Align Your Time and Energy

ENERGY PRODUCING & REVENUE CREATING

Juan & Rita: Thanked me again this week for being there, always so appreciative
Jane E: Calls for my advice because she values it and knows I'm her trusted advisor
Bob & Matt: These guys get the value of a professional advisor, happily pay and refer their business associates
Vlad & Vic: Always so lovely to staff, not largest clients but delightful and refer occasionally

ABOVE THE LINE

BELOW THE LINE

ENERGY DRAINING & REVENUE DEPLETING

Smiths: Always nagging the, to respond and do their work
Alex K: Won't respond to staff, only me
Antonio R: Challenges advice, not profitable
Keelys: Nice old couple, with me since beginning but not profitable, work is boring and only interested in investments

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Below the Line Task Transition

TASK NAME	Delegate	Outsource	Eliminate	Delay	BY DATE	TASK NOTES
	☐	☐	☐	☐		
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