

Reclaim your time

Do more of what you love



Leading advisors know that spending time on value-add activities can enhance the overall client experience, resulting in repeat business, quality referrals and business growth. Reclaim your time by focusing the right attention on the right activities.

Step 1: Where are you spending your time?

Here are some of the tasks and activities you can undertake within your practice. This exercise will help you identify the activities you're responsible for. Blank spots exist for you to add other tasks not currently listed.

Build an understanding of where you individually spend time by checking off each activity that you're responsible for and how many hours you currently spend on it per week. You'll be asked to record ideal hours in Step 3.

Client-facing	Current hours/week	Ideal hours/week
<input type="checkbox"/> 1. Client appreciation events		
<input type="checkbox"/> 2. Client celebration activities (calls, cards, emails, lunch)		
<input type="checkbox"/> 3. Client communication (emails, phone calls)		
<input type="checkbox"/> 4. Client education (one-on-one, sharing articles, seminars)		
<input type="checkbox"/> 5. Client lunches, dinners, etc.		
<input type="checkbox"/> 6. Client meetings/appointments		
<input type="checkbox"/> 7. Client servicing tasks		
<input type="checkbox"/> 8. Financial strategy discussions		
<input type="checkbox"/> 9. Networking/prospecting		
<input type="checkbox"/> 10. Portfolio evaluation		
<input type="checkbox"/> 11. Presentations (clients/prospects)		
<input type="checkbox"/> 12. Prospect meetings		
<input type="checkbox"/> 13.		
<input type="checkbox"/> 14.		
<input type="checkbox"/> 15.		
	Total	Total

Business operations	Current hours/week	Ideal hours/week
<input type="checkbox"/> 16. Appointment scheduling		
<input type="checkbox"/> 17. Business development tasks		
<input type="checkbox"/> 18. Business & strategy planning		
<input type="checkbox"/> 19. Centers of Influence (COI) relationships		
<input type="checkbox"/> 20. Client Relationship Management (CRM) notes		
<input type="checkbox"/> 21. Coaching & managing team		
<input type="checkbox"/> 22. Compliance & regulatory tasks		
<input type="checkbox"/> 23. Financial analysis preparation		
<input type="checkbox"/> 24. Investment management		
<input type="checkbox"/> 25. Marketing planning/activities		
<input type="checkbox"/> 26. Meeting agenda preparation		
<input type="checkbox"/> 27. Meeting preparation		
<input type="checkbox"/> 28. Newsletter curation		
<input type="checkbox"/> 30. Office supplies & inventory		
<input type="checkbox"/> 31. Operations & filing		
<input type="checkbox"/> 32. Portfolio management		
<input type="checkbox"/> 33. Presentation creation		
<input type="checkbox"/> 34. Professional development		
<input type="checkbox"/> 35. Proposal review		
<input type="checkbox"/> 36. Segmentation		
<input type="checkbox"/> 37. Social media		
<input type="checkbox"/> 38. Team meetings		
<input type="checkbox"/> 39. Technology & website updates		
<input type="checkbox"/> 40.		
<input type="checkbox"/> 41.		
<input type="checkbox"/> 42.		
Total	Total	Total

Step 2: What activities should you focus on?

Based on your business growth and personal priorities, determine which activities to prioritize and which to delegate. Plot the task or activity number from Step 1 into the appropriate quadrant using the following guidelines.

Avoidance Zone

Frustrating activities that are time-consuming.

Interruption Zone

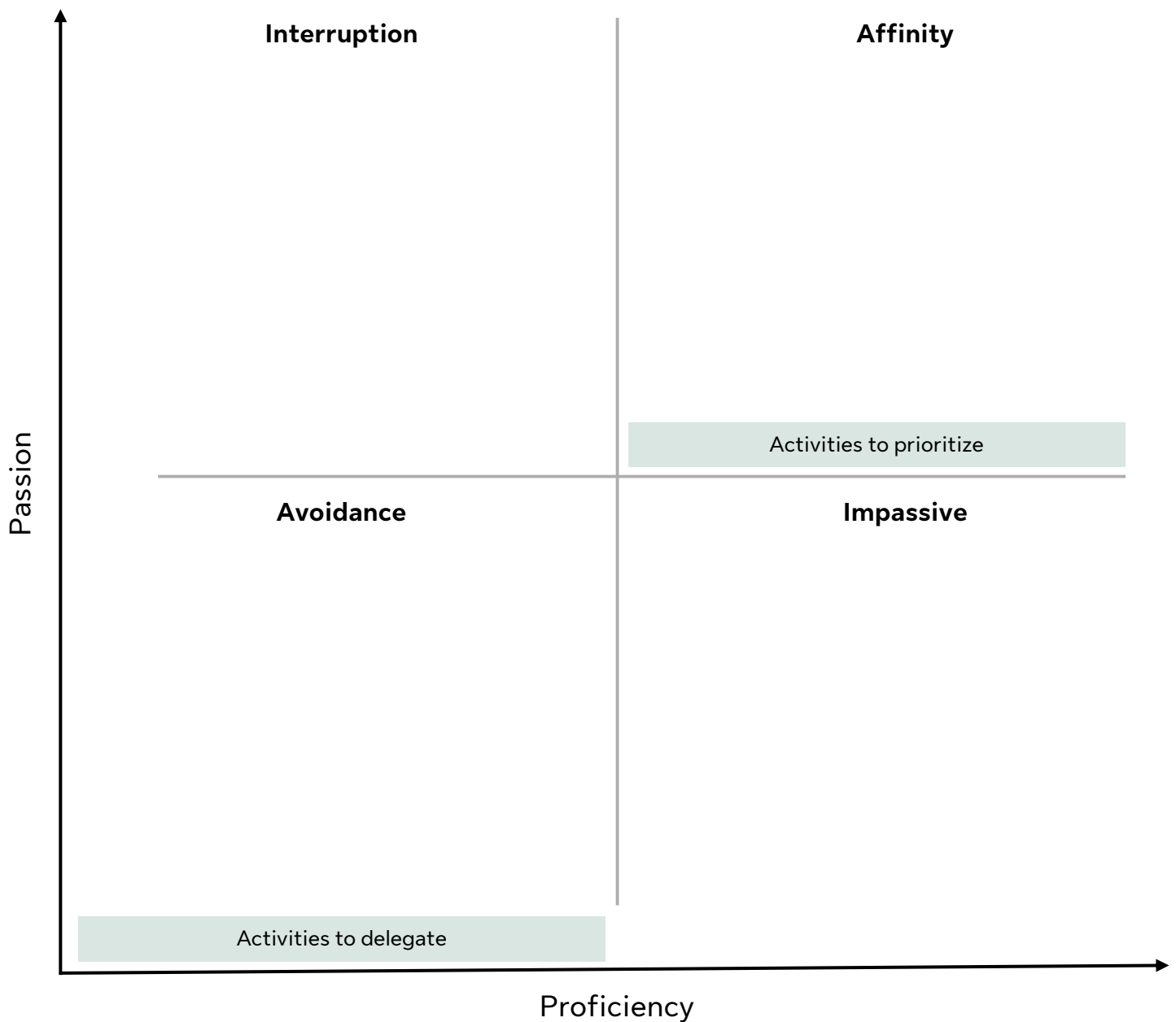
Activities that are enjoyable but use up too much capacity.

Affinity Zone

Productive, enjoyable activities that provide a feeling of accomplishment.

Impassive Zone

Activities that you are competent in but don't find enjoyable.



Let's assess

1. Where are you spending most of your time?
2. Does your focus make sense given what your time is worth?
3. What activities will you de-prioritize or delegate?

Step 3: Create a blueprint of your ideal work week

After assessing how you're currently using your time, decide how you want to allocate your time going forward.

Decide

- Go back to Step 1 and record the ideal number of hours you'd like to spend per week on activities you're responsible for.
- Consider your desired weekly work hours and decide what can be delegated or de-prioritized.

Draft

- Use the template on the next page to map out your daily schedule, envisioning your ideal week.
- Once the activities you're responsible for have been added, use the remaining time to enhance your service with top clients.
- Consider blocking off periods of free time, focus time and buffer time as needed.

Implement

- Transfer your ideal week to your calendar and colour-code activities by category.
- Review your calendar regularly with your team.
- Adjust as needed.

	Monday	Tuesday	Wednesday	Thursday	Friday
Morning					
Afternoon					
Evening					

Congratulations!

You're on the path to reclaiming your time and prioritizing your highest value activities.

Remember, while all business activities are necessary, it's crucial that you prioritize the right time on the right activities to exceed clients' expectations and achieve business growth.

