout this workshop complete the TAP below
  - Apply the key points after the workshop to help you improve your performance
  - This will not be collected and so write in a manner that will help you utilize the concepts being learned
- 

## REINFORCE BEST PRACTICES

# Do We Deliver On Our Commitments?

## What We Tell Our Clients...

- “We like to say that investment research is in our DNA”
- “Research is not simply a priority for us, it is part of what defines us and distinguishes our firm”
- “The investment team uses a bottom-up research process to identify companies that, among other things, sell at a discount to their intrinsic value”

## What Analysts Tell Me...

- “I cover too many stocks to come up with anything new”
- “There are too many demands on my time to come up with unique insights”
- “I’m spending too much time marketing to clients to do decent research”

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## Breadth and Depth of Your Universe Matters



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# Avoid Burnout

Endurance & success...



...or burn-out?



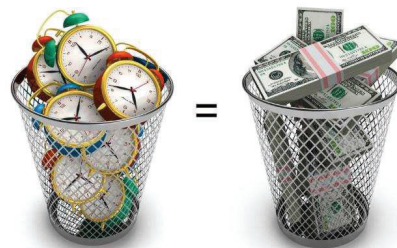
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## Are You Throwing Away Money?

- Wasting just 30 minutes of a typical 10-hour day, amounts to a loss of \$5,000 per year for every \$100K of annual income
- What would you do with an extra \$5,000 a year?



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# What Are You Going to Do With Your Extra Time?

At least 5 extra hours per week could be used for...

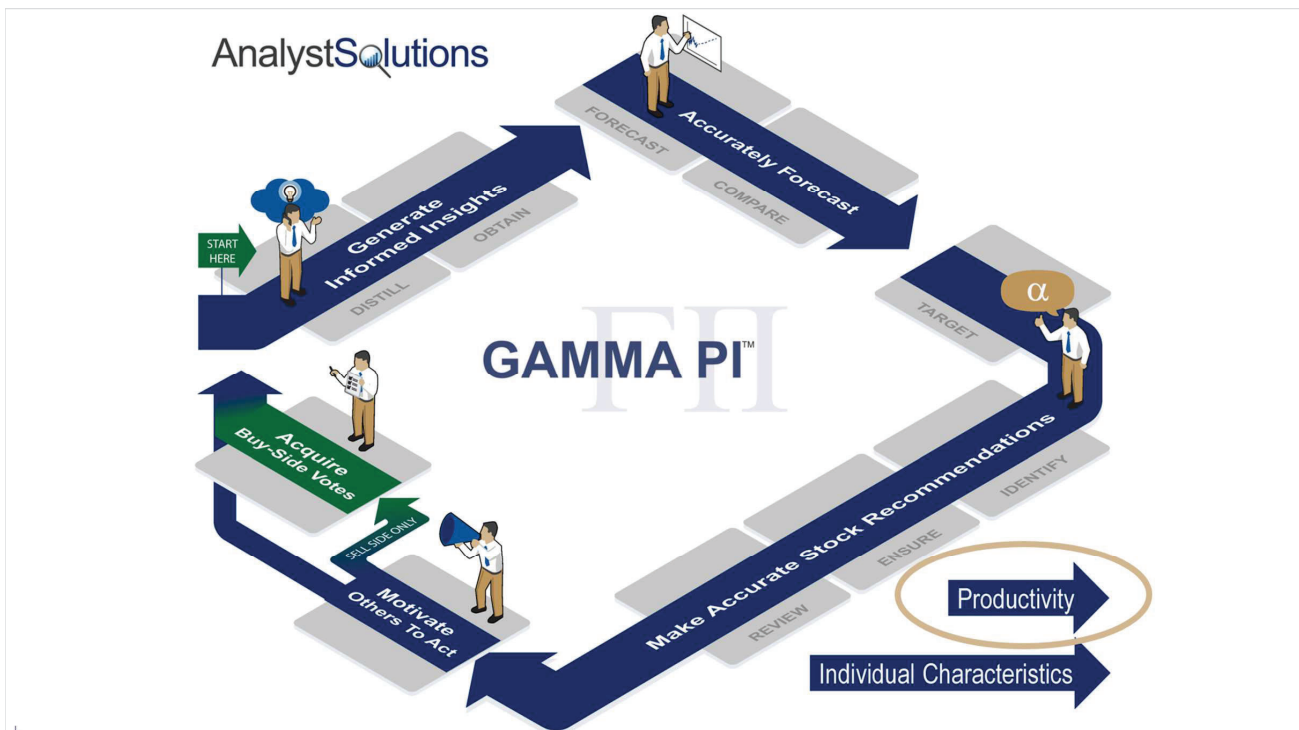
- Better identifying the critical factors most likely to move a stock
- Calling information sources about a critical factor
- Conveying your insights to those colleagues you need to influence



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Follow through by continually practicing these three steps...



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QRC: Best Practices for  
Time Management

# Quick Reference Card (QRC)

Best Practices for Time Management

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# Best Practices for Playing Offense

- **Maximize offensively-focused activities** where proprietary insights are most likely to be found. Examples include:
  - Making outgoing phone calls to information sources who offer insights that improve forecast of critical factors
  - Participating in private or small group meetings with industry expert(s) or company management
  - Attending an industry conference where few financial analysts are in attendance
  - Review only what's changed (e.g. Bloomberg's Redline and FactSet's Blackline for quarterly reports)
- **Stop or minimize defensively-focused activities** such as those that may provide background but not alpha-generating insights. Examples include:
  - Quarterly earnings conference calls (reading the transcript can be done in half the time as listening to the call)
  - Reading regulatory filings (use services that highlight the information that has changed from the prior filing)
  - Sell-side-sponsored investor conferences (only attend if one-on-ones are available)
  - Site tour, especially when no senior management are present (if the tour doesn't cover a potential critical factor, spend time elsewhere)
- Participate in calls/meetings only when they directly pertain to your universe of stocks
- **Hold a weekly meeting with yourself** to evaluate the prior and upcoming weeks to ask "Am I filling my calendar with "offense" activities (those that help generate more stock ideas) and eliminating "defense" activities?"

# Best Practices for Working Efficiently

- **Batch process emails** and return phone calls during 2-4 pre-blocked times each day
- Handle information only once (don't keep an email in your in-box for future reference)
  - Immediately convert all emails into tasks, calendar events or OneNote entries
  - Leave the office each day with an empty in-box
- **Schedule your week in advance**, noting important tasks and use the first 5–10 minutes of the day to plan
- **Set time limits** (mentally or in a calendar) before starting calls, meetings or tasks (and stick to the time limit)
- **Actively utilize a to-do list** that allows for prioritization and is accessible 24x7, including from mobile devices
- Utilize a note-taking system that can be quickly searched and cross referenced (e.g. OneNote or Evernote)
- Continually fine tune news filters (reduce the noise and increase critical factor insights)
- Learn Excel short-cuts if utilizing spreadsheets extensively
- When traveling, use time for research beyond reading the news or consuming publicly-available information
- Read transcripts rather than listen (or listen post call at 2x the speed)
- When possible, automate, delegate or outsource lower-valued activities that occur regularly

# Best Practices for Reducing Distractions

- **Shut off all pop-up boxes** (instant messaging, email, news and price alerts)
- Phone:
  - **Pre-screen all incoming calls**
  - Put phone in do-not-disturb mode when conducting research
- Wear a LARGE headset when working (at home and the office)
- **Say “no” to others** when
  - Meetings are ineffective or unnecessary
  - You are not the right person for the task
  - You need to focus on higher-priority tasks for the firm
- Immediately unsubscribe from all unwanted email distribution lists
- Tell those who interrupt you that you need to get on to a call
- Stand up when someone enters your office
- Put books or papers on your chairs to dissuade others from sitting

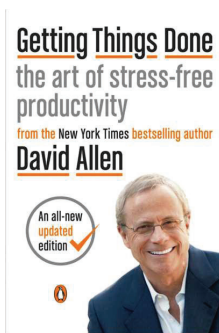
## Other Resources

1. Getting Things Done (GTD) by David Allen
2. The Pomodoro Technique by Francesco Cirillo
3. The Eisenhower Matrix by Dwight Eisenhower
4. Time Blocking by Laura Vanderkam
5. The 4-Hour Work Week by Tim Ferriss

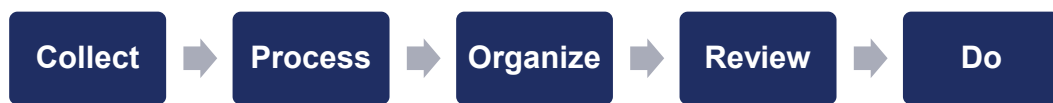
LinkedIn Learning search results for "time management". The interface includes a search bar with "time management" entered, a "Browse" button, and filters for "English", "Type", "Content by", and "Time to Complete". Below the search bar, it displays "5,177 Results for 'time management'".

Udemy search results for "time management". The interface includes a search bar with "time management" entered and a "Categories" button. Below the search bar, it displays "10,000 results for 'time management'". A link to "Explore Time Management courses" is provided, along with a note: "Students also learn Personal Productivity, Management Skills, Goal Setting, Lea".

## David Allen's Best Practices



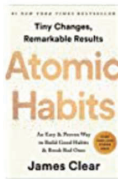
CATEGORY ARCHIVES:  
PODCASTS



## Key Take-aways from GTD

- Mind like water: instead of allowing future tasks to occupy your head, write them down physically or digitally. This clears the mind for creativity and prevents procrastination by taking action when something is assigned or needs to get done.
- Be deliberate in utilizing robust organization systems:
  - To-do-list or reminder (prioritizing)
  - Calendar/schedule
  - Email folders
  - Use the five phases of project planning / plan ahead / breaking tasks down into smaller pieces or labeling tasks as easy, intermediate, and hard
- 2-minute rule
- Avoid reading the same email/message twice: decide where it goes immediately
- Attack empty spaces of time. Fit something into those small spaces of empty time that would otherwise go unused

## Other Resources



**Atomic Habits: An Easy & Proven Way to Build Good Habits & Break Bad Ones**  
by James Clear (Hardcover)  
★★★★★ ~ 87,969  
\$11.98 ✓prime FREE One-Day  
129 Used & New from \$8.97



**Flow: The Psychology of Optimal Experience**  
(Harper Perennial Modern Classics)  
by Mihaly Csikszentmihalyi (Paperback)  
★★★★★ ~ 4,430  
\$9.69 ✓prime FREE One-Day  
143 Used & New from \$2.13



**Building a Second Brain: A Proven Method to Organize Your Digital Life and Unlock Your Creative Potential**  
by Tiago Forte (Hardcover)  
★★★★★ ~ 1,953  
\$18.60 ✓prime FREE One-Day  
52 Used & New from \$7.73



**How to Take Smart Notes: One Simple Technique to Boost Writing, Learning and Thinking**  
by Sönke Ahrens (Kindle Edition)  
★★★★★ ~ 481  
\$9.99

## Recap

- Use our strategies for:
  - Prioritizing
  - Scheduling
  - Working Efficiently
- Use DEEM™ to Prioritize:
  - Alpha-generating on top
  - Drop low-valued activities
- Set time limits
- Plan your week in advance
- Proactively reduce interruptions
- Delegate, automate, or outsource low-value activities
- And most importantly...



# How Will You Play the Game?

**Defense?**



**Offense?**

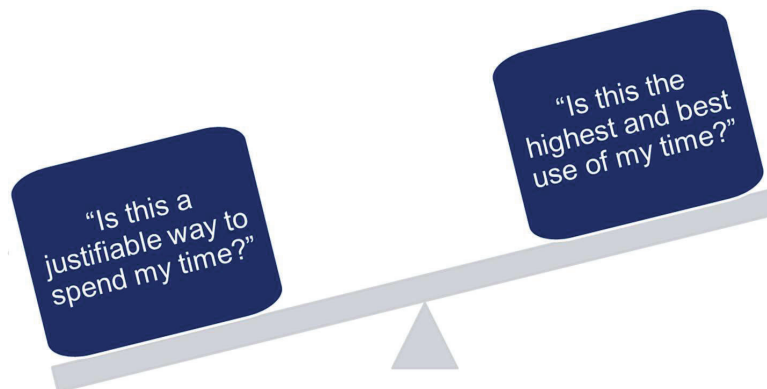


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# What Gets an Analyst Paid?



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# Maximizing Your Time for Alpha Generation Creates More Resources Than Your Competitors



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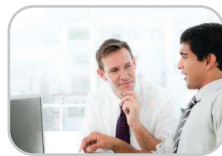
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## Our Tools



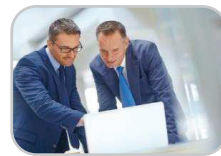
Workshops



One-on-one coaching



Assessments



Consulting



Keynote/offsite presentations

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# Workshops that Address Universal Analysts' Needs

-  **CRITICAL FACTORS** Identify & Monitor a Stock's Critical Factors
-  Generate Differentiated Insights Through Better Discovery, Questioning and Influencing
-  Apply Practical Valuation Techniques For More Accurate Price Targets
-  Master the Stock Call Techniques of Highly Experienced Analysts
-  Communicate Unique Stock Calls Successfully So Others Take Action
-  Maximize Your Time for Alpha Generation
-  Develop and Deploy a Marketing Strategy that Maximizes Wallet-Share

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## Best Practices Bulletins

### 10 Steps for Equity Research Analysts to Perform Better



According to Reuters, one of its sister companies, Lipper, finds that roughly 85% of active large-cap stock funds are lagging their benchmarks year-to-date through late November. Investors are voting with their feet as shown by the \$206 billion of inflows into ETFs through the first 10 months of 2014 vs. only \$36 billion for the...

### Portfolio Managers' #1 Frustration With Equity Research Analysts



While I was studying the Japanese language during college, I initially didn't take notice that the word "chigau" (ちがう) is used to convey both "different" and "wrong." But after moving to Tokyo and learning the importance of conforming to the group, I developed a newfound appreciation for why these two English words require only one...

[Read the Entire Bulletin >](#)

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# Thank You for Participating!



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- If you have questions, email us: [Info@AnalystSolutions.com](mailto:Info@AnalystSolutions.com)

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