

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 incomina
 - d) Files
 - e) Loose paper notes on your desk (Tip: file them at the same time.)
 - f) Notes in your journal
 - a) Maximizer or Outlook or the CRM system that you are using
 - h) Open documents on the computer desk top
 - i) Smartphone notes
 - 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) Marketina
- f) Office management
- g) Planning
- h) Product development
- i) Production

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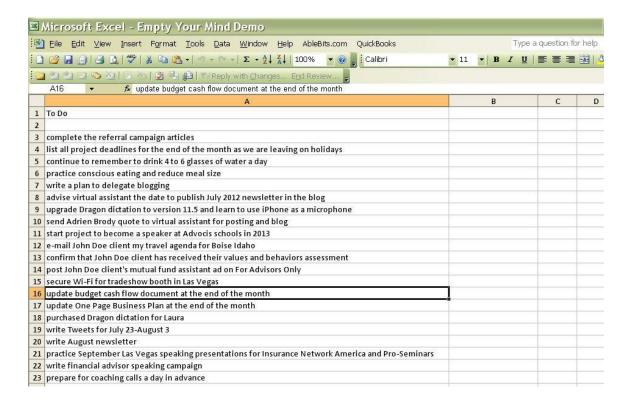
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- j) Sales
- k) Team building
- I) Training

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:



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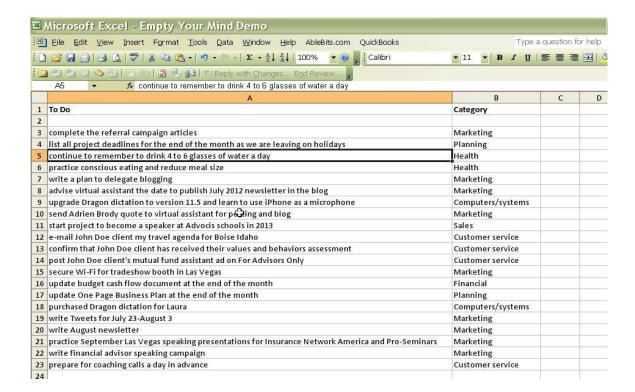
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- 2. Now, label Column B "Category" and proceed down your list assigning a category to each idea, project, task and "To Do" you captured in Column A. Start with these categories but add any others that you need.
 - a) Administration
 - b) Computers / systems
 - c) Customer service
 - d) Financial
 - e) Marketing
 - f) Office management
 - g) Planning
 - h) Product development
 - i) Production
 - j) Sales

- k) Team building
- I) Training
- m) Auto
- n) Clothing
- o) Home
- p) Health
- q) Hobby
- r) Intellectual
- s) Relationships (family, friends, spouse)

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t) Spirituality

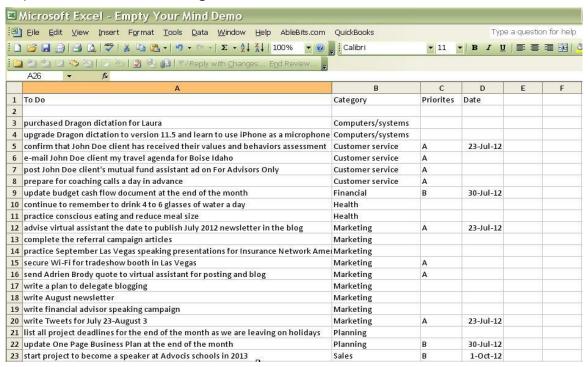


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- 3. Next you will sort the spreadsheet alphabetically by Category (Column B) so the ideas, projects, tasks and "To-Dos" are grouped together accordingly.
- 4. Label Column C "Priorities." Go down the list again, this time deciding the priority level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

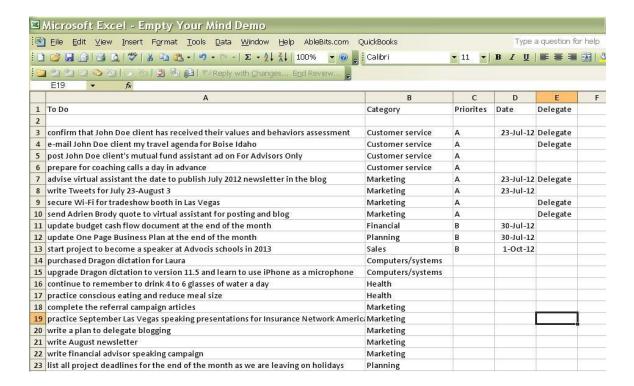
Now you will have something similar to this:



- 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!

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The end result will look like this:



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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