



Time Basics, Bandits, and Bonuses Resource Guide

7 Time Management Basics

1. Plan Your Day

Getting Out Of Overwhelm and Decision Fatigue will set the stage to make a list of everything you have to do every day.

Prioritize the list into A's, B's, and C's .

Do the most important things first, the second most important things second, the third things third.

2. Do Your ABC's

A's are the things that you must do today

B's are the things that you would like to do today

C's are the things that are not essential for you to do today

3. Check in every 15 minutes

To make sure that you are on track, every 15 minutes ask yourself; "Is what I am doing right now taking action towards the intended outcome of my goal?"

Some people go so far as to set an alarm on their watch or computer to keep them on track.

If the answer to the question is no then"

- Stop doing it
- Find someone else to do it
- Record it on a list to schedule for future action
- Forget it

4. Form The Habit Of Allowing 5 to 15 Minutes To Review Your To-Do List

They say it takes 21 days to break a bad habit. What if, for the next 21 days, you formed the habit of allowing yourself 5 to 15 minutes at the beginning of your day, every single day, to review your list - add to it, subtract from it, and re-prioritize it?

Dedicate 5 to 15 minutes to;

- Make your to-do list
- Prioritize it into A's, B's, and C's
- Estimate the time to complete each to-do
- Schedule the to-do in your diary
- Complete the to-do

5. Use A Week At A Glance 24/7 Diary

For me personally, I find that I like to be able to view my schedule for the entire week. All I have to do is review my to-do list, prioritize it, estimate the time and schedule the time into my Week At A Glance 24/7 Diary. You can download a copy of the Week At a Glance 24/7 Worksheet.

6. Start Time Blocking

With your newfound time awareness in mind and taking your priority activities into consideration, start to schedule your major activities into the highest energy, productive parts of your day. For me, early mornings are my best and that is when I write my e-newsletter. Take a look at all the similar activities that you do and group them into time blocks. For me the e-newsletter falls into the category of writing so this includes; website edits and additions, e-newsletters, blog and product development. You can start to time block your e-mails and phone time together. What about errands? How about meetings so that you block them into time when you are out of the office. What about e-mailing people that you have to have a meeting with and requesting a telephone meeting and letting them know that you can talk with them on the phone at either 3pm or 5pm? The key here is that you will be empowered because you will be in charge of your time.

7. Time Block Free, Buffer & Focus Days

Some say that Dan Sullivan from Strategic Coach invented Free, Buffer & Focus Days, some say that Wayne Cotton from Cotton Systems invented Free, Buffer & Focus Days and some say that Free, Buffer & Focus Days are from the Bible.

I've been using Free, Buffer & Focus Days for years.

- Free Days – time off/not working
- Buffer Days – working on the business, no client appointments
- Focus Days – working in the business, client appointments

In the past:

- My weeks #1 and #3 had Monday as a Buffer Day working on business leadership and management and Tuesday – Friday as Focus Days for client appointments. Please see the image below, click to enlarge it.



Free Days, Buffer Days & Focus Days Schedule

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
7:00 am	Buffer						
8:15 am		Focus					
9:30 am							
10:45 am							
12:00 noon	Free						
1:15 pm							
2:30 pm							
3:45 pm							
5:00 pm							
6:00 pm							
7:00 pm							
8:00 pm							

- My weeks #2 and #4 have Monday as a Buffer Day working on business leadership and management, Tuesday – Wednesday as Buffer Days working on creation of articles & speaking presentations and Thursday – Friday as Focus Days for client appointments.
- My Focus Days for client appointments time slots have been 7:00 am*, 8:15 am, 9:30 am, 10:45 am, 1:15 pm, 2:30 pm and 3:45 pm.

*Over the last couple of years, I've dropped the 7:00 am slot.

The 7 Time Bandits That Financial Services Professionals Must Defeat to Create More Balance, Space, Time and Income

1. Eliminate Busy Work

People are often too busy with busy work and this creates a huge distraction from paying attention and focusing on goal achieving actions.

Instead of taking action on their specific goal at a specified time they fill their time with what they justify as things that are routine versus what is important.

What they are saying is "I haven't created the discipline of stopping myself periodically throughout the day and asking if this is the most effective way to spend my time."

This is the time to get one of those alarms on your watch or computer to keep you on track when you have made a decision to work on a specific goal at a certain time.

If you get distracted;

- Stop doing it
- Find someone else to do it
- Record it on a list to schedule for future action
- Forget it

2. Schedule Time In Advance and Ask What Is Going To Distract Me?

It is that time of the week again and it is coming time to write my newsletter. In fact the time is scheduled. Well in advance I ask myself, "Is there anything that I need to do that is going to distract me from writing the e-newsletter?"

A variation of the above is:

- Record it on a list to schedule for future action
- Find someone else to do it
- Stop doing it
- Forget it

You will find that as you get more and more into the habit of focusing on action steps towards your goals, the minor things will not be that important anymore. I think that it was Tony Robbins that said, "People major in minor things."

3. Form Time Boundaries

Your Associates, Employees, Family, Friends & Partners Time Management Part 1

As a business owner, I am fortunate enough to be in charge of my own time and it is not that often that I must accommodate the schedule of others.

There are many of us that are not totally in charge of our own time and we are accountable to; partners, associates, employers, family members and friends.

We are often interrupted by other people's priorities.

The next time that you are interrupted by someone making a request for you to do something;

Ask yourself (not them), is this life and death? If the answer is Yes then take action. If the answer is No then I suggest the following.

Person Requesting You To Do Something: I want your help to do

_____.

Your Reply: I am happy to help you, right now I'm in the middle of a project and need 100% concentration to complete it. I am unable to stop what I am doing as I have an unavoidable time commitment. What is the deadline?

(You may find that by forming a boundary on your time the person that is making a request may realize that you are busy with something that is more important than what it is they are asking you to do. If the person replies with the deadline, then let's assume that they still want your help.)

Person Requesting You To Do Something: I need it by 10 am tomorrow.

Your Reply: Great I'll schedule it in for tomorrow morning and I'll have it ready for you.

(This simple system leaves you with time boundaries and gives you the feeling that you are in charge of your own time versus being a victim.)

Your Associates, Employees, Family, Friends & Partners Time Management Part 2

Some of you are business owners and less accountable to; partners, associates, employees, family members and friends.

At the same time, we would like our partners, associates, employees, family members and friends, to join us in accomplishing our success.

Complete your vision for the next three to five years and create your business plan.

Next, share and explain your three to five year vision and your business plan with your partners, associates, employees, family members and friends along with your Free, Buffer & Focus Days Plan.

Ask them, would they be willing to help you.

Of course they will say yes.

Let them know that while you have been more available in the past, you are really committed to your three to five year vision and your business plan, so you are looking for their help and understanding in the event that they ask you for help and you say; I am happy to help you, right now I'm in the middle of a project and need 100% concentration to complete it. I am unable to stop what I am doing as I have an unavoidable time commitment. You know the rest.

What is the deadline that you need your task done by?

4. Block Time For High Net Worth Clients

You can take this one more step by sharing and explaining your three to five year vision and your business plan along with your Free, Buffer & Focus Days Plan, especially with team members / employees.

Start off this conversation and complement each team member on what they are doing exceptionally well.

Ask them for their help which will enable you to create more time to make the center of influence calls that you need to make to make the practice more prosperous.

Explain to them that your best time for making calls to center of influence prospects is in the morning, so what you are wanting to do is figure out a way to gain their help to create some block time so that you can make center of influence prospect calls in the morning.

Ask them to start planning their next day at 3 PM in the afternoon and have them think about both the A & B priority questions that they are going to need to ask you first thing in the morning to enable them to proceed with their work day.

Let them know that you are going to have an open door policy between 8 and 8:30 AM in the morning to be able to answer only A priority questions that will only take a few minutes to answer.

Explain that the B priority questions, the questions that will take more than a few minutes to answer, can wait until your 11 AM time slot when you have more time available.

Explain this process will give you a block time slot between 9 and 11 AM to make center of influence prospect calls and work on high net worth files and A priority projects while your morning energy is still strong.

5. Blocking Out Disruption Don & Donna

In preparation for Don & Donna, prepare the following;

- In the olden days, they has these large faced clocks with the sweeping, second hand. Put one of these clocks up on the wall on either the right or left hand wall at the side of your desk.
- Create a Sign that says Block Time and put it on your locked office door during your Block Time.
- Have a journal and pen at the ready on your desk.
- You have had the meeting about your three to five year vision and your business plan with your partners, associates, employees, family members and friends along with your Free, Buffer & Focus Days Plan.

- And then there is always Disruption Don & Donna. Tap, tap, tap, email, email, email, ring, ring, ring ... this will only take a second.
- Your reply;
 - Remember the meeting that I had about my three to five year vision, business plan and Free, Buffer & Focus Days Plan.
 - Ask Don or Donna if they have heard of the Harvard Study that came to the conclusion, that when a person gets interrupted, it takes twenty minutes to regain their focus especially if they are on Block Time.
 - Don or Donna, I am not answering your question right now and I'm asking you to find another way to get what you require. Please remember that I am open to talk with you about A priorities between 8 and 8:30 am or at an 11 AM time slot when I have more time available.
 - Thank you.

Blocking Out Disruption Don & Donna When You Forgot To Lock Your Door During Block Time

- This will just take a second.
- Taking your eyes off the person, looking at the clock, there are no seconds only a ton of minutes and I am on Block Time right now.
- Stand up, walk out of your office along with the person and close the door.

You might say, that's rude. Note when you have explained three to five year vision, business plan and Free, Buffer & Focus Days Plan. You have to kick at your time management system until it bleeds daylight.

6. Blocking Out Calamity Client That Never Has An Appointment When You Forgot To Lock Your Door During Block Time

- This will just take a second.
- Taking your eyes off the person, looking at the clock, stand up, walk to meet them near your office door, before they sit down.
- Say, "how can I help" with your journal and pen in hand.
- While making notes, explain that you have an unavoidable commitment with a pressing scheduled appointment that you are preparing for.
- Let Calamity Client know that you understand exactly what they need.
- Explain that you cannot deal with it right now.
- Ask them when do they need it by?
- Walking out of your office along with the person and thank them for the opportunity to be of service.

Dear Beloved Calamity Client

Thank you for the opportunity to work with you as an advisor to help you to create a plan, to grow assets, protect assets, and to leave a legacy.

As you know, the world in general is becoming more and more complex and this goes the same for working with you to create a plan, to grow assets, protect assets, and to leave a legacy.

In order to provide you with the best service possible in relationship to products and services like:

- A
- B
- C

Please note that we require 72 – 96 hours of advanced notice to provide you with the best service possible.

For phone calls and emails that require a simple yes or no answer, or a simple answer, we will respond to those the same day.

Please note that for detailed queries regarding your account, we again are going to require 48 to 72 hours to respond.

In order to provide you with the best service, we would also like you to understand that we are no longer doing appointments on Monday or Friday Afternoons. The reason why is, because we are using Mondays to prepare cases and files for the week so that we're ready for appointments on Tuesdays to Friday mornings.

Thank you for your understanding.

Strong Boundary Advisor

7. Aggressive High New Worth Andy

I suggest that you send the above letter out from time to time in the form a card, letter and postcard to get the message out.

Even though you have sent the above card, letter or postcard Aggressive High New Worth Andy is always going to show up on Monday morning without an appointment expecting to see you.

This is where your values are going to be tested by your unmet needs of; approval, control, perfection, recognition, safety, worthiness are all going to be tested. Remember, there is no client that is going to meet your unmet needs that fuel negative emotions and negative beliefs; unmet needs must be met from within. THIS IS AN EXAMPLE OF PLANTING THE SEEDS.

This is where you have to be really aware of Time Bandits and have Strong Time Boundaries and you must give your team members the language to deal with Aggressive High New Worth Andy:

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Aggressive High New Worth Andy: Is _____ in?

Team Member: Yes they are and they are not available for an appointment; I can schedule you in for _____ or _____.

Aggressive High New Worth Andy: This will just take a second.

Team Member: Strong Boundary Advisor is not available for an appointment. What can I help you with? If you give me the exact details, Strong Boundary Advisor will look after you by the end of the day. Thank you for understanding. (Team Member Stands Up) What can I help you with? If you give me the exact details, I will see that you are taken care of.

3 Time Bonuses

1. You Say You Have No Time; Then Where Is Your Time Going?

To answer the question of where is your time going, start tracking and logging your time daily for a least a week. Track your time by writing down the exact time that you begin each activity, write a few words about what the activity is about and write down the exact time that you end each activity. I suggest that you write down everything. If you begin an activity and in the middle of it, you decide to answer e-mails or the telephone, then write down the exact time that you began and ended the e-mails or the telephone calls. This requires you to be 100% honest about what you are spending your time on. If you take 8 minutes to make a cup of coffee then write down 8 minutes. Forget about being perfect writing down your time in 15 minute increments.

2. Review and Summarize Your Time

At the end of the week, review your time records and summarize your activities and the amount of time spent on each. Create your activity categories and you can have from anywhere from 6 - 20 categories. They should be meaningful to you. Examples of Business categories are:

- Planning
- Administration
- Clients
- Computer
- Financing
- Marketing
- Office
- Product Development
- Sales
- Team
- Training

Examples of Personal categories are:

- Planning
- Auto
- Clothing
- Home
- Storage
- Financial
- Health
- Hobby
- Intellectual
- Family
- Friends
- Spouse
- Spirit
- Travel

Next summarize how much time you spent on each activity on a daily and weekly basis and determine the percentage of time that you are spending on each activity. The key is to become aware of where you are spending your time.

3. Your Daily Calendar / To Do List

I believe in writing out my daily calendar so that it is a page at a glance. There is something powerful about the written word. The power of the written word causes me to commit.

On an 8 1/2 by 11 sheet of paper I divide the page into 3 equal columns.

The first column is my daily schedule from 5 am - 10 pm to schedule the live and telephone appointments that I have committed to.

The second column is for what I must do that day. I group the activities into similar activities, estimate the time required and then schedule.

The third column is for what I would want to do that day. These are miscellaneous items that are still a priority that will only take a few minutes to follow up on. I often do these while traveling or waiting for appointments.

One thing to remember. Do not block out 100% of your time. Leave 1 - 2 hours of buffer time so that you can still handle those inevitable interruptions.

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