

HANDOUTS: PRACTICAL TIME MANAGEMENT SOLUTIONS

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FAMILY
ESTATE
PLANNING
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Productivity Techniques for the Crisis-Free Office

1. Client Selection (Ranking A, B, C and D Clients)

2. Exclusivity

3. Designated Hitter

4. Preemptive Strike

5. Interruption Controls

6. Time Template – Power Hour

7. Case/Customer Status Organizer

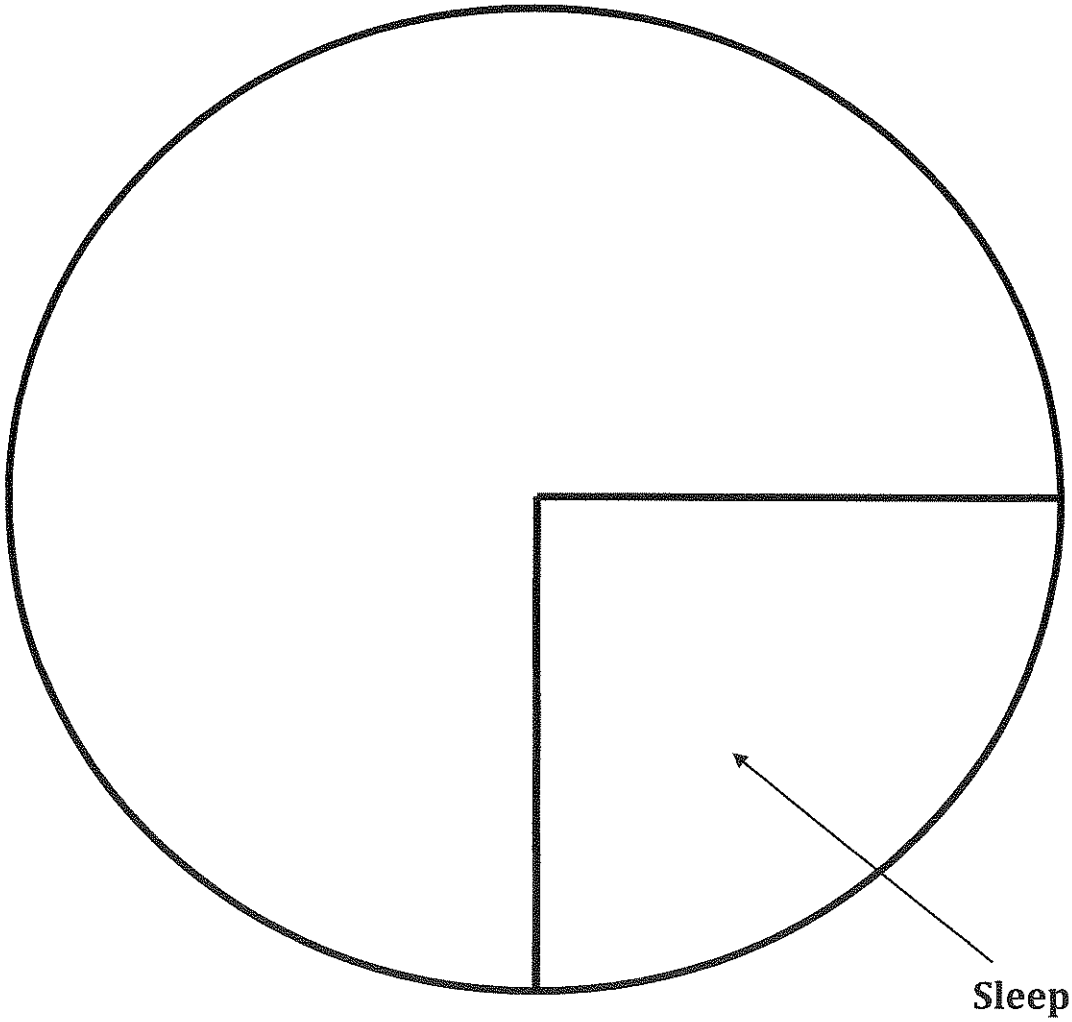
What Matters Most To You?

| List Categories by Level of Importance | Current Level of Satisfaction (1-3) (1 lowest, 3 highest) |
|---|--|
| 1. | |
| 2. | |
| 3. | |
| 4. | |
| 5. | |
| 6. | |
| 7. | |
| 8. | |
| 9. | |
| 10. | |

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Slicing the Pie of Life



Time Template

| | MONDAY | TUESDAY | WEDNESDAY | THURSDAY | FRIDAY |
|-------|-------------------------------|--------------------------|--------------------------|--------------------------|---------------------|
| 8:00 | Work Out | Work Out | Work Out | Work Out | Work Out |
| 8:30 | | | | | |
| 9:00 | Marketing Breakfast | Networking Group | Marketing Breakfast | Networking Group | Marketing Breakfast |
| 9:30 | | | | | |
| 10:00 | | | | | |
| 10:30 | | | | | Team Meeting |
| 11:00 | Client/Customer Phone Calls | Client/Customer Meetings | Client/Customer Meetings | Client Customer Meetings | |
| 11:30 | | | | | |
| 12:00 | | | | | |
| 12:30 | | | | | |
| 1:00 | | | | | |
| 1:30 | | | | | |
| 2:00 | Work Production | | | | Work Production |
| 2:30 | | | | | |
| 3:00 | | | | | |
| 3:30 | | | | | |
| 4:00 | | | | | Leave Early |
| 4:30 | Return Emails and Phone Calls | Return Emails/Calls | Return Emails/Calls | Return Emails/Calls | Return Emails/Calls |
| 5:00 | | | | | |

Time Template

| | MONDAY | TUESDAY | WEDNESDAY | THURSDAY | FRIDAY |
|-------|--------|---------|-----------|----------|--------|
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