



LEAD: ANALYST TRACK Q2

Learn, Elevate, Apply, Develop

BRIDGE
INVESTMENT
GROUP

Executive Guest Speaker:



Connor Tamlyn
Managing Director
Bridge Logistics Properties

LEAD - ANALYST TRACK



Q1 – Foundations for Success

- Bridge Values and Departments
- Performance Expectations
- Career Progression and Opportunities



Q2 – Time Management and Organization

- Prioritizing Tasks
- Multitasking Myth
- Enhance efficiency to improve work-life balance



Q3 – A Practical Approach to Analytical Thinking

- Understanding and Analyzing Data
- Researching Techniques
- Critical Analysis Techniques



Q4 – Goal Identification, Goal Setting, & Goal Mgt.

- Developing Realistic Goals
- Avoiding Ambiguity
- Aligning Goals with Business Objectives



FLOW OF AN UNPRODUCTIVE DAY

MORNING

**PLANS TO COMPLETE
IMPORTANT AND LONG
TERM TASKS**



NOON

**OTHER TASKS HAVE
TAKEN PRIORITY**



EVENING

**HOPING FOR SOME
SPARE TIME**

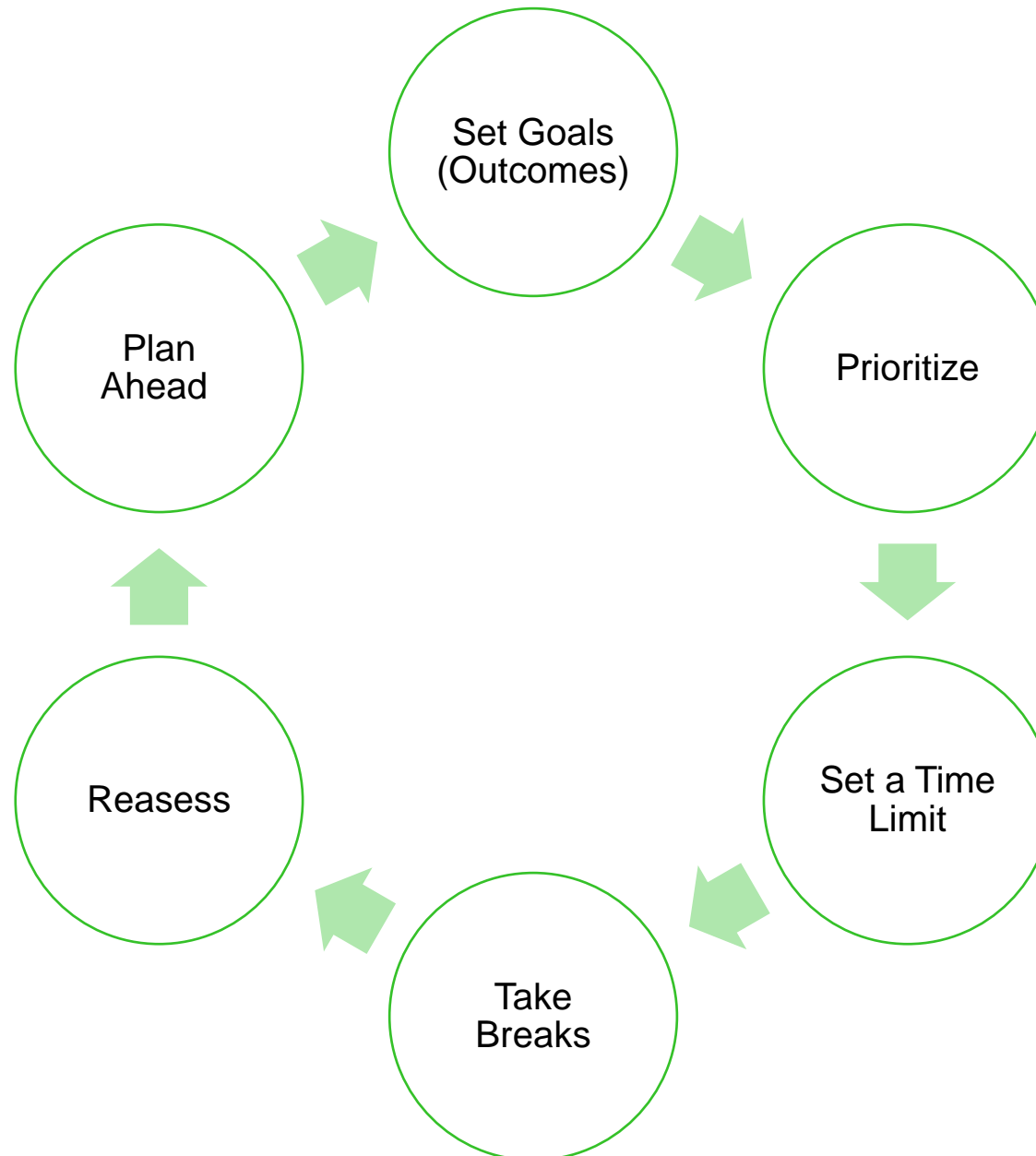


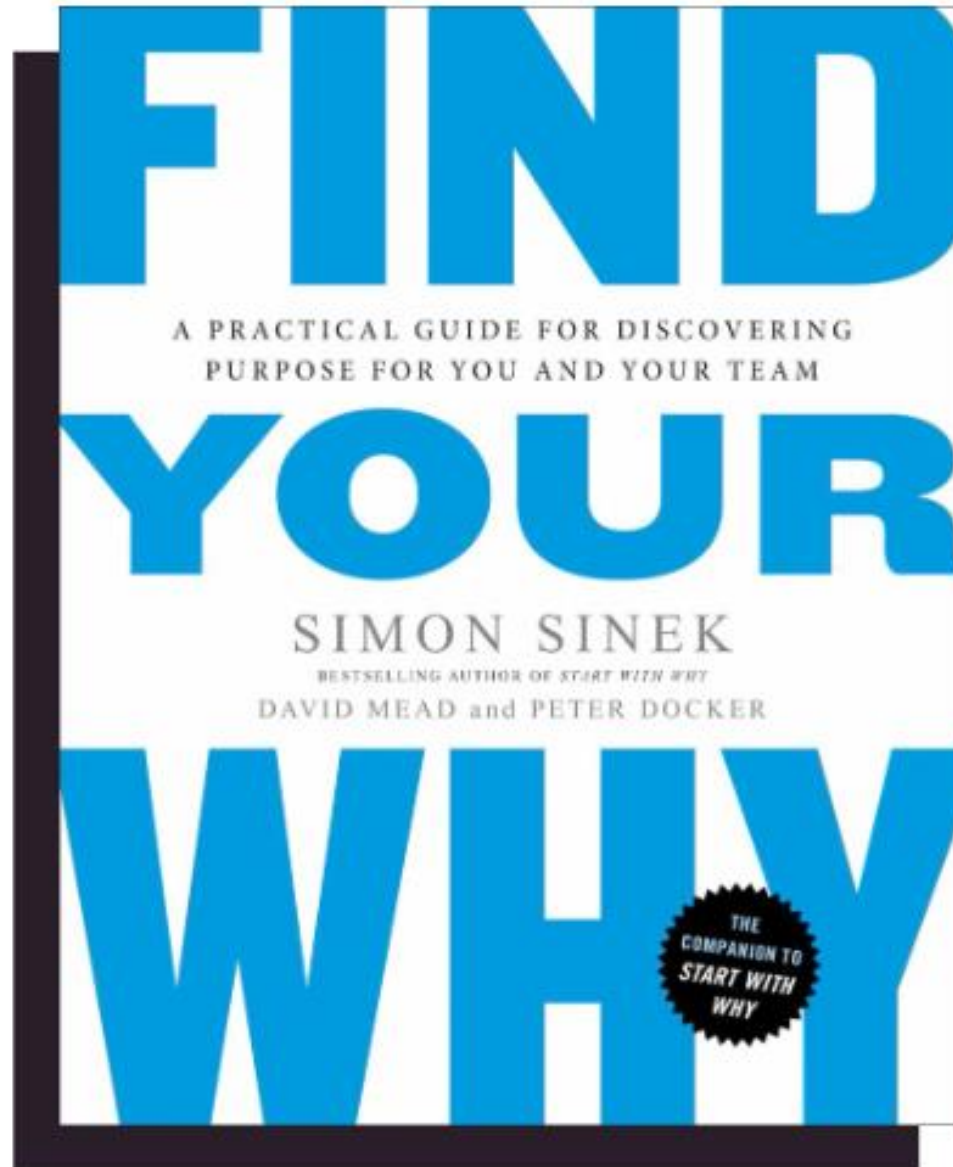
NIGHT


**BARELY ANY LONG
TERM TASKS
COMPLETED**



Time Management Tips







Set Goals
(Outcomes)



S

SPECIFIC

You need to be clear on what you want to accomplish.




M

MEASURABLE

The goals should be quantifiable. For example, generate one lead per month.




A

ACHIEVABLE

The goals should not be too easy or too hard. Set ambitious, but realistic targets.




R

RELEVANT

The target should align with your business goals.




T

TIME-BOUND

Set a time frame and/ or a clear deadline for achieving your goals.



Prioritize

A. Most Important

B. Important

C. Least Important

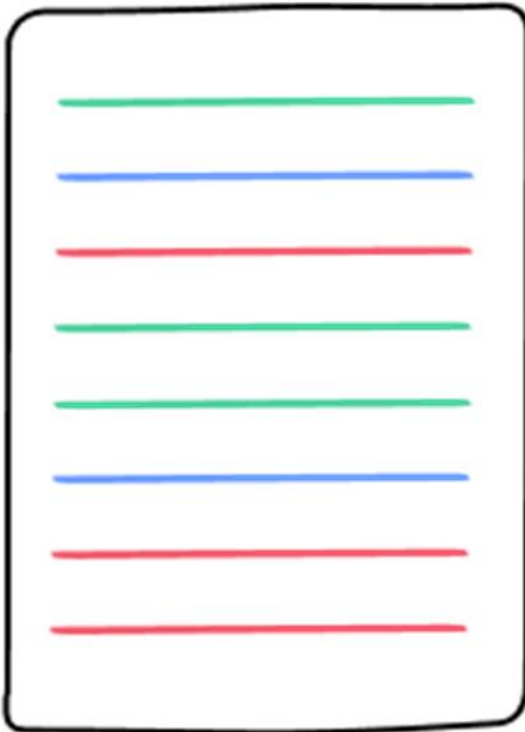
Unsorted



Step One



Step two



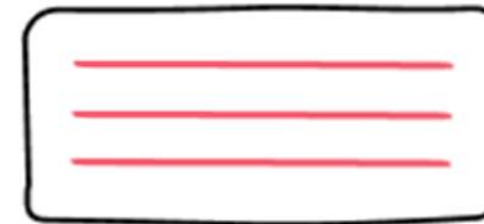
A.



B.



C.



A1. _____

A2. _____

A3. _____

B1. _____

B2. _____

B3. _____

C1. _____

C2. _____

C3. _____

The Ivy Lee Method

1

Write down your (6) most important tasks

2

Arrange tasks from most to least important

3

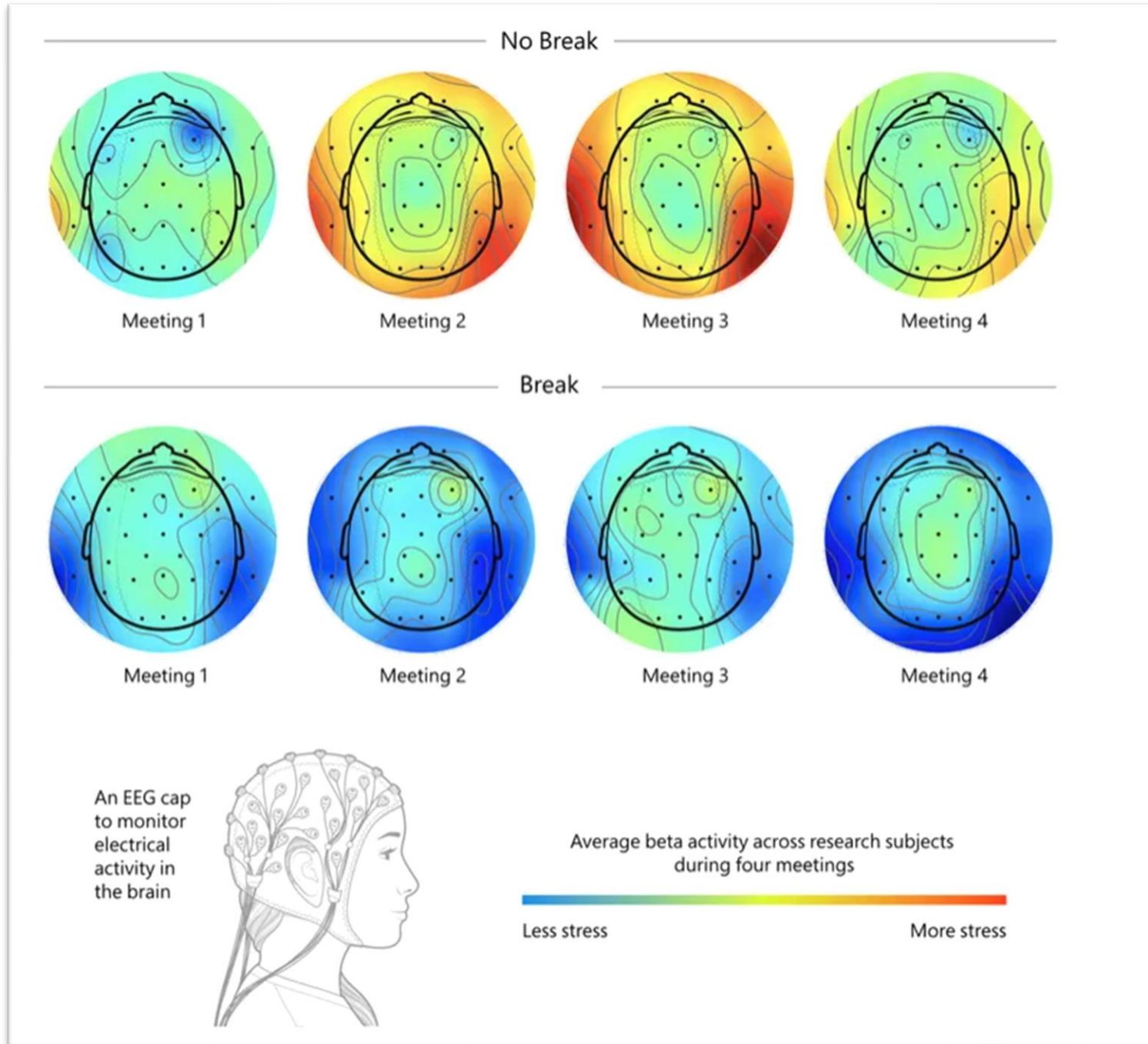
Start working down your list in the order

4

Move any unfinished tasks to tomorrow's list

Psychological Benefits of Taking Breaks

Take Breaks



Reassess

	URGENT	NOT URGENT
IMPORTANT	DO problems deadlines some calls	DEFER planning learning creative activities
NOT IMPORTANT	DELEGATE interruptions meetings emails	DELETE trivial issues Facebook coffee breaks

MULTITASKING

ADVANTAGES

Can save time

Can train your brain

Improve flexible thinking

DISADVANTAGES

Leads to stress & burnout

Lowers overall efficiency

Not sustainable

ORGANIZATION TOOLS AND TECHNIQUES

1.

Checklists

- Agendas
- Sticky Notes
- Online Agendas
 - Trello

2.

Technology

- Microsoft
 - Lists
 - Excel
 - Planner
- ChatGPT
- Apps

3.

Manage Up

- Provide regular, concise updates
- Seek feedback
- Speak up when overwhelmed

4.

Plan Tomorrows Tasks Today

- Prioritize your workload at the beginning of the day
- Adjust priorities throughout the day
- Move unfinished tasks to the beginning of tomorrow's task list

5.

Minimize Interruptions

- Silence phone notifications
- Turn on DND on Teams
- Wear a headset while sitting at your desk

Plan Ahead

The Pomodoro Technique



25 minutes focused work



5 minutes break



25 minutes focused work



5 minutes break



25 minutes focused work



5 minutes break



25 minutes focused work



30 minutes break

Set a Time Limit

1 Session

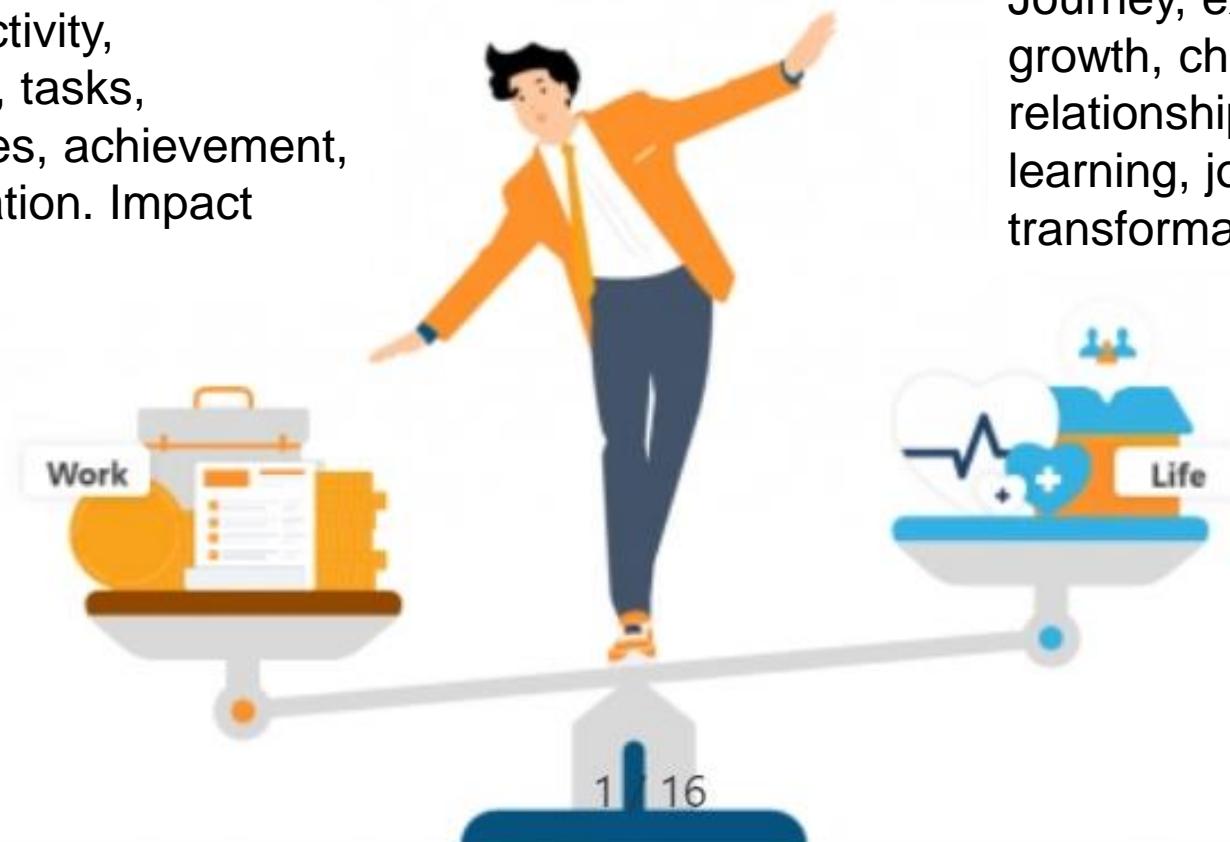
Working time: 100 min
Break time: 45 min
Total time: 145 min
= 2 h 25 min

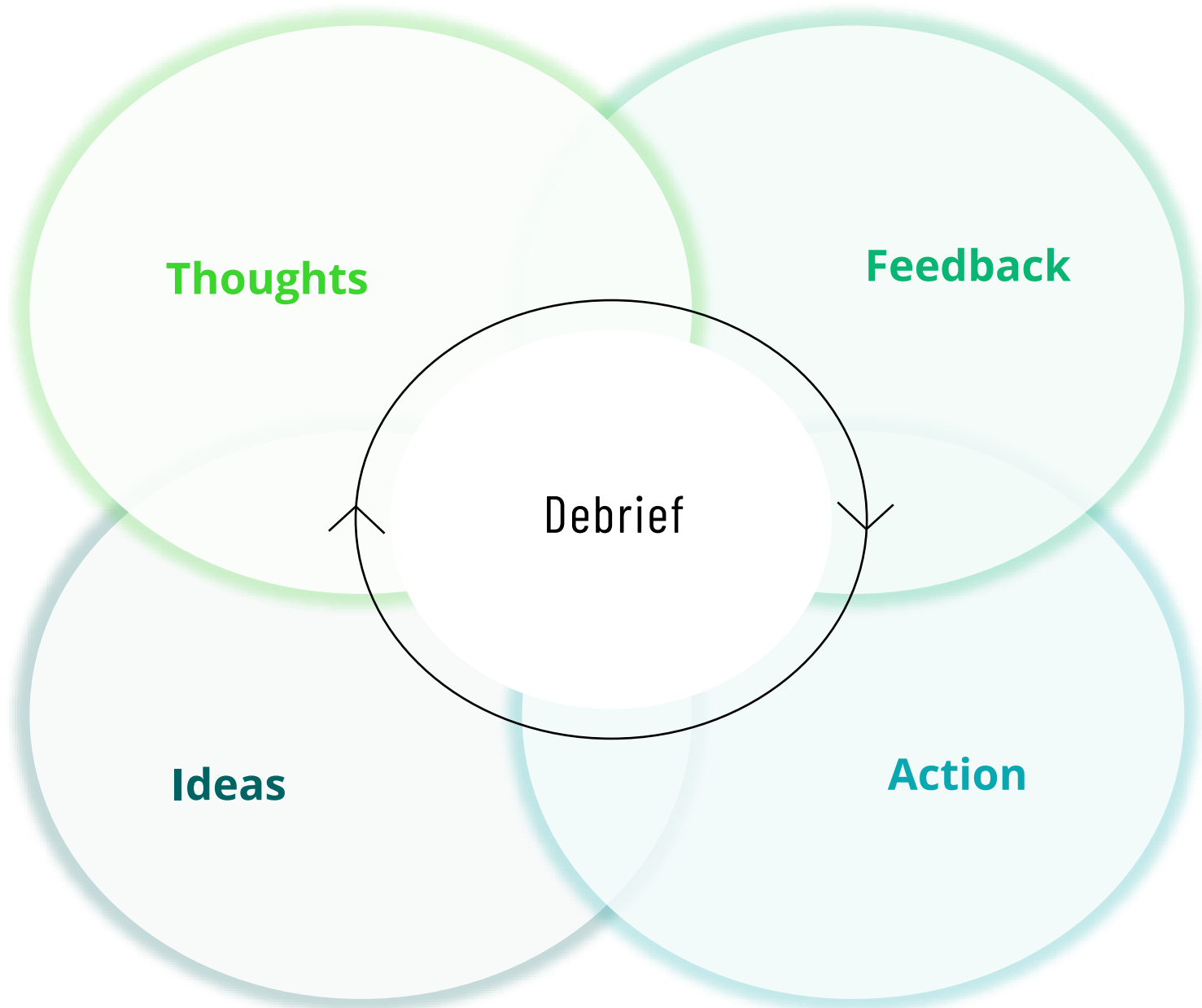
Take Breaks

Work Life Balance

Effort, productivity, collaboration, tasks, responsibilities, achievement, goals, innovation. Impact fulfillment

Journey, experiences, growth, challenges, relationships, meaning, learning, joy, reflection, transformation





Thoughts

Feedback

Debrief

Ideas

Action

The background of the slide is a light blue surface covered with numerous small, light-colored wooden blocks. Each block has a black question mark printed on its top surface. The blocks are scattered across the entire frame, creating a pattern of questions.

QUESTIONS?

LEAD at Bridge


BRIDGE
INVESTMENT
GROUP

INTRANET

The one-stop shop for all Bridge resources



APPENDIX



Define activities	Estimate length of time	Plan buffer time	Establish prioritized decisions	Note success level
A	L	P	E	N
Make a list of everything you need to do	Estimate how long each task will take to complete	Reserve 20% of your time for unexpected events and another 20% for social activities	Prioritize your tasks and do the most important ones first	After work, check how successful your planning was

Plan Your Days with Ivy Lee Method

In 1918, Charles M. Schwab, an American steel magnate and one of the richest men in the world, asked Ivy Lee, a renowned PR professional at the time, to come up with an idea of how to improve the efficiency of his team. In his turn, Ivy Lee requested to have a 15 minutes talk with each of Schwab's executives and taught them the following shockingly simple but powerful approach:

- **Step 1:** At the end of the day, make a list of your six most important tasks that you want to accomplish the next day.
- **Step 2:** Prioritize the items in the list from most to least important.
- **Step 3:** The next day, focus on the top priority task and don't work on anything else until it's done. Consistency helps you to concentrate on a single thing and strengthens your focus and discipline.
- **Step 4:** Move unfinished tasks to the next day's list and put unfinished tasks at the top of the list. Complete the list of six tasks with more items until there are six of them.
- **Step 5:** Repeat this process every end of day.

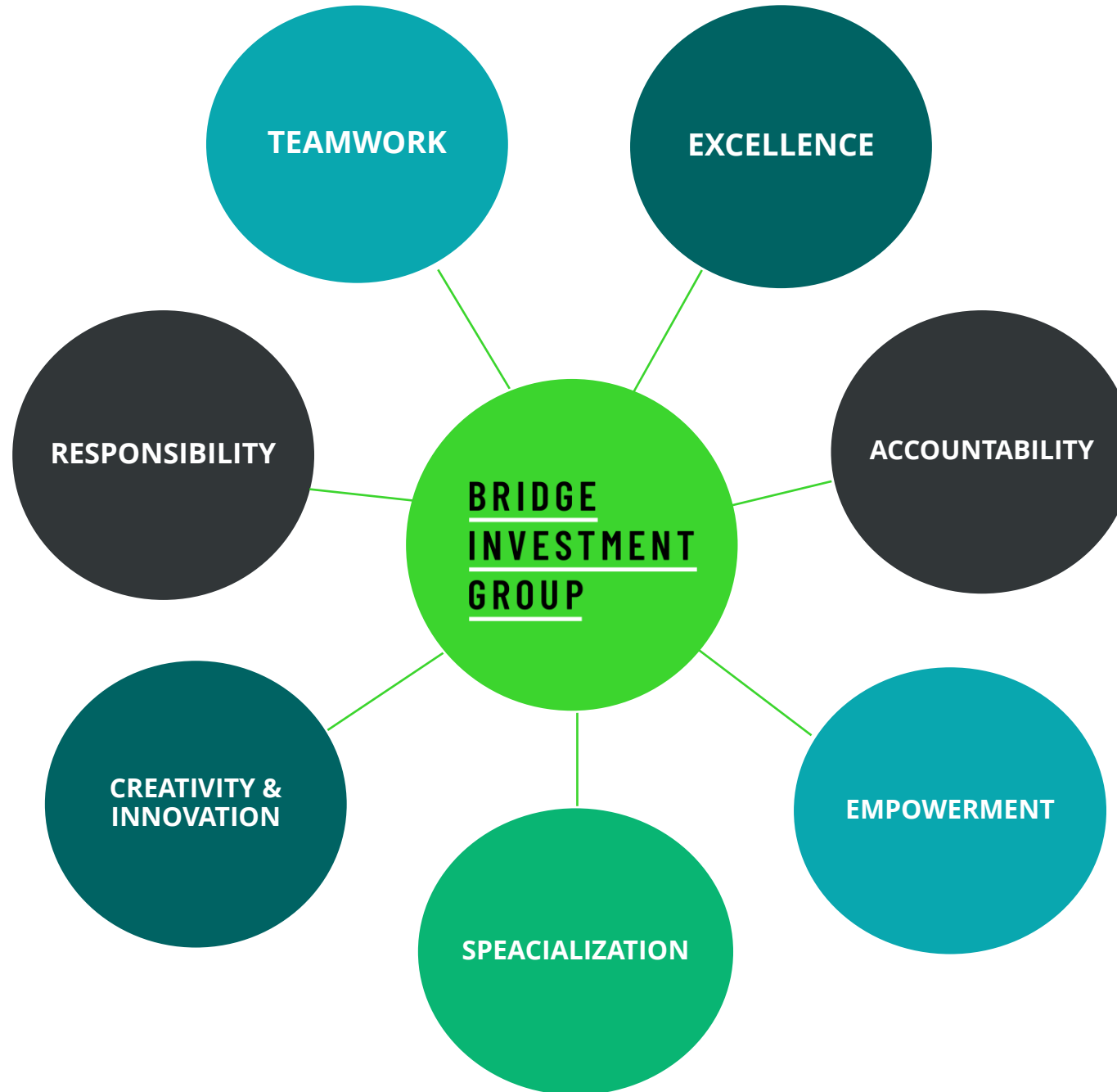
12 Time Management Strategies

- 1 The ALPEN method
- 2 The 1-3-5 rule
- 3 Use time management tools
- 4 The rapid planning method
- 5 Work breakdown structure (WBS)
- 6 The ABC method
- 7 Zen to Done
- 8 The Eisenhower Matrix
- 9 The Pomodoro Technique
- 10 The Pareto Principle
- 11 The Flowtime Technique
- 12 Use time blocking

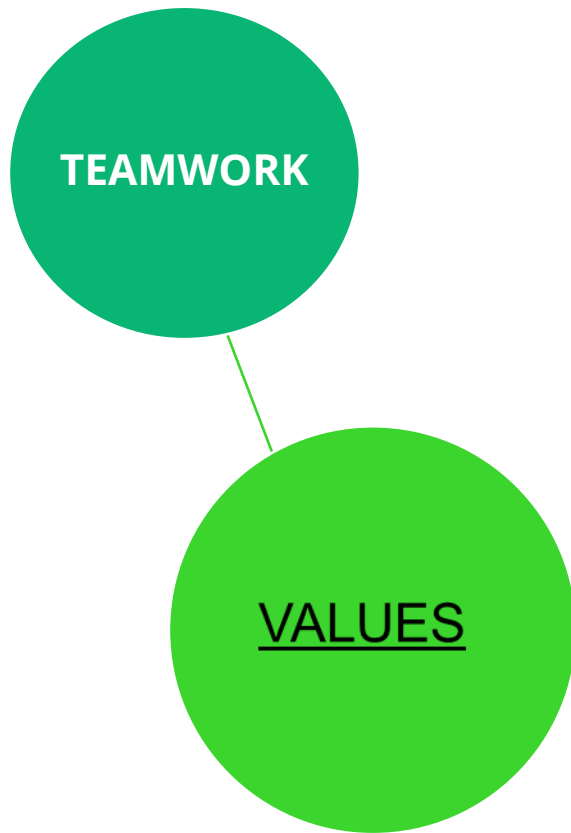
toggl.com/blog/time-management-strategies

toggl

ONE BRIDGE - Living Our Values

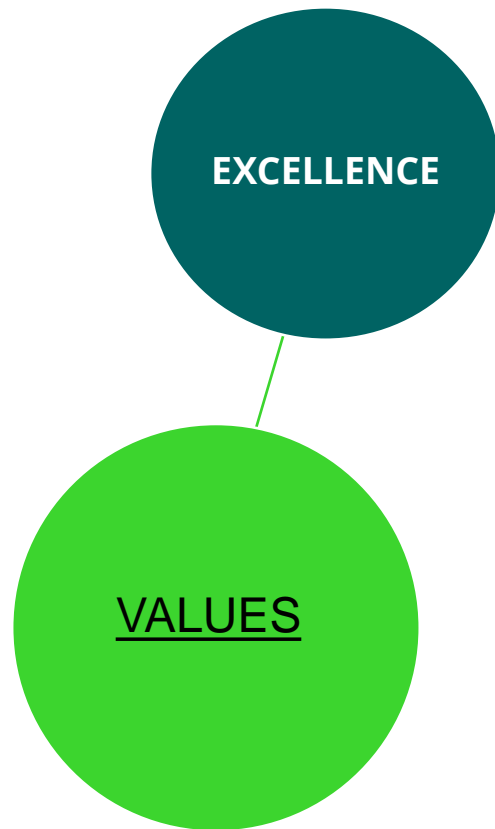


ONE BRIDGE - Teamwork



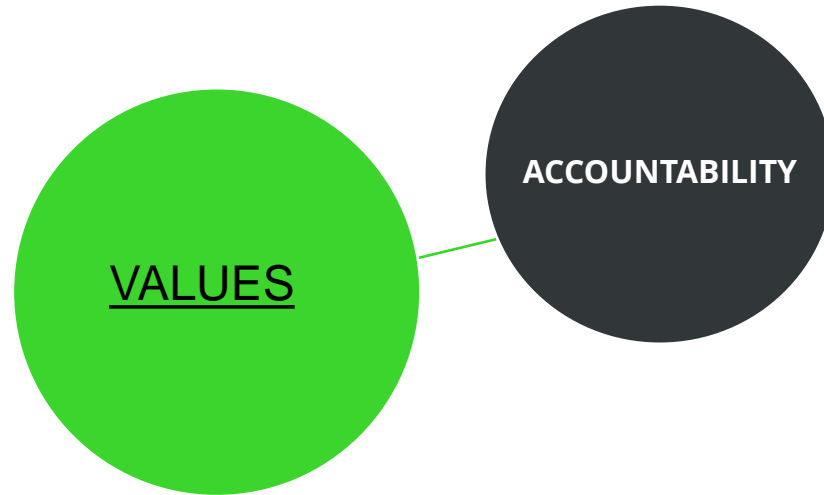
- We emphasize teamwork in everything we do.
- We thrive on collaboration, hard work and open and honest communication.

ONE BRIDGE - Excellence



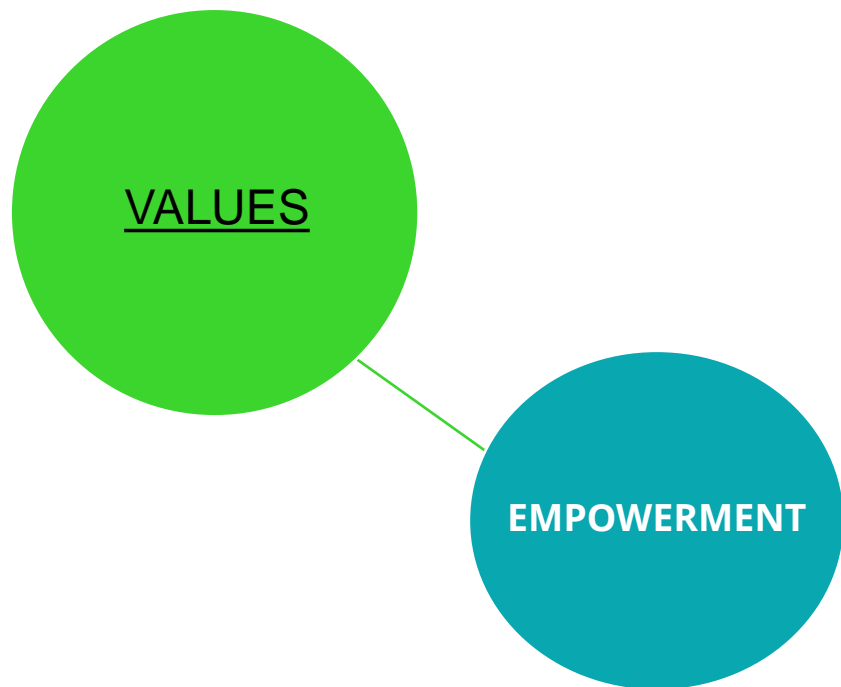
- We strive to be the best performing firm in our industry.
- We take pride in our performance and celebrate our achievements.
- We do what is right – for the right reasons.

ONE BRIDGE - Accountability



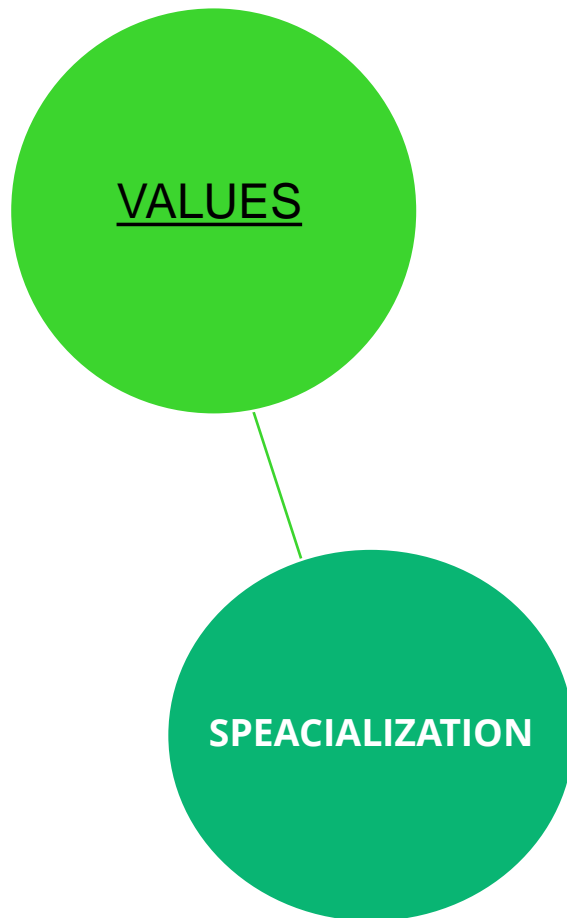
- We stand behind our word and strive for continuous improvement in all that we do.
- We face facts and realities, and we embrace challenges.

ONE BRIDGE - Empowerment



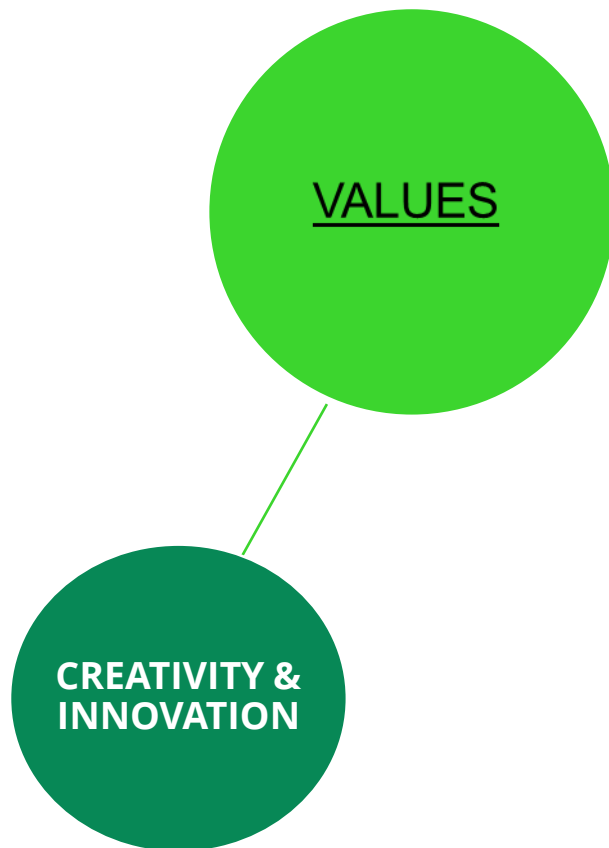
- We empower our people to reach their full potential.
- We cultivate a diverse and inclusive culture of disciplined analysis and action.
- We believe that diversity is the only path to superior performance.

ONE BRIDGE - Specialization



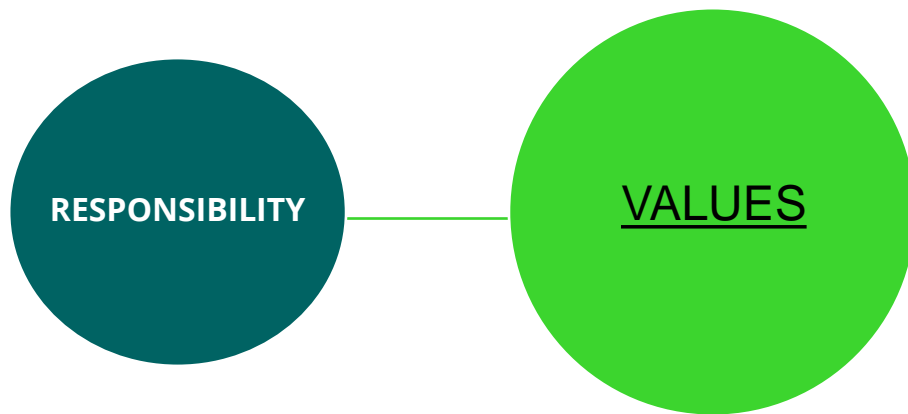
- We develop specialized investment and operating teams which have deep sectoral knowledge of the areas in which we invest.
- We use data, carefully analyzed and fully vetted, to complement decades of experience, in guiding our investment decisions.

ONE BRIDGE - Creativity & Innovation



- We consistently reexamine how we operate and seek innovative solutions to improve our performance, at the asset level, at the Fund level and at the corporate level.
- New ideas are carefully examined and adopted if appropriate.

ONE BRIDGE - Responsibility



- We invest and operate responsibly and believe that strong corporate and individual citizenship go hand-in-hand.
- We understand that responsible investing does not sacrifice returns but should in fact enhance risk and return characteristics through deliberate and thoughtful integration of environmental, social and governance best practices.