

# Advisor Productivity Tips

- 1 **Time is our only inelastic resource – use it well!**
- 2 Remember, a lead advisor/CEO's top three high-impact activities are:
  - » Nurturing top-tier client relationships,
  - » Soliciting new top-tier clients
  - » Developing and overseeing the execution of your strategic vision
- 3 Spend dedicated strategic thinking time – at least one uninterrupted (yes, completely uninterrupted) hour per month. Ideally, you would do your think time with pad and pen (no distracting electronic devices).
  - » Most people can't focus on high-quality think time in spaces that "call to us." Examples of distracting spaces are your home and office. Some people need absolute silence to think, like a reserved space in a library, while others just need to be isolated from noise that they have to pay attention to. A coffee shop might not be entirely quiet, but the noise can fade into the background.
  - » Strategic thinking time should be scheduled on your calendar and considered to be as important as a client meeting. You can add more time as you develop the tolerance, working up to one hour per week. Leaders who do this activity regularly are significantly more productive and focused than those who don't. A regular hour of think time helps many advisors save hours of wasted time by gaining absolute clarity on **what to do** and **what not to do**.
  - » Ask yourself, "What do I need to start doing, stop doing, and refine?" The answers will help you gain clarity on what to focus on and what to eliminate!
- 4 When you have a clear view of your highest value activities, make them a priority in your calendar. We have a tendency to put low-value busy work in important calendar slots. This leaves us with less than optimal time for key activities.
- 5 When you determine that you are spending too much time on low-value activities, use the 4 Ds of time management. Do a quick review of your activity, determining if you should:
  - » Do (stop wasting time thinking about something – just make a decision/get stuff done)
  - » Delete (does this **actually** need to be done?)
  - » Delegate (use 100 Items/can you outsource some personal stuff?)
  - » Defer (are these activities the most important to accomplishing your goals **now**? Or should they be put in the parking lot?)

- 6 Chunk activity time – don't multi-task. Put activity into discrete time blocks. Examples include:
  - » Email Handling
  - » Outgoing prospecting calls
  - » Case preparation
  - » Open office hours for answering team member questions
  - » Any other “chunkable” activities
  
- 7 Plan tomorrow's 6 most and vital 1 at the end of the day – not in the morning. If you wait until you are at your desk, you are likely to get derailed before you even start.
  
- 8 Control Distractions
  - » Organize your workspace
  - » Know how to use your technology – a big time waster is underutilization of technology
  - » Turn off notifications – email, text messages, etc.
  - » Use noise-canceling headphones
  - » Use a signal for your team to show when you can't be interrupted – like a door tag you may see at the doctor's office
  - » Remove apps from your phone that cause you to be distracted during the workday
  - » Create Outlook rules to have emails sent to specific folders as they come in – like blogs or other subscription base emails; use block time to check them
  
- 9 Invest in things that help you maximize your time:
  - » Hire a driver
  - » Hire a personal assistant
  - » Dictation software
  - » Calendaring software



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