



Capacity Management is for the Brave





Your hosts



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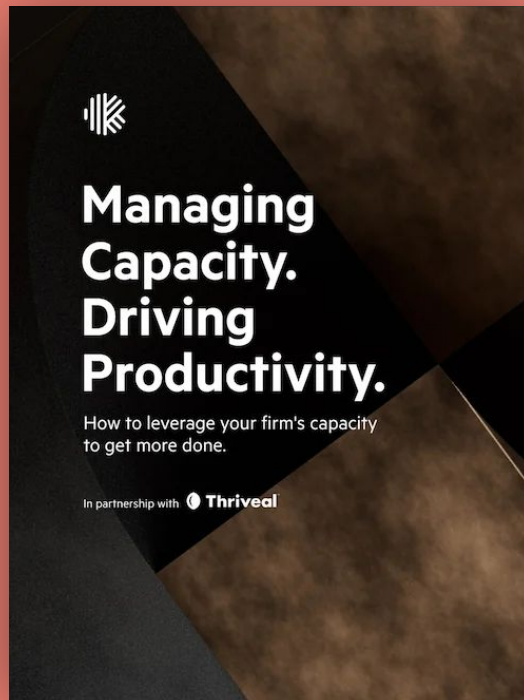


CAPACITY EBOOK

Managing Capacity. Driving Productivity.

Discover how to protect and leverage your firm's capacity to get more done and accelerate your firm's growth.

Download your copy now.





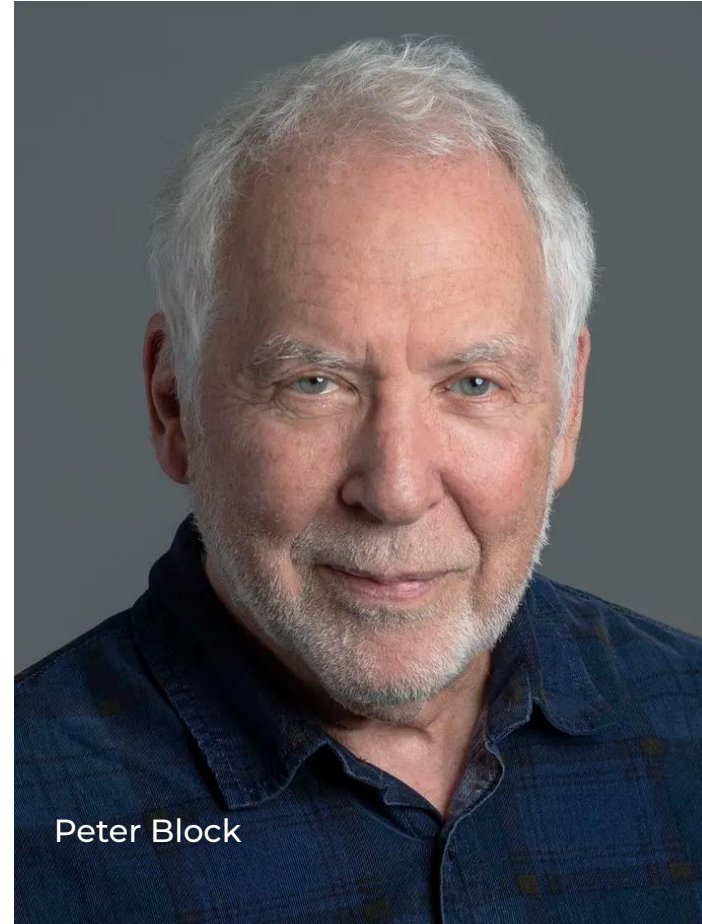
The most remarkable quote for leaders

“...perhaps the real task of leadership is to confront people with their freedom. This may be the ultimate act of love that is called for from those who hold power over others.

Choosing freedom is also the source of our willingness to choose to be accountable. The insight is that freedom is what creates accountability.

Freedom is not an escape from accountability, as the popular culture so often misunderstands. Our willingness to care for the well-being of the whole occurs when we are confronted with our freedom, and when we choose to accept and act on that freedom.”

Community: The Structure of Belonging



Peter Block



Agenda

- What are leaders called to do when leading others?
- The basics & benefits of planning
- Being brave about your planned capacity will affect others
- Q&A





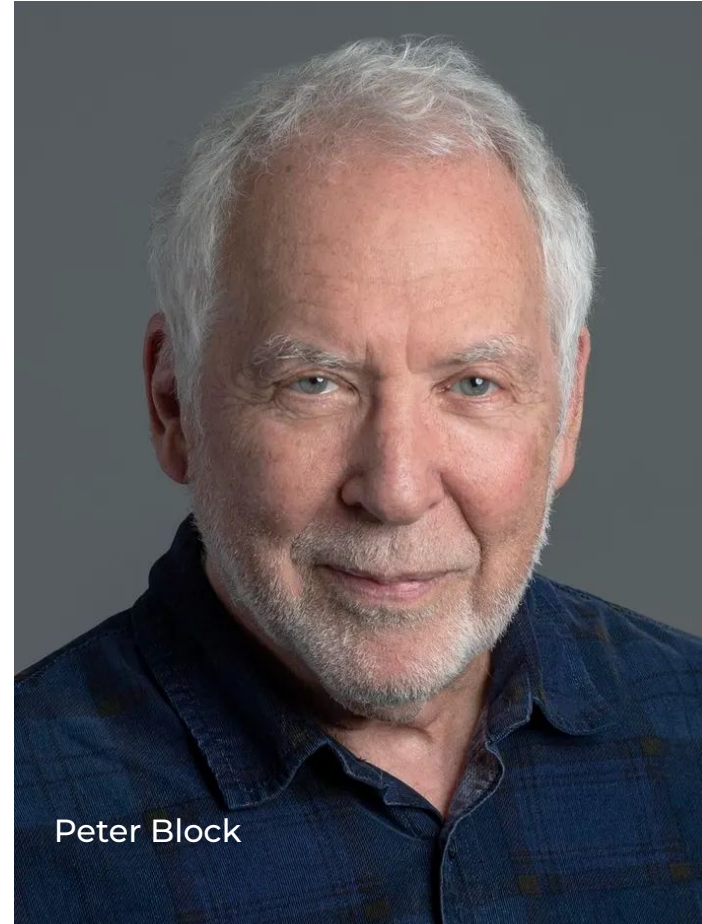
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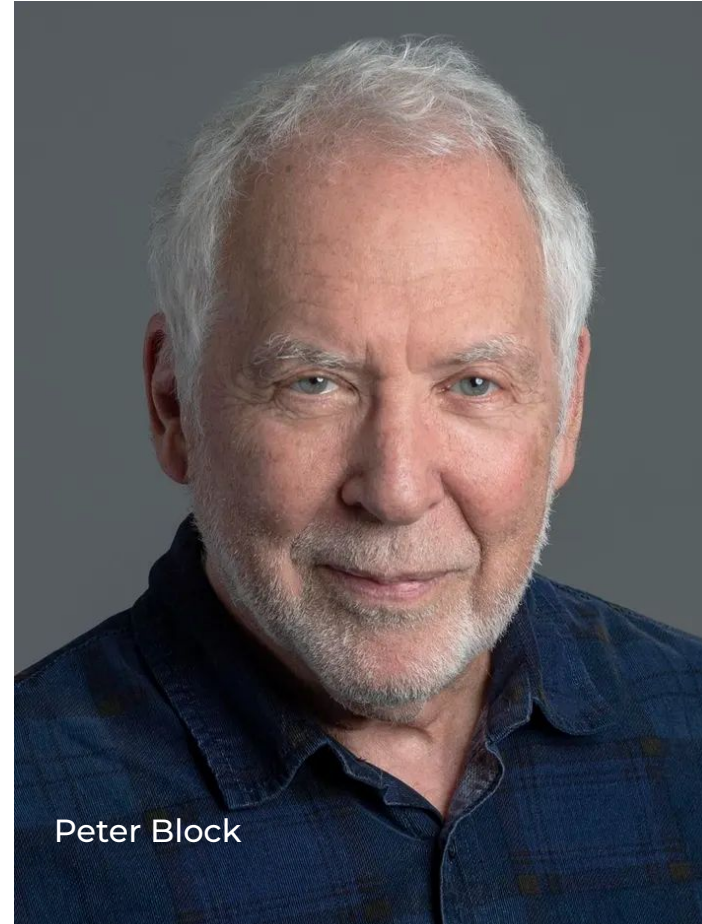
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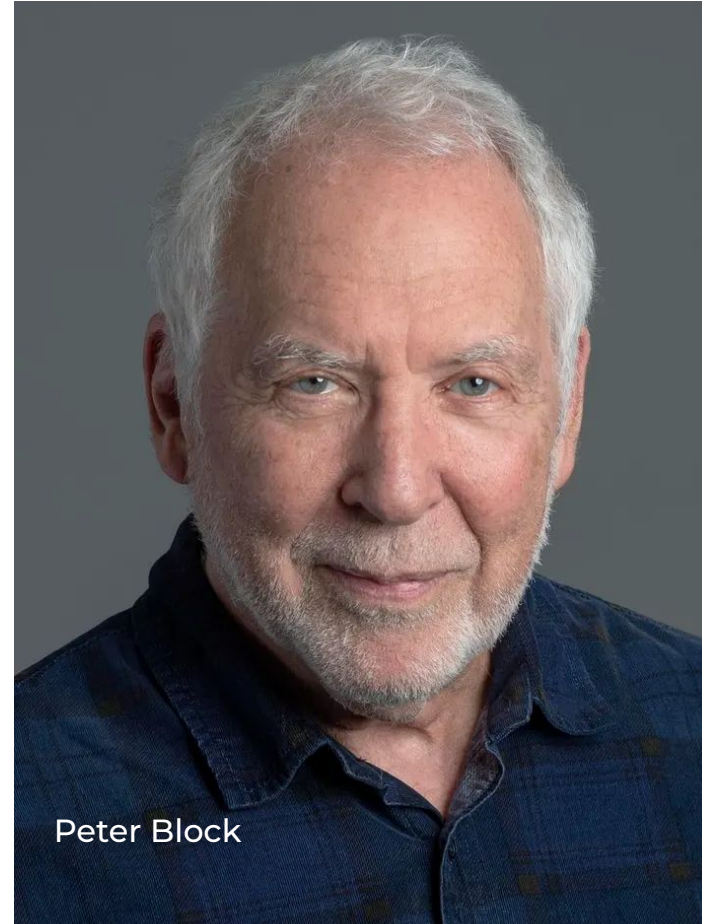
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**What are leaders
called to do when
leading others?**





“Confront people with their freedom”

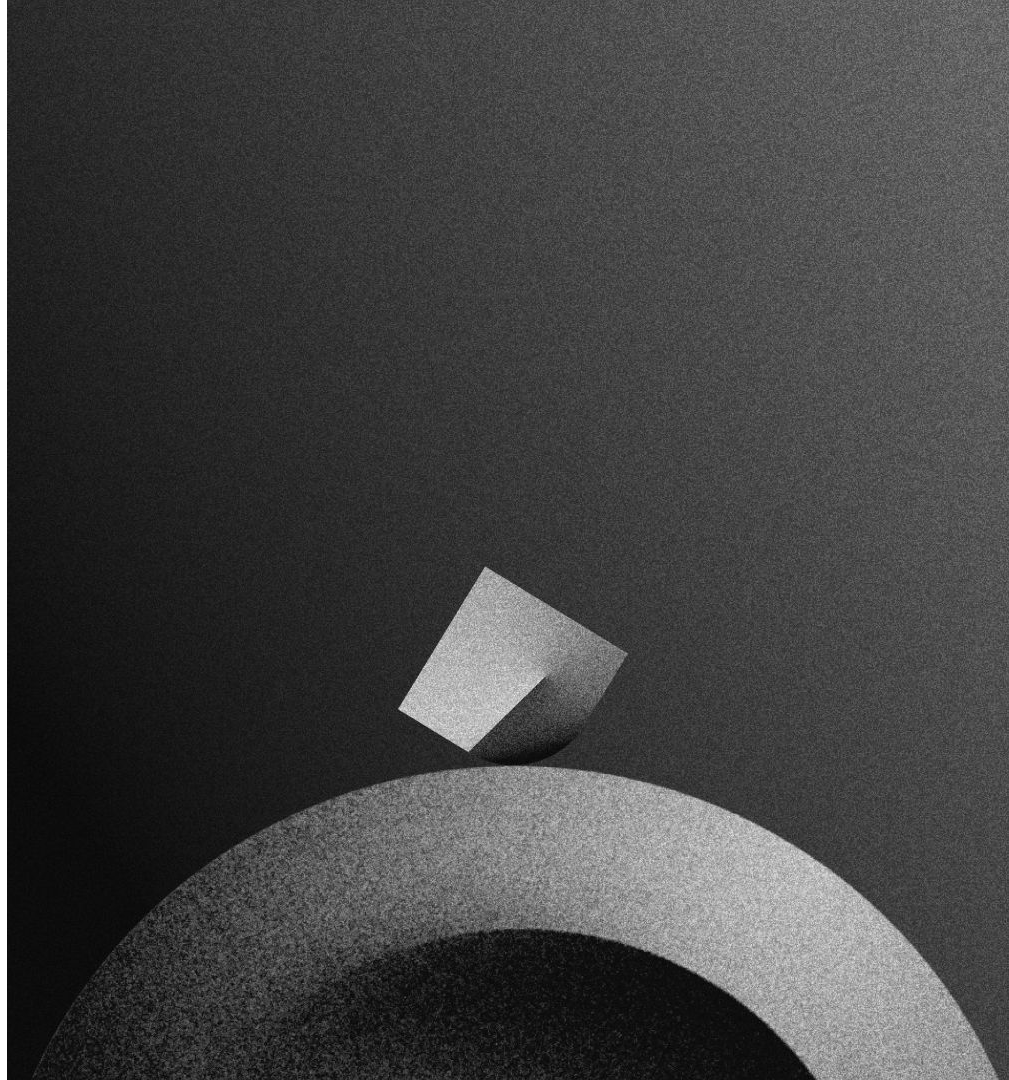
- Hire new team members with an expectation that they will fully perform their job.
- Make sure they are clear about the job they are signing up for.
- Make sure the team member knows they are making the choice on their own to perform the role.



“

Business owners confront people with their freedom by giving people choice, by not making promises of caretaking they can't deliver on, and by having adult-to-adult or partner-to-partner conversations.

Peter Block



**Example:
Confronting team with
their freedom**





“Choose to be accountable”

- Don't ‘*make*’ your team do their job.
 - allow the *responsibility* (sometimes I call this ‘*burden*’) of the work to reside with the team member that chose the role and salary.
- Don't accept the team's personal difficulties as the responsibility of the company to solve.
 - leaders care, support, and help. But they can't own the team's personal issues.



Example:
**Allowing your team to
choose accountability**





“act on that freedom”

- Challenge the team member to shape their own lives and circumstances, rather than accept external factors as the primary driver of their experience.
- Empower your team, don't treat them like your children, and that you have a responsibility to 'take care of them.'
- Success in a role fully resides within the power of the individual team member, not the leader.



Example:
**Showing the team how
they can act on their
freedom**





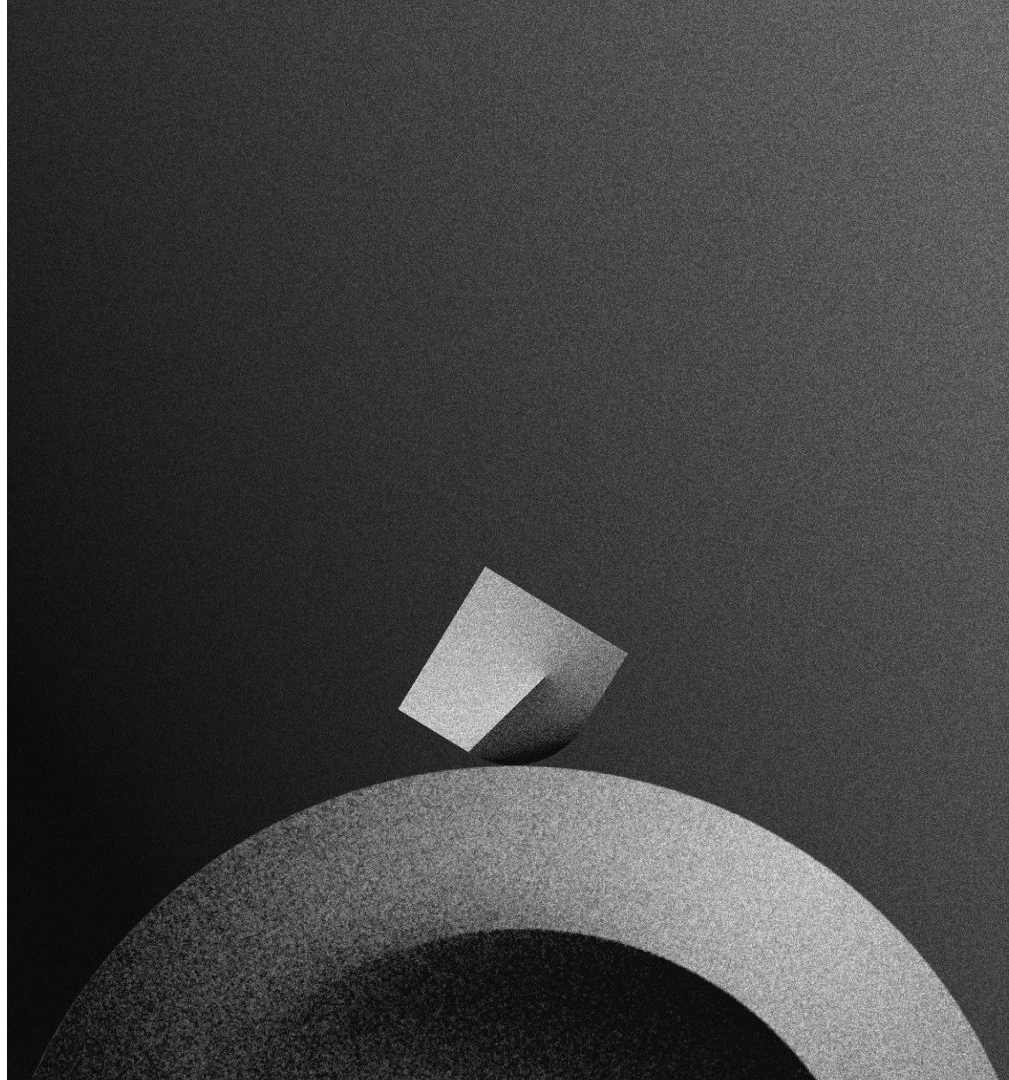
The basics & benefits of planning



“

Capacity management helps you prioritize your time, teaching you when to say yes and when to say no according to your plan.

**Jason Blumer, quote from
Managing Capacity.
Driving Productivity.**



Prioritize your future with your calendar



	MON	TUE	WED	THU	FRI	SAT
7 AM	Workout	Workout	Workout	Workout	Workout	Workout
8 AM						
9 AM	To do	Meeting		To do	Meeting	Meeting
10 AM				Meeting	To do	
11 AM	Meeting	Notes				To do
12 PM						
1 PM						
2 PM						
3 PM	Notes		Notes		Notes	
4 PM						Notes
5 PM						
6 PM						





'Yes' and 'No' Principles

- A calendar is a perfect visual view of the *limitations* of every human's capacity commitments.
- Say your 'yeses' first by blocking them on a calendar first. This leads you into your future.
- You have more power over your future than you think.
- Moving a block that you pre-set earlier is a 'no' you are saying that you previously said 'yes' to.
- Saying 'yes' and 'no' on the fly is not strategic and allows your work to own and overwhelm you.





Deep Work

“...the motivation for this strategy is the recognition that a deep work habit requires you to treat your time with respect.

A good first step toward this respectful handling is the advice outlined here: *decide in advance what you're going to do with every minute of your workday*. It's natural, at first, to resist this idea, as it's undoubtedly easier to continue to allow the twin forces of internal whim and external requests to drive your schedule.

But you must overcome this distrust of structure if you want to approach your true potential as someone who creates things that matter.”

Deep Work: Rules for Focused Success in a Distracted World

<https://amantha.com/podcasts/cal-newport-on-how-to-eliminate-80-of-emails-in-your-organisation/>



Cal Newport



**Being brave about
your capacity will
affect others**





Are you brave?

Here's a scenario you may face as you work at home.

You: “I know I’m at home, but when I’m in the bedroom, I am actually at work and can’t be disturbed.”

Your partner/spouse: “I just had a quick question to see if we could go out tonight for dinner after work is done.”

You: “Yes, but each interaction takes me away from my work, and cause it to take ever longer.”

Your partner/spouse: 😐



“Hey, I just have another quick question.”





Are you intentional with your time?

- Being intentional means being strategic. You are deciding to own your future and pre-decide what it should look like. Successful professionals are also planners.
- But your intention about your future, as displayed on your calendar, means it places boundaries around your time. That could be hard for others.
- There's a balance to this, but you may also need to have some hard conversations.





Questions to consider...

- Where are you unknowingly allowing others to dictate your future by having a say in your daily decisions?
- Be honest: where is your best work done? At home? In a cowork? Some other situation/location?
- Are you working against yourself? Do you distract yourself constantly? Do you need accountability to prevent this from happening?
- Are you too strict with your pre-blocked calendar and the future you are bound to see happen?





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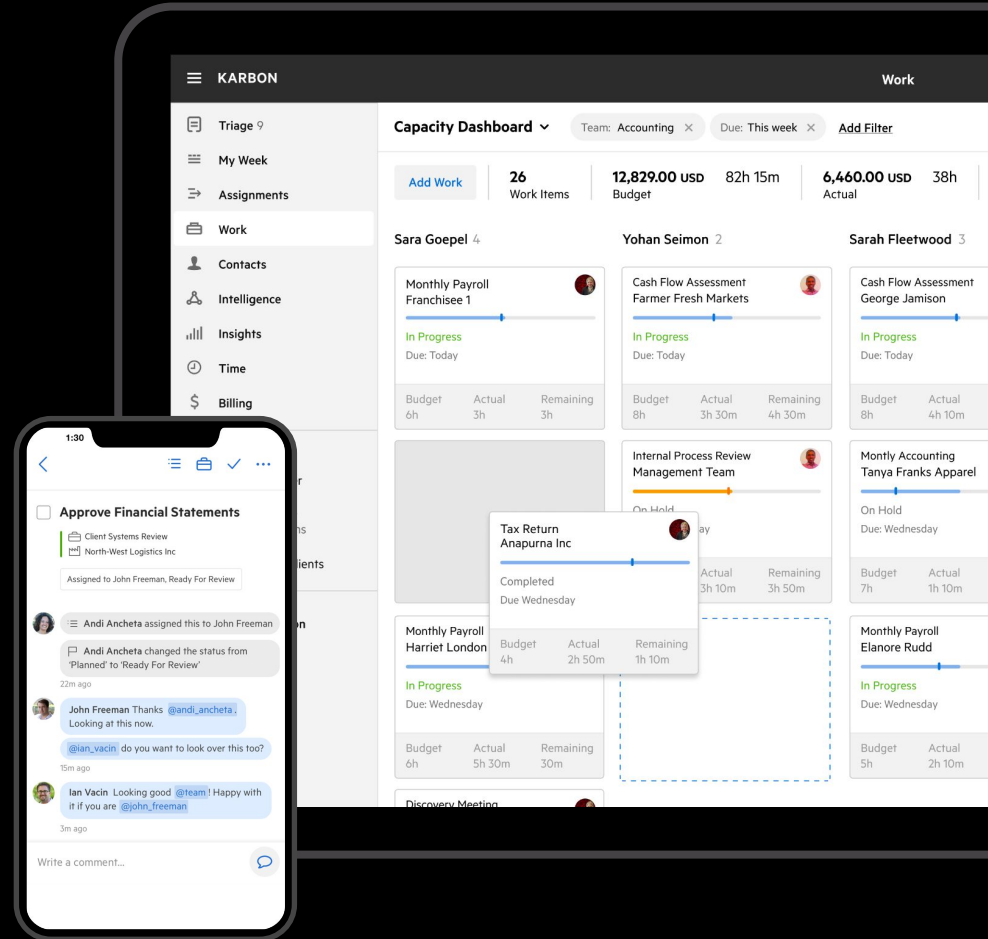




Practice Management for a More Connected Accounting Firm

Karbon is the collaborative practice management platform for accounting firms. It enables seamless communication and workflows so teams know who is doing what, when, why, and how. Remote or in the office, you're all together with Karbon.

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Q&A

