

# Client Model Time Calculator

Section 1: Use this simple table to calculate your client hours by segment to help you design a client model that aligns with your goals.

- ROT\* goal
- Total work hours / year
- Percentage (%) of time spent on clients
- Total client hours available each year
- Current client hours commitments
- Available client hours remaining

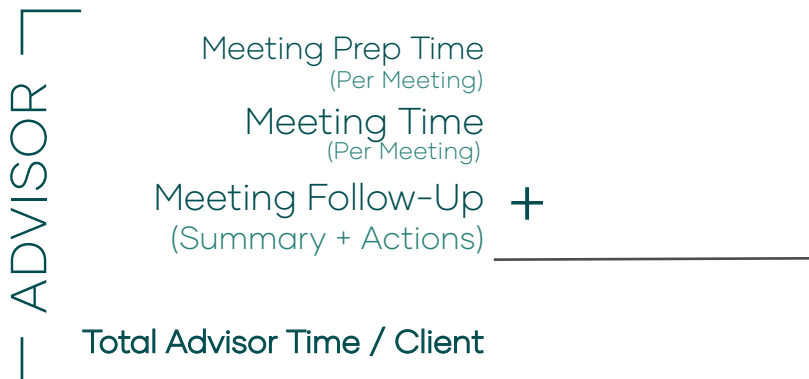
\*ROT = Return On Time  
(Advisor revenue-producing hours ONLY)

Section 2: Do some simple math and complete the table below to calculate Advisor time by segment and for the client base.

Tier	# Clients	# Client Meetings / Year	Total Advisor Hours / Mtg	Total Advisor Hours / Client	Total Advisor Hours / Tier	NOTES
Tier 1 (example)	10	4	4	16	160	

## Calculating Advisor Client Time:

Section 3: Calculate the average Advisor time per client to input into the table in Section 2. If you have more than one segment and/or Advisor time varies by segment, simply repeat this exercise for each segment and input that number for each segment in the table above.



Section 4: Now, assess the impact of your current client model on your revenue, time, productivity, staffing, profits and satisfaction. Note key take-aways for reference when designing your Client Service Model to align with your goals.

