



6 Essential Steps For Financial Service Professionals When They Are Feeling Overwhelmed

Getting Out Of Overwhelm is crucial to building a strong foundation for your business. Otherwise, your dedication to Strategic Planning, Financial Modeling, Client Management, Sales & Marketing, Staff & Team, Thought Leadership and Time Management will falter and ultimately fail.

In order to Get Out of Overwhelm, you need to organize your ideas, projects, and tasks and then prioritize. To do this, I strongly recommend that you make a commitment to Empty Your Mind at the end of every day. If you can't do this daily, make sure to Empty Your Mind at the end of each week. You must do this so that you can regain your clarity, focus and inspiration.

The following is the process I use utilizing Microsoft Excel.

1. Label Column A "To Do" but understand that it's more than that. Go down Column A, line by line, and type in every single idea, project, task and "To Do" that comes to mind. Empty your mind and fill the column. Review the following areas (or others you may have) to ensure you capture everything:

- a) Business plan
- b) Documents created in the last week in Excel, Mind Genius, Word etc.
- c) E-Mail – incoming
- d) Files
- e) Loose paper notes on your desk (Tip: file them at the same time.)
- f) Notes in your journal
- g) Maximizer or Outlook or the CRM system that you are using
- h) Open documents on the computer desk top
- i) Smartphone notes
- j) Sticky notes, if you use them – I don't

Ask yourself what other project areas come to mind and add them to this list in Column A.

- a) Administration
- b) Computers / systems
- c) Customer service
- d) Financial
- e) Marketing
- f) Office management
- g) Planning
- h) Product development
- i) Production

- j) Sales
- k) Team building
- l) Training

You can also include areas for your personal life:

- a) Auto
- b) Clothing
- c) Home
- d) Health
- e) Hobby
- f) Intellectual
- g) Relationships (family, friends, spouse)
- h) Spirituality

The result will look something like this:

	A	B	C	D
1	To Do			
2				
3	complete the referral campaign articles			
4	list all project deadlines for the end of the month as we are leaving on holidays			
5	continue to remember to drink 4 to 6 glasses of water a day			
6	practice conscious eating and reduce meal size			
7	write a plan to delegate blogging			
8	advise virtual assistant the date to publish July 2012 newsletter in the blog			
9	upgrade Dragon dictation to version 11.5 and learn to use iPhone as a microphone			
10	send Adrien Brody quote to virtual assistant for posting and blog			
11	start project to become a speaker at Advocis schools in 2013			
12	e-mail John Doe client my travel agenda for Boise Idaho			
13	confirm that John Doe client has received their values and behaviors assessment			
14	post John Doe client's mutual fund assistant ad on For Advisors Only			
15	secure Wi-Fi for tradeshow booth in Las Vegas			
16	update budget cash flow document at the end of the month			
17	update One Page Business Plan at the end of the month			
18	purchased Dragon dictation for Laura			
19	write Tweets for July 23-August 3			
20	write August newsletter			
21	practice September Las Vegas speaking presentations for Insurance Network America and Pro-Seminars			
22	write financial advisor speaking campaign			
23	prepare for coaching calls a day in advance			

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2. Now, label Column B “Category” and proceed down your list assigning a category to each idea, project, task and “To Do” you captured in Column A. Start with these categories but add any others that you need.

- | | |
|------------------------|--|
| a) Administration | k) Team building |
| b) Computers / systems | l) Training |
| c) Customer service | m) Auto |
| d) Financial | n) Clothing |
| e) Marketing | o) Home |
| f) Office management | p) Health |
| g) Planning | q) Hobby |
| h) Product development | r) Intellectual |
| i) Production | s) Relationships (family, friends, spouse) |
| j) Sales | t) Spirituality |

	A	B	C	D
1	To Do	Category		
2				
3	complete the referral campaign articles	Marketing		
4	list all project deadlines for the end of the month as we are leaving on holidays	Planning		
5	continue to remember to drink 4 to 6 glasses of water a day	Health		
6	practice conscious eating and reduce meal size	Health		
7	write a plan to delegate blogging	Marketing		
8	advise virtual assistant the date to publish July 2012 newsletter in the blog	Marketing		
9	upgrade Dragon dictation to version 11.5 and learn to use iPhone as a microphone	Computers/systems		
10	send Adrien Brody quote to virtual assistant for posting and blog	Marketing		
11	start project to become a speaker at Advocis schools in 2013	Sales		
12	e-mail John Doe client my travel agenda for Boise Idaho	Customer service		
13	confirm that John Doe client has received their values and behaviors assessment	Customer service		
14	post John Doe client's mutual fund assistant ad on For Advisors Only	Customer service		
15	secure Wi-Fi for tradeshow booth in Las Vegas	Marketing		
16	update budget cash flow document at the end of the month	Financial		
17	update One Page Business Plan at the end of the month	Planning		
18	purchased Dragon dictation for Laura	Computers/systems		
19	write Tweets for July 23-August 3	Marketing		
20	write August newsletter	Marketing		
21	practice September Las Vegas speaking presentations for Insurance Network America and Pro-Seminars	Marketing		
22	write financial advisor speaking campaign	Marketing		
23	prepare for coaching calls a day in advance	Customer service		
24				

3. Next you will sort the spreadsheet alphabetically by Category (Column B) so the ideas, projects, tasks and “To-Dos” are grouped together accordingly.
4. Label Column C “Priorities.” Go down the list again, this time deciding the priority level of each item using A, B, C. If something has a particular due date, make note of it in Column D.

Now you will have something similar to this:

	A	B	C	D	E	F
1	To Do	Category	Priorities	Date		
2						
3	purchased Dragon dictation for Laura	Computers/systems				
4	upgrade Dragon dictation to version 11.5 and learn to use iPhone as a microphone	Computers/systems				
5	confirm that John Doe client has received their values and behaviors assessment	Customer service	A	23-Jul-12		
6	e-mail John Doe client my travel agenda for Boise Idaho	Customer service	A			
7	post John Doe client's mutual fund assistant ad on For Advisors Only	Customer service	A			
8	prepare for coaching calls a day in advance	Customer service	A			
9	update budget cash flow document at the end of the month	Financial	B	30-Jul-12		
10	continue to remember to drink 4 to 6 glasses of water a day	Health				
11	practice conscious eating and reduce meal size	Health				
12	advise virtual assistant the date to publish July 2012 newsletter in the blog	Marketing	A	23-Jul-12		
13	complete the referral campaign articles	Marketing				
14	practice September Las Vegas speaking presentations for Insurance Network America	Marketing				
15	secure Wi-Fi for tradeshow booth in Las Vegas	Marketing	A			
16	send Adrien Brody quote to virtual assistant for posting and blog	Marketing	A			
17	write a plan to delegate blogging	Marketing				
18	write August newsletter	Marketing				
19	write financial advisor speaking campaign	Marketing				
20	write Tweets for July 23-August 3	Marketing	A	23-Jul-12		
21	list all project deadlines for the end of the month as we are leaving on holidays	Planning				
22	update One Page Business Plan at the end of the month	Planning	B	30-Jul-12		
23	start project to become a speaker at Advocis schools in 2013	Sales	B	1-Oct-12		

5. Column E should be labelled “Delegate.” In this column, identify which tasks can be delegated and to whom. Be sure to schedule a meeting or conversation with this person or team so that you can provide thorough instructions for its completion.
6. Finally, sort the spreadsheet by “Priorities.” Schedule your A Priorities so that you can take action in the morning when you are fresh and ready to go!

The end result will look like this:

	A	B	C	D	E	F
1	To Do	Category	Priorities	Date	Delegate	
2						
3	confirm that John Doe client has received their values and behaviors assessment	Customer service	A	23-Jul-12	Delegate	
4	e-mail John Doe client my travel agenda for Boise Idaho	Customer service	A		Delegate	
5	post John Doe client's mutual fund assistant ad on For Advisors Only	Customer service	A			
6	prepare for coaching calls a day in advance	Customer service	A			
7	advise virtual assistant the date to publish July 2012 newsletter in the blog	Marketing	A	23-Jul-12	Delegate	
8	write Tweets for July 23-August 3	Marketing	A	23-Jul-12		
9	secure Wi-Fi for tradeshow booth in Las Vegas	Marketing	A		Delegate	
10	send Adrien Brody quote to virtual assistant for posting and blog	Marketing	A		Delegate	
11	update budget cash flow document at the end of the month	Financial	B	30-Jul-12		
12	update One Page Business Plan at the end of the month	Planning	B	30-Jul-12		
13	start project to become a speaker at Advocis schools in 2013	Sales	B	1-Oct-12		
14	purchased Dragon dictation for Laura	Computers/systems				
15	upgrade Dragon dictation to version 11.5 and learn to use iPhone as a microphone	Computers/systems				
16	continue to remember to drink 4 to 6 glasses of water a day	Health				
17	practice conscious eating and reduce meal size	Health				
18	complete the referral campaign articles	Marketing				
19	practice September Las Vegas speaking presentations for Insurance Network America	Marketing				
20	write a plan to delegate blogging	Marketing				
21	write August newsletter	Marketing				
22	write financial advisor speaking campaign	Marketing				
23	list all project deadlines for the end of the month as we are leaving on holidays	Planning				

Each time you complete this Empty Your Mind process, you will use the same spreadsheet or document and just continue adding to the list. When you complete a task, delete it.

Here's a bonus tip for you: You can scan your Empty Your Mind list and identify what you don't love to do or don't do well. If this is a recurring task, consider permanently delegating it to someone else on your team. If you don't have someone readily available, find someone. This alone will free up hours of your time and mounds of energy.

This process is the equivalent of a "brain dump." I imagine that you could do the Empty Your Mind process in a number of different ways, so I strongly suggesting finding the one that works best for you. The idea here is to take the time to stop thinking and start emptying so that you can *resume being*.

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