

THE
ADVISOR
TRANSFORMATION

**KNOW THE VALUE
OF YOUR TIME**

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TAKE ACTION

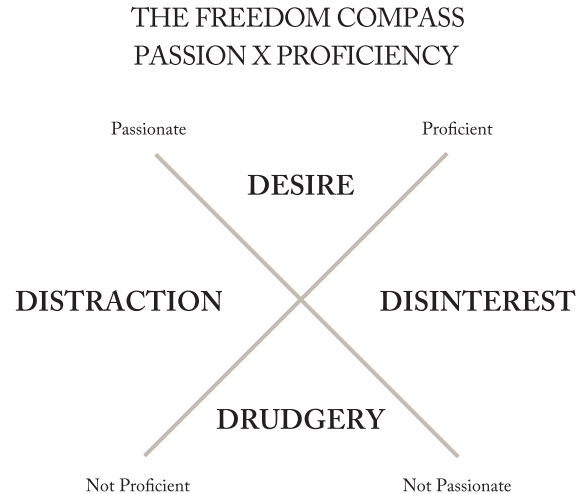
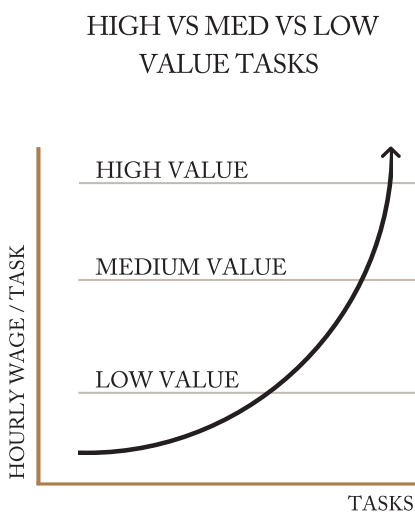
Track Your Time

(& Identify Opportunities to Delegate)

You can't solve a problem you can't see. And the easiest way to uncover potential roadblocks holding you back from your next big breakthrough is tracking your day-to-day activities in real time.

For an entire week, commit to keeping track of every single task you're spending time on inside your business. As you go, and for each task you spend time on, ask yourself two questions:

- ✓ *Is this a High, Medium, or Low Value Task to my business?*
- ✓ *Am I both passionate and proficient in this activity?*



Once you've tracked your time, we'll have an accurate picture of the high value tasks we may want to double down on *and* a list of items that you either shouldn't be doing or don't enjoy doing.

Bring this completed worksheet onto your next coaching call for next steps on how to get those Low Value x Drudgery Zone tasks off your plate - for good.

DAY OF WEEK:

NOTES:

BENCHMARKS FOR FOUNDERS

HIGH VALUE: Vision, Leadership, Marketing, Sales Meetings, Revenue-Producing Client Interactions.

MEDIUM VALUE: Appt. Setting, Routine Relationship Mgmt. Case Prep

LOW VALUE: Admin Duties, Data Input, Scheduling, Other Operational Duties

TASK	VALUE			JOY		TIME
	Low	Med.	High	Passionate	Proficient	
8 AM						
9 AM						
10 AM						
11 AM						
12 PM						
1 PM						
2 PM						
3 PM						
4 PM						
5 PM						
6 PM						
7 PM						