



L I M I T L E S S

TAKING CONTROL OF YOUR TIME

Best Practices & Practice Resources Guidebook



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Taking Control of Your Time Guide

Make productivity your superpower. Learn tried-and-true tactics for maintaining focus and making the most of your time to elevate your efforts and skyrocket your satisfaction. Simplify your success by harnessing the power of time, avoiding distractions, successfully delegating email, and setting an annual and weekly schedule. Time is your greatest revenue-producing asset. When you're ready to make the most of it, begin implementing the Limitless Productivity Principles:



Best Practices

STEP 1: DETERMINE HOW YOU WANT TO SPEND YOUR TIME

You are hard-wired to want to do things you find enjoyable and to avoid things that are not enjoyable (aka, cause you pain). A key to effective time management is understanding where and how you want to spend your time. Practice tracking tasks which keep you above the line (in an energy-creating, revenue-producing state) vs. tasks which drop you below the line (in an energy-draining, revenue-depleting state).

STEP 2: IMPLEMENT A TIME-WISE MINDSET...

Time can neither be created nor destroyed—but it can be managed. Implement these best practices to become a master of your 24 hours:

- Eliminate Distractions and Interruptions: Distractions are constant and pervasive. To maintain focus and productivity, you must eliminate them. This means not checking email every 5 minutes, removing interruptions from members of your team and turning off those notifications. For more ideas on how to eliminate distractions, check out what members have shared in our Community and test out our list of recommended apps.
- Draft Scripts: It's hard to say no to your clients when they want your time, even if it interrupts you. But you can. The trick is having a go-to script for your team to share with the client so you can appropriately set the expectation that you have dedicated time for clients.
- Eat Your Frogs: "If the first thing you do each morning is eat a live frog, you can go through the day with the satisfaction of knowing that that is probably the worst thing that is going to happen to you all day long." Take some advice from Mark Twain and get the hard-to-do tasks done first.
- Avoid Fake Work: Don't confuse activity with productivity. Only do those things that really move the needle.
- Protect the Asset: Quality of work and concentration decline by 30% when you're tired. You'll get a lot less done or done well when you don't get enough sleep, eat well, or take care of your mental and emotional health.
- Automate Everything: A large amount of energy is spent doing the same things, repeatedly. Eliminate all redundancy with systems and automation.
- Create Barriers to Entry: You can be "accessible" at designated times when you can give your focus. Remember, you are not on call.
- Block Out Your Time: A time management trick used by some of the world's most successful entrepreneurs is time blocking. The key to time blocking is to divide your days into set increments and to then plan out your activities (or work) into blocks of time. To create the maximum level of efficiency, group like activities together. For example, creating a one-hour block of time for client work, followed by one hour of client meetings, then followed by another hour of client work will be challenging. You reach "peak performance" if your brain is focused on the same types of activity, so instead of doing one to two client meetings each day, try doing all your client meetings on Tuesdays and Wednesdays.
- Just Say No: Follow the Derek Sivers rule of, "If it's not a hell yeah, it's a no." If you feel anything less than genuine excitement over a task, figure out a way to delegate, outsource, eliminate or delay. For example, if you find reading and responding to emails taxing, implement an email delegation process and hire/outsource an assistant to manage it for you.



- ❑ **Outsource Almost Everything:** No man is an island. Delegating tasks to others is often one of the trickiest aspects of time management, one which requires an initial time and cost investment, but can yield the biggest payout (use a site like [athenago.com](https://www.athenago.com)).
- ❑ **Never Multitask:** Multitasking is a myth. The human brain is unable to perform tasks requiring two (or more) high-level brain functions at the same time. When you believe you are multitasking, you are, in fact, rapidly shifting between thinking about two different things at once, which results in lost time and focus as you shift from one task to the next repeatedly.
- ❑ **ROT \$1,000 Hour Only:** Your time is incredibly valuable, and if you don't set your value, other people will. Control what types of tasks you are using your time for, and limit them to only to-do's that you would charge \$1,000 an hour for (or tasks that are invaluable to you, like family time).

Don't beat yourself up if you don't manage your time perfectly every day. You need time to breathe, have fun and occasionally break the rules. Our rule of thumb for scheduling is based on the premise that time cannot be created or destroyed, but it can be moved. It's okay to not stick to your schedule with military discipline, but consider trading time rather than just deleting it. Is a client not able to meet during your Tuesday client time due to an urgent need? Normally, you'd schedule the meeting and just delete whatever you planned to do during that time. Instead, schedule that task or activity for the time your client normally would have met with you.

STEP 3: PAIRED WITH TRIED-AND-TRUE TACTICS

The following tested-in-the-trenches tactics are invaluable:

- ❑ **Become a Meeting Master:** Implement the Meeting Mastery Pyramid to save optimal amounts of time. Begin by setting firm rules, such as no Monday meetings, and move toward batching, standardizing processes and never making exceptions.
- ❑ **Set a 30-Second Intention:** Take 30 seconds before each task to breathe and get clear on exactly what outcome you want to achieve. Magical.
- ❑ **Down Time & Double It:** Socializing and interruptions account for 33% of non-productive work time, so be sure to allow space in your schedule with down time blocks. Allow 2x the time you think big tasks will take. Be realistic, not optimistic, about how long tasks take to complete.
- ❑ **Touch It Once:** If a task takes 2 minutes or less, do it. Touch a task only to do it, delegate it or direct it to later.



- Use Project Management Tools: Tools like Asana and Trello create clarity, process and eliminate the inefficiency of winging it.
- Use a Time Tracking software: You'll find out how long those "It takes just a minute" tasks really take, and where your focus is being directed. Apps like Rescue Time or Sectograph will send you daily or weekly reports of how many minutes/hours you have logged on various tasks, Focus Booster or Brain Focus will help you manage individual tasks and eliminate overwhelm, and MindNode will encourage clarity as you become more organized.

STEP 4: IMPLEMENT & FOLLOW YOUR NEW SCHEDULE

We recommend using a wall calendar for creating your annual schedule, but technology and Excel can work just as well. Once you have an annual schedule in place, create a weekly schedule and process (see following guidelines) and train your team. This ensures that you can stay on track and that your team knows when it is and isn't okay to interrupt you. The final step is to review your daily schedule at the beginning of each day and then follow it.



Scheduling Guidelines “SAMPLE”

RULES OF THE ROAD:

- Time can neither be created nor destroyed: Template time can be moved or traded based on these guidelines, but not deleted (with the occasional expectation because it just makes sense, or we have to adjust travel/out of office days).
- Priority Definitions:
 - URGENT: Can be scheduled outside of standard guidelines, within work blocks, meetings and after school activities IF APPROVED.
 - ASAP: Find time within the guidelines to get this on the calendar in the next week unless a longer time is specified.
 - When it Works: Provide a few times when there is space, even if it has to go into the coming months. ***OR specify BEFORE (date) or AFTER (date)
- Changing meetings / events
 - If changes need to be made to an event:
 - It should be done from the organizer’s calendar
 - The changes should be sent to the invitees to make sure everyone is on the same page
 - Changes to subjects / notes should not be sent to everyone
 - If a day needs to be cleared for travel, sick kids, etc., note which events you still plan to do, as all others will be rescheduled

ANNUAL & QUARTERLY CALENDAR REVIEW

1. Define desired annual schedule by November 15th for the upcoming calendar-year and update on the calendar no later than November 30th.
2. By the 15th of the second month of each quarter, the upcoming quarterly calendar is reviewed and adjusted to accommodate changes to the schedule.

CALENDAR REVIEW

1. DAILY: Review calendar before EOD for the remainder of the week to ensure calendar is clear and free of conflicts
2. FRIDAY: Review next two weeks and ensure calendar is clear and free of conflicts or changes that need to be made



Productivity Resources/Apps

THE BELOW ARE THE AVAILABLE PROCESSES, WORKSHEETS, SAMPLES AND APPS YOU CAN IMPLEMENT TO MAXIMIZE YOUR TIME.
EDITABLE VERSIONS ARE AVAILABLE.

RESOURCES:

Above the Line: Energy-Creating Activities
Annual Calendar
Email Delegation Process
Starting Today, I Will...
Weekly Schedule

TOOLS & APPS:

athenago.com
Trello or Asana
Rescue Time or Sectograph
Focus Booster or Brain Focus
Weekdone
MindNode

Weekly Adviser Schedule: Client meeting Sample

INSTRUCTIONS: The below is template for you to customize to your own needs. We recommend timeblocking so each day of the week is set aside for a specific purpose. When using the template to create your own schedule, we recommend adjusting to accommodate your annual schedule (days out of the office, strategic planning days, client meeting weeks, etc.) as time should flow to accommodate the broader picture. Another option is to create focus weeks where types of days (Business work, client meetings, time off) are grouped by week rather than by a regularly assigned day of the week. You can use this model to define the day "types" by simply removing the days of the week and adding any additional day types.

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
PLAN & PREP	CLIENT DAY	CLIENT DAY	CLIENT DAY	GROWTH, BUSINESS, FREE
7:00				7:00
7:30				7:30
8:00				8:00
8:30	Daily Prep & Email	Daily Prep & Email	Daily Prep & Email	Daily Prep & Email
9:00				9:00
9:30				9:30
10:00	CLIENT MEETING	CLIENT MEETING	CLIENT MEETING	GROWTH AND
	30 mins	30 mins	30 mins	10:00
	buffer	buffer	buffer	10:30
10:30	CLIENT MEETING PREP	CLIENT MEETING PREP	CLIENT MEETING PREP	MARKETING ACTIVITIES
	30 mins	30 mins	30 mins	10:30
11:00	MONTHLY BUSINESS LUNCH			(or free time)
	30 mins			11:00
12:00				12:00
12:30	for people with teams	MARKETING LUNCH		LUNCH OUT
	buffer			12:30
1:00	CLIENT MEETING	CLIENT MEETING	CLIENT MEETING	1:00
	30 mins	30 mins	30 mins	1:30
1:30	ADVISER TIME	ADVISER TIME	ADVISER TIME	MARKETING ACTIVITIES
	30 mins	30 mins	30 mins	2:00
2:30	needed for client super prep	buffer	buffer	BUSINESS WORK
	30 mins			2:30
3:00	CLIENT MEETING	CLIENT MEETING	CLIENT MEETING	3:00
	30 mins	30 mins	30 mins	3:30
3:30	PROFESSIONAL DEV.	CLIENT MEETING NOTES	CLIENT MEETING NOTES	PROFESSIONAL DEV.
	30 mins	30 mins	30 mins	4:00
4:00	Daily Wrap Up	Daily Wrap Up	Daily Wrap Up	Daily Wrap Up
	30 mins	30 mins	30 mins	4:30
4:30				4:30
5:00				5:00
5:30				5:30
6:00				6:00
6:30				6:30

Model Office Annual Calendar Example

Month	Jan 2020	Feb 2020	Mar 2020	Apr 2020	May 2020	Jun 2020	Jul 2020	Aug 2020	September 2020	October 2020	November 2020	December 2020
Client Meeting Schedule	100 client mgts - 1 hour per week	100 client mgts - 1 hour per week	100 client mgts - 1 hour per week	100 client mgts - 1 hour per week	100 client mgts - 1 hour per week	100 client mgts - 1 hour per week	100 client mgts - 1 hour per week	100 client mgts - 1 hour per week	100 client mgts - 1 hour per week	100 client mgts - 1 hour per week	100 client mgts - 1 hour per week	100 client mgts - 1 hour per week
Marketing	20 marketing / 10 quarters	20 marketing / 10 quarters	20 marketing / 10 quarters	20 marketing / 10 quarters	20 marketing / 10 quarters	20 marketing / 10 quarters	20 marketing / 10 quarters	20 marketing / 10 quarters	20 marketing / 10 quarters	20 marketing / 10 quarters	20 marketing / 10 quarters	20 marketing / 10 quarters
Professional Dev	10 hrs / 10 weeks	10 hrs / 10 weeks	10 hrs / 10 weeks	10 hrs / 10 weeks	10 hrs / 10 weeks	10 hrs / 10 weeks	10 hrs / 10 weeks	10 hrs / 10 weeks	10 hrs / 10 weeks	10 hrs / 10 weeks	10 hrs / 10 weeks	10 hrs / 10 weeks

Above the Line: Self-Talk

Name: _____ Time Period: _____
Subject: _____

ENERGY PRODUCING & REVENUE CREATING

ABOVE THE LINE

BELOW THE LINE

ENERGY DRAINING & REVENUE DEPLETING

Email Delegation Process: SAMPLE

Managing Stephanie's Email Inbox

STEPHANIE: OWNER Executive Assistant
FREQUENCY: 3x Daily

PURPOSE: Email is a necessary communication tool and a galactic time suck. Stephanie gets paid to THINK and your job is to make sure she sees only the email that require her attention while keeping her fully informed of what is happening at any time.

ROLE: The Executive Assistant's job is to make sure Stephanie delivers as promised, on time, every time. Expertly managing Stephanie's email is critical to meeting this standard.

- Your #1 job is to think. We can't write thinking into this process, so we're counting on you.
- Your job is to manage Stephanie's email so that it is processed, appropriately handled and/or prepared for Stephanie so that she can respond efficiently.
- You will triage, screen, organize and process all of that you are able, focus Stephanie's attention on the items that require her personal attention, and ensure that all activities are captured, scheduled and followed-through on so Stephanie can focus her time on high-value/high-impact activities.
- You will stay updated on all of Stephanie's current clients and ongoing activities, keeping up-to-date on Stephanie's priorities and projects, goals and timelines and what she wants/needs to do with each on an ongoing basis so that you can process, schedule and oversee projects.

PROCESS:

- Check email 3x daily at 8 a.m., 12:00 p.m. and 4 p.m. to filter, organize and process email or prepare Stephanie's incoming email so that she can review, respond or direct as needed.
- Stephanie consistently checks email 1x day in her "Daily Prep" work-block. She will often check again in her 30-minute "Daily Wrap" work-block as time allows, but don't rely on this.

RULES OF THE ROAD:

- BE EFFICIENT:** Checking and processing email should take no more than 30 minutes each time.
- RESPONSE TIME:** Incoming email should never go more than 2 days without a response. An email received on Monday should receive a reply by Wednesday.
- Time sensitive emails should be handled with appropriate urgency.**
- QUESTIONS?** When in doubt about how to process an email, ask Stephanie. All but urgent questions should be held for your Daily Check in DCI with Stephanie. If urgent, WhatsApp Stephanie.
- MAKE IT EASY FOR HER:** Read each incoming email thoughtfully, soon for reply, actions or work needed in response.
- KEEP HER INFORMED:** Stephanie likes to be informed of what's happening but doesn't need every detail. Note quick FYIs to cover in DCI.



