

Proactive Time Allocation



This resource will assist you in becoming more proactive with how you choose to use your time. It can be the first step in creating amazing results in your life professionally and personally.

Your Professional Time

It doesn't have to be chaotic. There can be an element of control. It's entirely up to you to take control of how you structure your professional time. Regardless of where you are an Advisor, you can be in control of your time. In other words, you are not unique: most Advisors face the same types of time challenges.

1

Clearly identify when you are not available for professional time.

- Use your organizer to block off weekends, holidays and vacation days as applicable for you over the coming year.

2

Block off any other professional time that is not available because it is set aside for other priority business activities and/or commitments.

- Block out all of your regular weekly, monthly and quarterly commitments (i.e. meetings, conference calls, etc.).
- Block out any other timed commitments you may have (i.e. training, travel, etc.).
- Block off your regularly scheduled lunches and other breaks as required to keep you refreshed throughout the day.
- Block off the time before you come into and leave the office day – so you have a true representation of what is left for your professional time each day.

3

Specify a purpose for each day of the week.

- Planning & Preparation (i.e. Monday)
- Meeting with Clients and Prospects (i.e. Tuesday through Thursday) • Follow Up, Research, Networking and general Clean Up (i.e. Friday)



4

Specify daily tasks and routine activities related to the weekly structure you've set.

Planning Time

- Business Development Planning
- Business Goal Setting – Monitor & Review
- Weekly Team Meeting and other HR related activities
- Weekly Management and/or Advisor Meeting – Conference Calls
- Preparing for meetings, events or other deliverables for clients and prospects

Productive Time

- Meeting with clients and prospective new clients
- Calling clients and prospective new clients

Administrative & Other Time

- Paperwork and other administrative tasks necessary for the ongoing operations of your practice. As much as this as possible should be aligned with your assistant and/or other team members. This is not a good use of an Advisor's time.
- Research or reading time
- Special Projects Time

Since we can't plan for everything, structure is important, but flexibility is necessary. Your work week will not be perfect. However, being proactive is the first step to ensuring you use your time in a way that actually serves you.

5

Prioritize your remaining activities.

- Take the opportunity to allocate time to the remaining activities as it relates to your business and schedule accordingly.
- Be sure to address time-sensitive activities appropriately.
- Don't block out your entire work week. You need to allow time to respond to in bound, client-related and other non-routine activities.



6

Keep track of your progress.

- Use your organizer to create a list of items you are working on for the day and mark them as “completed” as soon as they are done.
- This process will give you a sense of accomplishment and increase your motivation to complete other tasks.
- It also creates an important historical record of all client-related activities.

7

Monitor your approach.

- Pay attention to what is working well with how you have allocated or time and keep doing it. Similarly, identify any areas related to your proactive time use causing you concern and take the steps to address them.

Remember: Don't confuse *activity* with *productivity*.

Activity is not the same as productivity. Many professionals are surprised by how many hours per week are actually spent on tasks that contribute to productivity. Be aware of where and how you spend your time each day.

Your Personal Time

Be proactive about scheduling personal time to ensure you are getting the breaks you need and using personal time in a way that leaves you feeling personally fulfilled.

1

Allocate and schedule your vacation time.

- This time off is necessary to reenergize with the activities, interests and people that are essential components of your Ideal Life. By doing this, you will have something great to look forward to.

2

Identify times when you are not available for personal time.

- The obvious here is when you are at work – which is clearly not personal time. However, there is also time spent commuting to and from work, doing weekly grocery shopping, completing household chores, sleeping and eating - all of which are necessary parts of life for most of us. Nevertheless, it means these times are not available for ‘personal’ use.



3

With the completion of Step 2 above, you are now in a better position to identify when personal time is truly available to you.

- Examine the personal time you have available. Next, reflect back to your Ideal Life and Life's Goals to be clear on what you have deemed as important.

4

Now you can allocate personal time to the other activities, people and causes in your life that you value.

- Note: We are not suggesting you schedule every detail of your personal life. However, anything that is a significant priority to you should be booked in and 'protected'.

5

Assess what's working and what's not working for you.

- You may notice you need to create or change some habits to help you achieve your personal goals. Studies show, that by scheduling proactively, your productivity, effectiveness and even job satisfaction increases.

Continuous Fine-Tuning

Over time you will develop a proactive approach to using your time that brings balance to you personally and professionally. Another result of this approach is the presence of more available time. For individuals used to being busy 24-7, this can be uncomfortable.

It's a classic case of "Be careful what you ask for, you just might get it." This is often made even more complex by our beliefs and expectations about how many hours we put into the office. This is another great example of quality versus quantity.

For example, we work with many Advisors who work fewer hours, but are more productive because of it. Why? Because when they are at the office, they are focused on the important and productive business activities. Therefore, they actually create more personal time for themselves.

