

MASTER OF YOUR CRAFT



THE PERSONAL COACH

CONFIDENCE • FOCUS • FREEDOM

customized one-on-one business coaching for financial advisors

www.thepersonalcoach.ca

Beyond Time Management

Strategies to help you become
powerfully effective

For a copy of the tools in this presentation
email kelly@thepersonalcoach.ca

One Hour Consultation

Explore fit

Start building a relationship

Determine if coaching is for you

Help clarify vision, and

Determine next steps

Valued at \$500

Ideas & Action handout



COMPLIMENTARY CONSULTATION

Our Ideal Client

Established/Associated with One

Have achieved a level of success

Have at least one assistant

Feeling Overwhelmed

Diffused

Reactive versus proactive

Want more freedom

Would like to simplify

Growth oriented

My to do list

make kids' lunches, call plumber about garbage disposal, pay bills online, get a haircut, spend 20 minutes on treadmill, drop kids off at school, fill out a performance evaluation, take Molly to her ballet lesson, sign up for Pilates classes, interview job applicants, put air in exercise ball, make a costume for the school play, take recycling to curb, send birthday invitations, do laundry, clean house before the in-laws visit, take dog to vet, get a manicure, buy an anniversary present for Tom, make it to yoga class on Tuesday, carpool to soccer practice, finish the presentation, make client calls, clean off desk, get photos developed, pick up kids from school, clean paw prints off the door, schedule sales meeting, balance checkbook, walk the dog, read Molly's history report, place classified, ad, set appointment with VP, replace vacuum cleaner bag, play a game of hide-and-seek, drop off dry cleaning, get ink for the printer, iron my skirt, read an interesting article in a magazine, catch up on emails, drink a cappuccino, rummage through the attic for the ski gear, develop a winning strategy, go bowling, , finish my taxes, plan a dinner party, recaulk the bathtub, organize my MP3 library, live for today, mop the floors, brush the dog, attend a staff meeting, deadhead the roses, hope the baby goes to bed easily, get the junk out of the car, condition my hair, make small talk with other parents at T-Ball, read bedtime story, worry about a deadline, worry about the kids, worry about the house

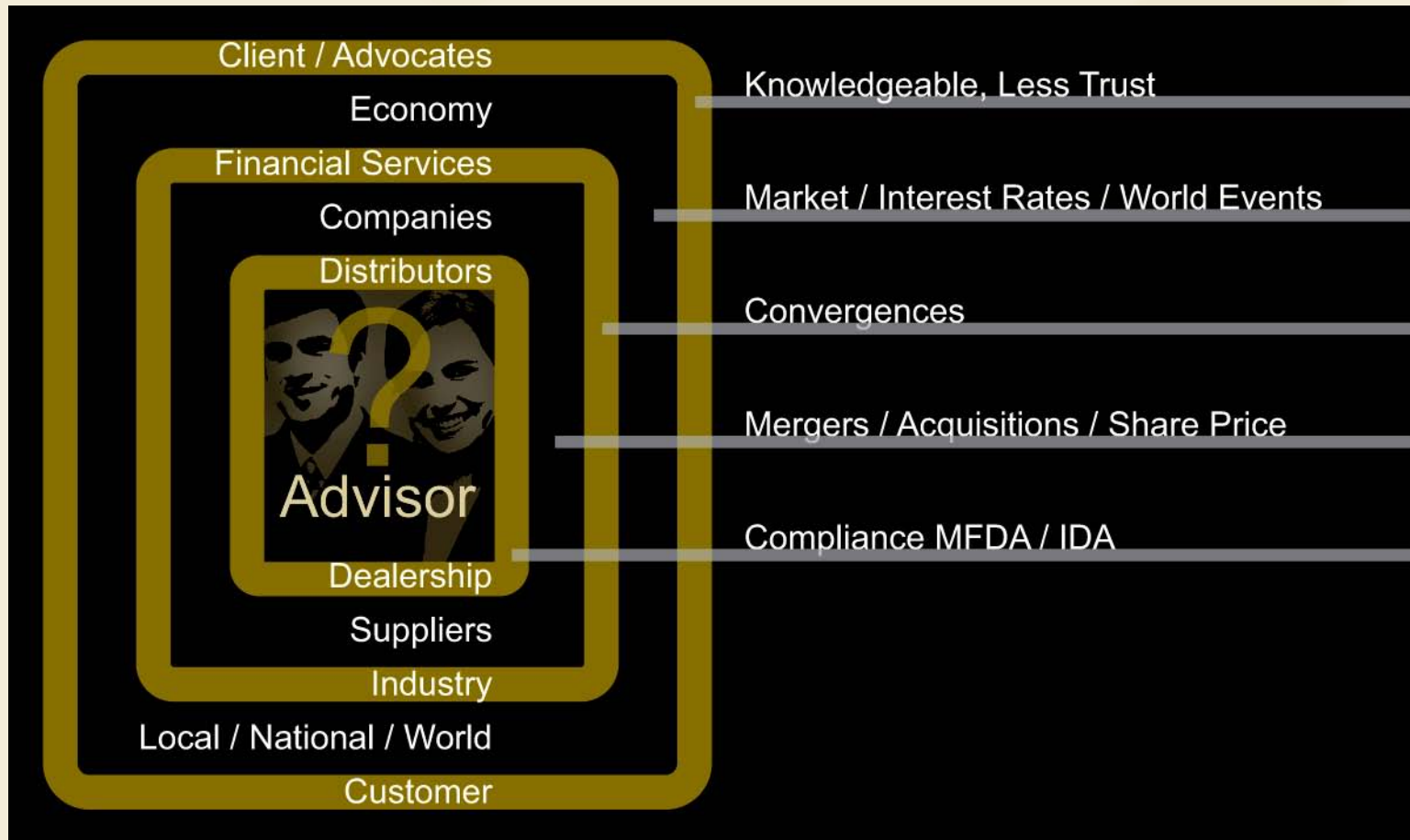
Outline

The Current Environment

Productivity Challenges

Keys to Personal Effectiveness

Action Steps

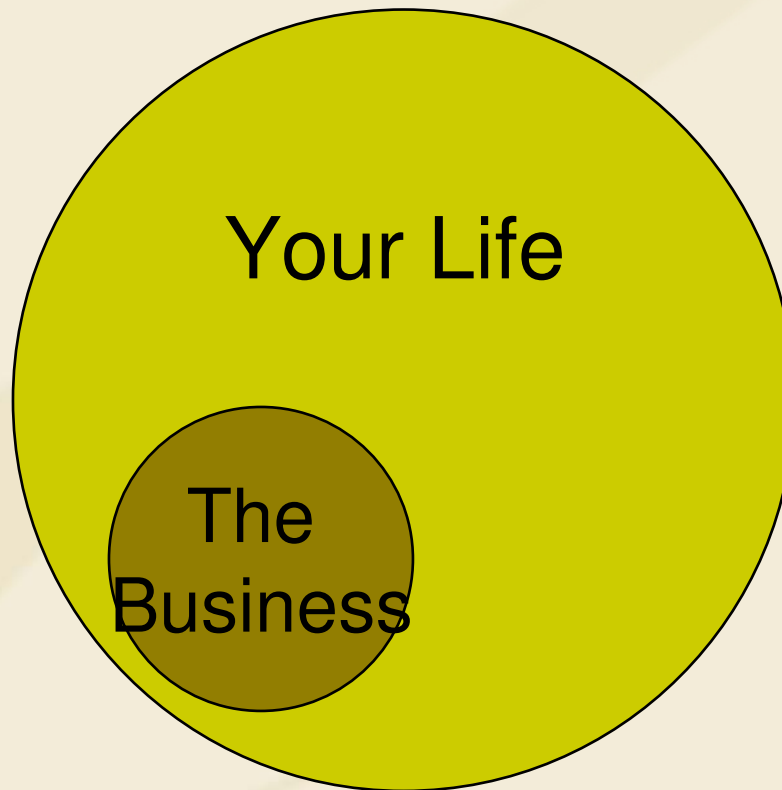




It feels like this...



It should be like this...





Time Management Challenges

Procrastination	43%
Admin/compliance	40%
Too much work	28%
Personal disorganization	27%
Competing personal goals	26%
Difficulty prioritizing	21%
Not wanting to delegate	16%



“No, not there, please. That’s where I’m going to put my head.”

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Keys to Productivity

Effectiveness vs. efficiency

Extreme self-care

Big rocks first

Play to your strengths

Clear Vision



Maximizing Me

How are you ensuring you are getting the best return on capital on your key asset?

		Importance	Score	
1.	My team and I have a clear understanding of my unique ability.	0 1 2 3 4 5	0 1 2 3 4 5	
2.	My team and I understand that "I only do what I can do."	0 1 2 3 4 5	0 1 2 3 4 5	
3.	Each person in my practice (including me) has defined areas of accountability, is skilled at their work and feels comfortable making decision within those areas.	0 1 2 3 4 5	0 1 2 3 4 5	
4.	I understand Dan Sullivan's concept of 'Free Time, Focus Time and Buffer Time' and I make use of this system to help me maintain a balanced life.	0 1 2 3 4 5	0 1 2 3 4 5	
5.	My team and I understand that if the firm is to move forward and be successful that I am to be focused on the right revenue producing activities.	0 1 2 3 4 5	0 1 2 3 4 5	

Total Gap

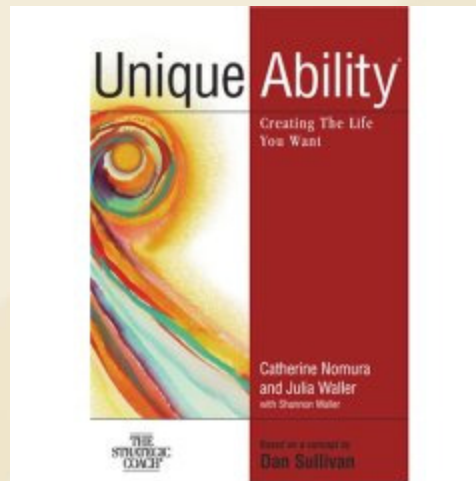
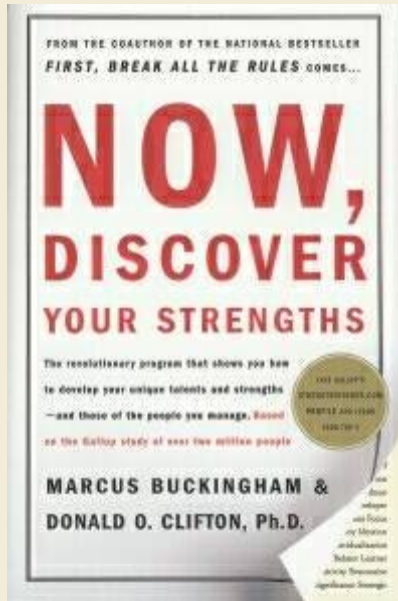


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Core Values









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*If you were meeting here 3 years from today -
and you were to look back over those 3 years
to today – what has to have happened during
that period, for you to feel happy about your
progress?*



Goal Study

Unwritten goals – 50%

Written Goals – 75%

Written goal + action commitments – 65%

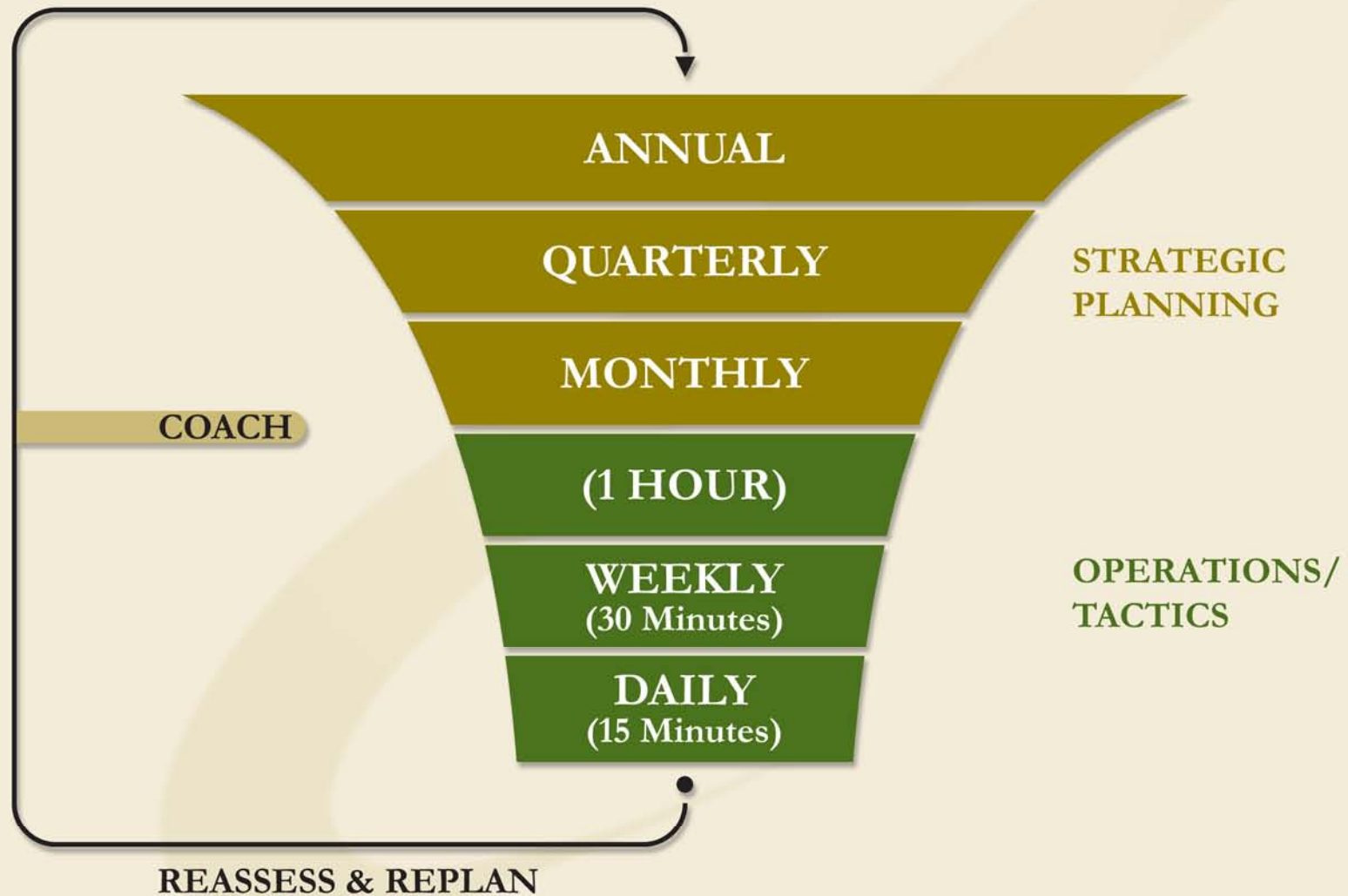
Written goal + action commitments to a friend
– 82%

Written goal + action commitments + progress
reports to a friend – 95%

7 Step Goal Setting

1. Decide what you want
2. Write it down
3. Set a deadline
4. Make a list of action items
5. Organize your list into a plan
6. Take Action!
7. Do something every day

PLANNING/MEETING FRAMEWORK



Efficiency



Personal

Structural

Did you spend at least 60% of your time last week in front of your clients?

Those advisors who spend 60% or more of their time with clients earn 3 times the amount of those spending 30-60% and 6 times those who spend less than 30%

Ask Yourself...

**What is the most valuable use of my
time right now?**

Most Productive Activities

Client Meetings

Meeting with Prospects

Creating new financial plans/portfolios

Reviewing existing portfolios

Identifying new prospects

Business planning

Professional development

Meeting with Centres of Influence

Calling clients re: changes to their portfolios

Preparing for client meetings



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Number 1 Tip

Do It Now!

Designate a time

Delegate it

Dump it

3 Questions

How long will it take?

What's the ROI?

When is the deadline?

Overcoming Procrastination

Break it down into smaller tasks

Slip in sideways

Do a fast and sloppy version

Focus on the payoff

Remember past successes

Set time limits

Choose the best time of day for you

Scheduling

	Average	More Efficient	Less Efficient
I have a very set schedule of meetings & tasks	22%	35%	0%
Loosely set schedule for meetings not tasks	55%	49%	68%
Complete flexibility	23%	17%	32%

90-DAY WONDER™

If you know what you want, you can say no to what you don't want.

FIRST QUARTER

TIME CODES	
 	BLUE SKY
 	MELLOW YELLOW

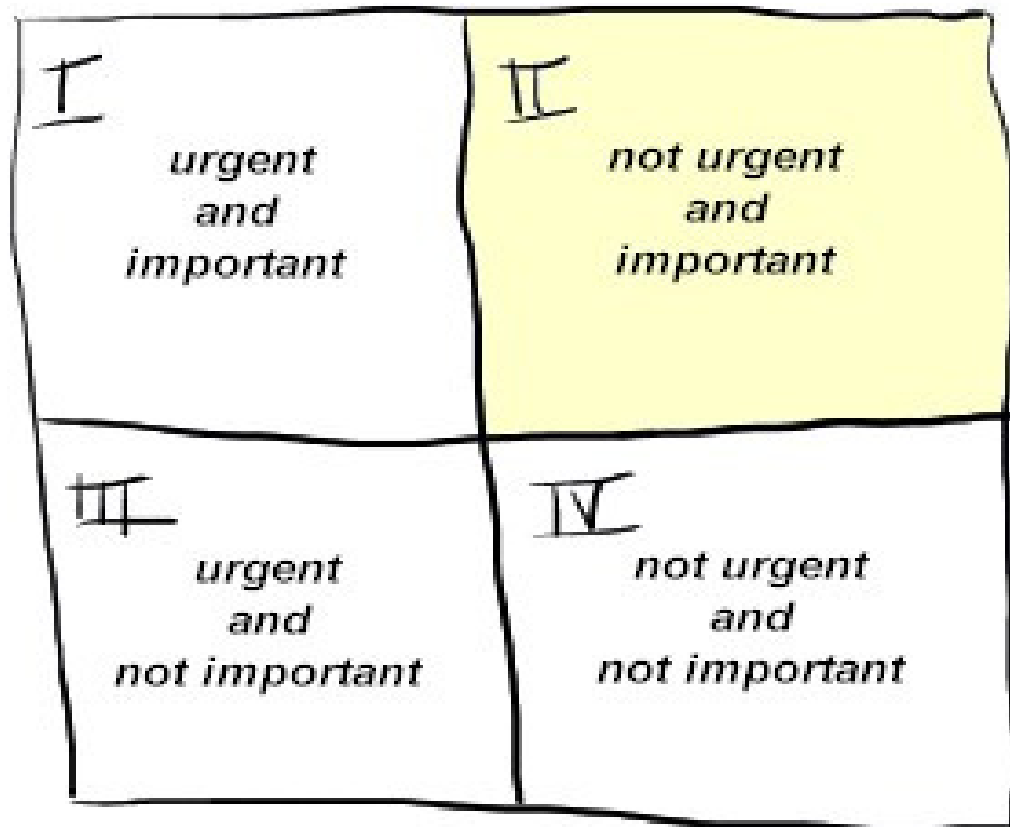
NAME **Bill Fletcher** PHONE _____

TIME CODES	
 	RED TAPE
 	GREEN MACHINE

90-DAY VISION							% OBJECTIVES %				
<p>I will have a high performance quarter. I will avoid diffusion and stay on track. I will have fun with Susan and the kids</p>							BLUE SKY				
							100	Performance Review			
							100	Assess Issues			
							100	Plan Quarter			
<p>NEW YEAR'S BREAK</p>							GREEN MACHINE				
							100	Learn New Program			
JANUARY	5	6	7	8	9	10	11	100	Do 25 BDPs		
	12	13	14	15	16	17	18	100	Send 240 Prestige Intros		
	19	20	21	22	23	24	25	100	Schedule 120 Previews		
	26	27	28	29	30	31	1	100	Complete 80 Viewpoints		
	2	3	4	5	6	7	8	100	Open 60 New Clients		
	9	10	11	12	13	14	15	100	Acquire 30 Clients		
	16	17	18	19	20	21	22	100	Generate \$30,000		
FEBRUARY	23	24	25	26	27	28	1	RED TAPE			
	2	3	4	5	6	7	8	100	Licence Project		
	9	10	11	12	13	14	15	100	2 CLU Courses		
	16	17	18	19	20	21	22	100	10 Online Classes		
	23	24	25	26	27	28	1	50	Clean up piles of files		
MARCH	2	3	4	5	6	7	8	50	Clean out database		
	9	10	11	12	13	14	15	MELLOW YELLOW			
	16	17	18	19	20	21	22	100	Susan 10 dates		
	23	24	25	26	27	28	29	100	Tuesday family time		
	30	31	FINISH MY COURSES						100	Exercise 60 times	
	FAMILY SKIING HOLIDAY								100	Lose 15 pounds	
							FINAL SCORE		%		

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Stephen Covey



	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday
	Blue Sky					
	Green Machine					
	Red Tape					
	Mellow Yellow					
9:00 AM	Cleaning up Reading To Do list Development	Workout	Paperwork Book Appts	Workout	Email, calls,	Workout
9:30 AM						
10:00 AM						
10:30 AM						
11:00 AM		Email, Calls		Email, Calls		
11:30 AM						
12:00 PM		Client Meeting		Client Meeting	Client Meeting	
12:30 PM						
1:00 PM						
1:30 PM		Client Meeting		Client Meeting	Client Meeting	
2:00 PM						
2:30 PM						
3:00 PM	Client Meeting	Client Meeting	Client Meeting			
3:30 PM						
4:00 PM						
4:30 PM	Client Meeting	Client Meeting	Plan for next week			
5:00 PM						
5:30 PM						



Scheduling Tips

Big rocks first

Use one calendar/to do list

Time blocking

Schedule enough time for projects

Combine personal and work items

Plan the next day the night before



Client Meetings

Find out the best time and way to reach clients

System to remind clients of meetings

Use an agenda & identify the goal

Use a letter of engagement

Book next meeting right there

Block time right after the meeting for
dictation/notes

Technology Tips

Never check your email in the morning

Do it now!

Turn off the auto notification

Get off lists for junk email

Set up a working folder for pending items

Blackberry

Learn how to use it

Delegate it

Reading

Tear out only the relevant articles

Team up – study groups, book reports

Executive book summaries

Books on tape in the car or gym

Unsubscribe

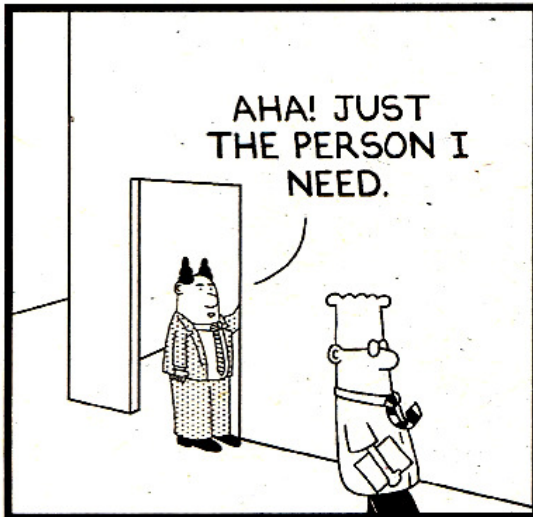
The Value of an Assistant

\$20 vs \$200
40 hour week
45 weeks per year

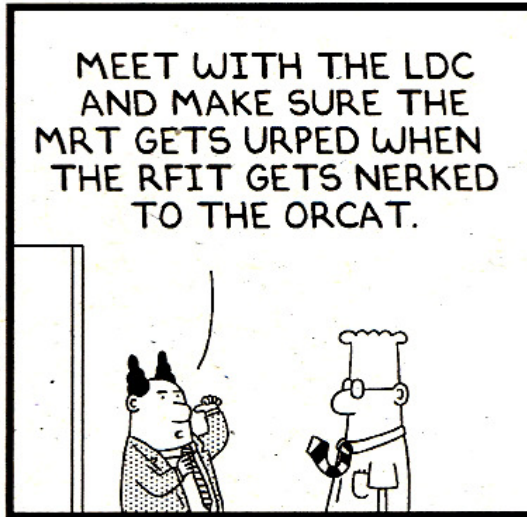
1	80% time \$20/hr. jobs	\$640	
	20% time X \$200/hr. jobs	\$1,600	
			\$2,240 X 45 = \$100,800
2	20% time X \$20/hr. jobs	\$160	
	80% time X \$200/hr. jobs	\$6,400	
			\$6,560 X 45 = <u>\$295,200</u>
			<u>\$194,400</u>

\$40,000 salary for MA

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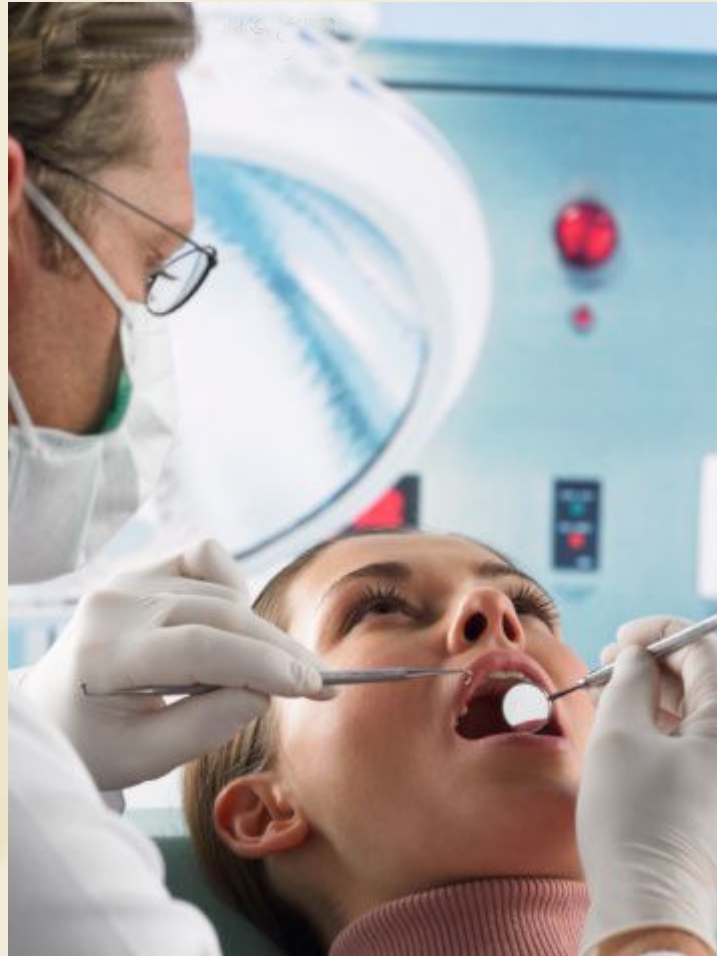


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Delegation Tips

Clear division of duties

Turn it back around if not done properly

Clear outcome; creative on how to

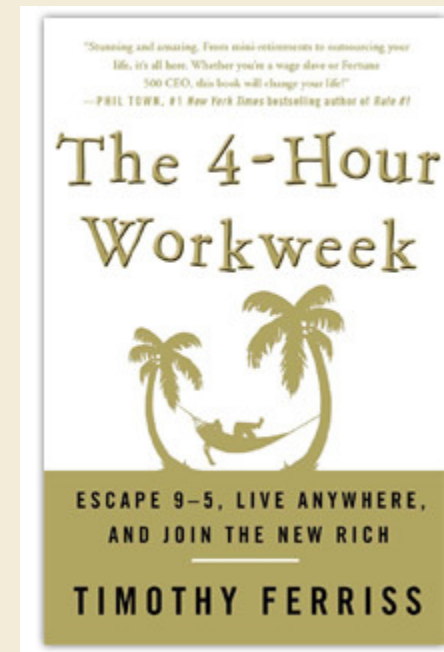
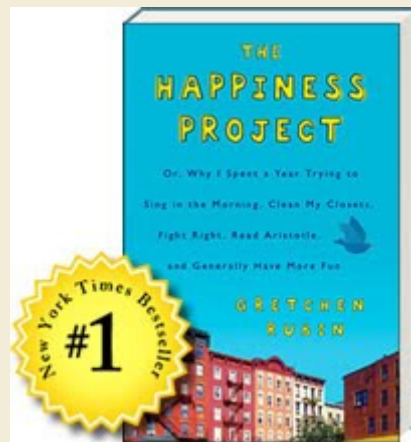
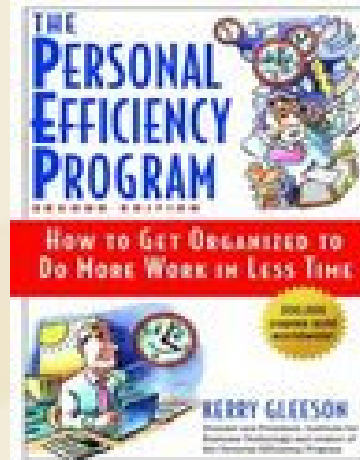
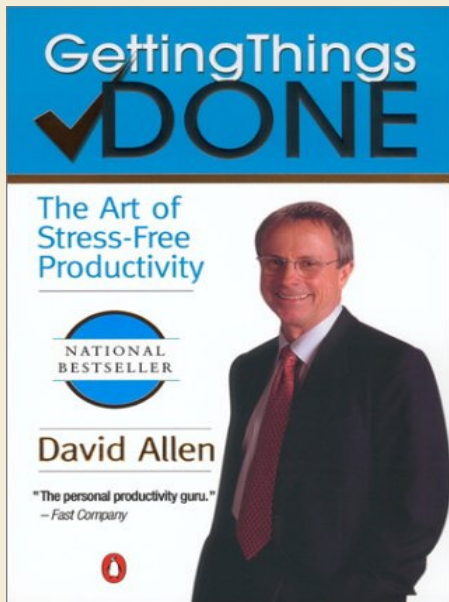
Things that drain your energy

Things you're not good at

Habit but not best use of your time

Action Steps

1. Extreme self-care
2. Re-visit your vision
3. Link your schedule to your vision
4. Clear up any backlog
5. Support systems



Benefits Of Working With A Coach

Clear Focus

Smarter Actions

Balanced Life

Better Decisions

More Money

Sustainable Energy

Increased Confidence

Thank You!

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