



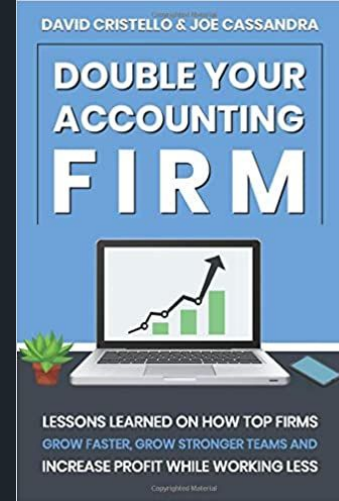
## Recurrence: State of Union

What's changing, why is it changing, and where are we going?

# What You'll Learn Today

1. Insights into our “Future of Firm Management” research
2. How that impacted our direction (and the ROI for your firm)
3. Why recurrence, why now? Current & future goals
4. Breakdown of how to manage in Jetpack Workflow using the updated recurrence system
5. Recap, Q&A, and next steps

# Who am I?



# Founder & CEO

Jetpack Workflow: What Do We Stand For?

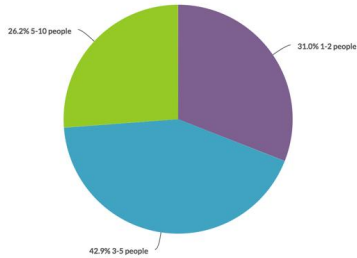
We wake up everyday to help you do your **best work.**

We aspire to build simple but powerful solutions to solve **painful workflow problems.**

Ultimately, we want you to deliver **high quality** client work that gets **done on time.**

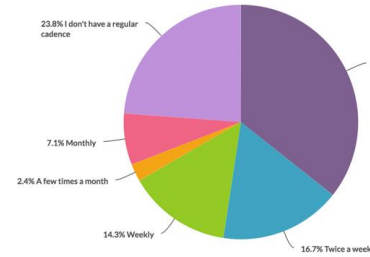
# Manage My Team Survey: **Insights**

2. How many people report to you?



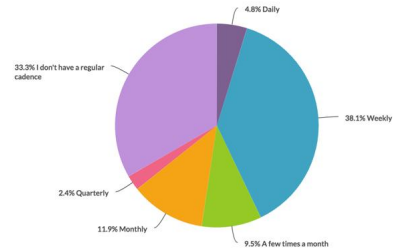
Average Manager has 3-5 Direct Reports

11. How often do you monitor progress for your team?



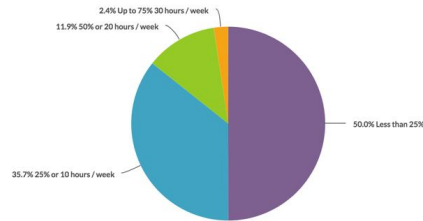
35% of Firm Managers Check Progress Daily

15. How often do you plan or schedule your team?



33% of Managers Don't Have a Set Planning Cadence

6. What percentage of your working hours per week do you spend in "management" (meetings, 1-1's, huddles, reviewing metrics or reports, etc.)



50% of Firm Managers Spend 10+ Hours/week managing

## Manage My Team: **Losing Control**

The average person uses **13 different methods to control and manage their time.**

A manager on average spends **3 hours each day on interruptions.**

On an **average day, there are 17 million meetings in America** (as much as 30% are “unnecessary”)

# Manage My Team: **The Critical 3**

## What's Due?

Jobs List  
MyWork  
Progress Report  
Labels & @Notes

## What's Done?

Archive View  
Dashboard  
Job Profile  
Task List

## What's Upcoming?

Metric Report?  
Calendar?

# Manage My Team: **ROI Driven**

**“ We moved from spending 35% of our time on admin/non billable client work to only spending 15% of our time (across the entire team!). ”**



**Gianna Nyugen**

Manager- Accounting &  
Operational Advisory



**Andrew Nyugen**

Owner, Nguyen &  
Company, CPA



# Manage My Team: **Backed By Research**

**Harvard  
Business  
Review**

[Source](#)

Three particular skills separate time management success from failure:

1. Awareness: thinking **realistically about your time** by understanding it is a limited resource.
2. **Arrangement:** designing and organizing your plans, schedules, and tasks to effectively use time.
3. Adaptation: monitoring your use of time while performing activities, **including adjusting to interruptions or changing priorities.**

Manage My Team: **Why Recurrence**

**Workload and Work Balancing Coming Q4**



# Manage My Team: **Why Recurrence**

Adjustment for Your Firm



# Manage My Team: **Why Recurrence**

Recurrence as an “Event”



# Manage My Team: **Why Recurrence**

1. TeamWork Management
2. Adjustment for Your Firm
3. Recurrence as an “Event”

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# Let's Dive in

# What Blocks Firms From Growing?

“I Need to Develop Leaders  
(without losing control)”

“I Need to Manage My Team & Scale  
Client Experience”

“I Need to Get Organized”