Important

Before you make any changes, we suggest you run this idea by your team. Tell them that you want to become more effective with your time and you need their help (it’s important to get their buy-in). If you get resistance, ask them if you can try this for at least 3 months. Then, if it doesn’t work, or if it causes problems for any member of the team, you can make adjustments as necessary. Once you get this buy-in, you should put this plan in writing and make sure everyone gets a copy.

Keep in mind that this is only a SAMPLE. You will need to adapt it to your particular business in a way that works for you and your team.

General Guidelines

1. You will see clients by appointment only (no exceptions).
2. You will not answer your own phone or take incoming phone calls (no exceptions). All callers will be told that you are in meetings and, if necessary, that you will return the call that afternoon (see below). Team member answering phone will make every effort to help caller to minimize returned calls for you. You may need to review how incoming calls are currently handled.
3. You will schedule specific times on selected afternoons to return calls that the other team members cannot handle. The caller will be told that you will return their call between these times.
4. You will only work in the office 3 days per week (see below). This will give your team plenty of time to get their work done without interruptions from you.
5. Every member of the team will be asked to identify specific opportunities to reduce workload. This includes all activities the team feels are unnecessary or redundant. Please ask each team member to start a list and turn it in to you at the end of next week.

Weekly Schedule

Mondays - OFFICE DAY
8 - 9AM Team Meetings - Current business issues, client-related, administrative, etc. (all team members)
9 - 10AM Investment Committee Meeting - General market / economic issues, PIM portfolios, managers, etc. (for appropriate team members only)
10 - 1PM Flexible time (try to be proactive, work on anything except returning calls)

Tuesdays - OFFICE DAY
8 - 12PM Client appointments - try to fill this time block with client appointments EVERY week (this includes portfolio reviews, new client presentations, etc.)
12 - 1PM Flexible time (use this time to process all work generated from morning appointments, have lunch, relax a bit)
1 - 3PM Client appointments - try to fill this time block with client appointments EVERY week (this includes portfolio reviews, new client presentations, etc.)
3 - 5PM Return calls, process work generated from afternoon appointments

Wednesdays - HOME-OFFICE DAY
8 - 12PM Flexible time (try to be proactive, work on anything except returning calls)
12 - 4PM Strategic planning - Work ON your business

Thursdays - OFFICE DAY
8 - 12PM Client appointments - try to fill this time block with client appointments EVERY week (this includes portfolio reviews, new client presentations, etc.)
12 - 1PM Flexible time (use this time to process all work generated from morning appointments, have lunch, relax a bit)
1 - 3PM Client appointments - try to fill this time block with client appointments EVERY week (this includes portfolio reviews, new client presentations, etc.)
3 - 5PM Return calls, process work generated from afternoon appointments

Fridays - REFERRAL BUILDER DAY
8 - 9:30AM PAC* Meeting (at the advisor’s office)
10 - 11:30AM PAC* Meeting (at the advisor’s office)
12:00 - 2:00PM CRC* Meeting (lunch with a key client at their favorite restaurant)
2:00 - end of day Take the rest of the day off - play golf with friends or clients, spend time with family, etc.

*PAC: Professional Advisor Campaign, CRC: Client Referral Campaign, are components of The Referral Builder.