

TAKING CONTROL OF YOUR TIME

TO BOOST YOUR PRODUCTIVITY,
PERFORMANCE & PEACE OF MIND



ADAM
CMEJLA

Time is your greatest
revenue-producing

ASSET

(and your greatest lever)



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LIMITLESS ADVISOR

1. CLARITY

You begin with the end in mind. You have a clear vision of the end result you are working to achieve.



4. PROTECT

Protect the asset. You are the asset. Maintain your body, mind, and spirit for peak state. Compromise has serious costs.



2. FOCUS

You are fanatical about focus. You direct your attention where it will have the greatest impact and value.



5. INTENTION

All efforts have a purpose. You've learned "No" is a complete sentence and selectively focus where it matters most.



3. PACE

You are active, not busy. You work hard but are not overwhelmed. Busyness is a sign of poor mindset and methods.



PRODUCTIVITY MINDSET

6. PROCESS

You manage work, it doesn't manage you. You achieve hyper-efficiency with routines, systems, and automated workflows.





WHAT WAS YOUR AVERAGE HOURLY RATE IN 2023?

Total income / Total hours worked

- \$50 hour
- \$250 hour
- \$500 hour
- \$1,000 hour



SHOOT FOR: \$1,000 hour ROT

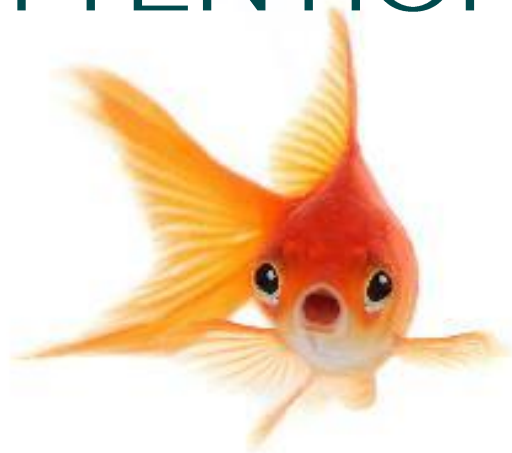
TOTAL REVENUE GENERATED / TOTAL # OF REVENUE-PRODUCING HOURS

EXAMPLE:

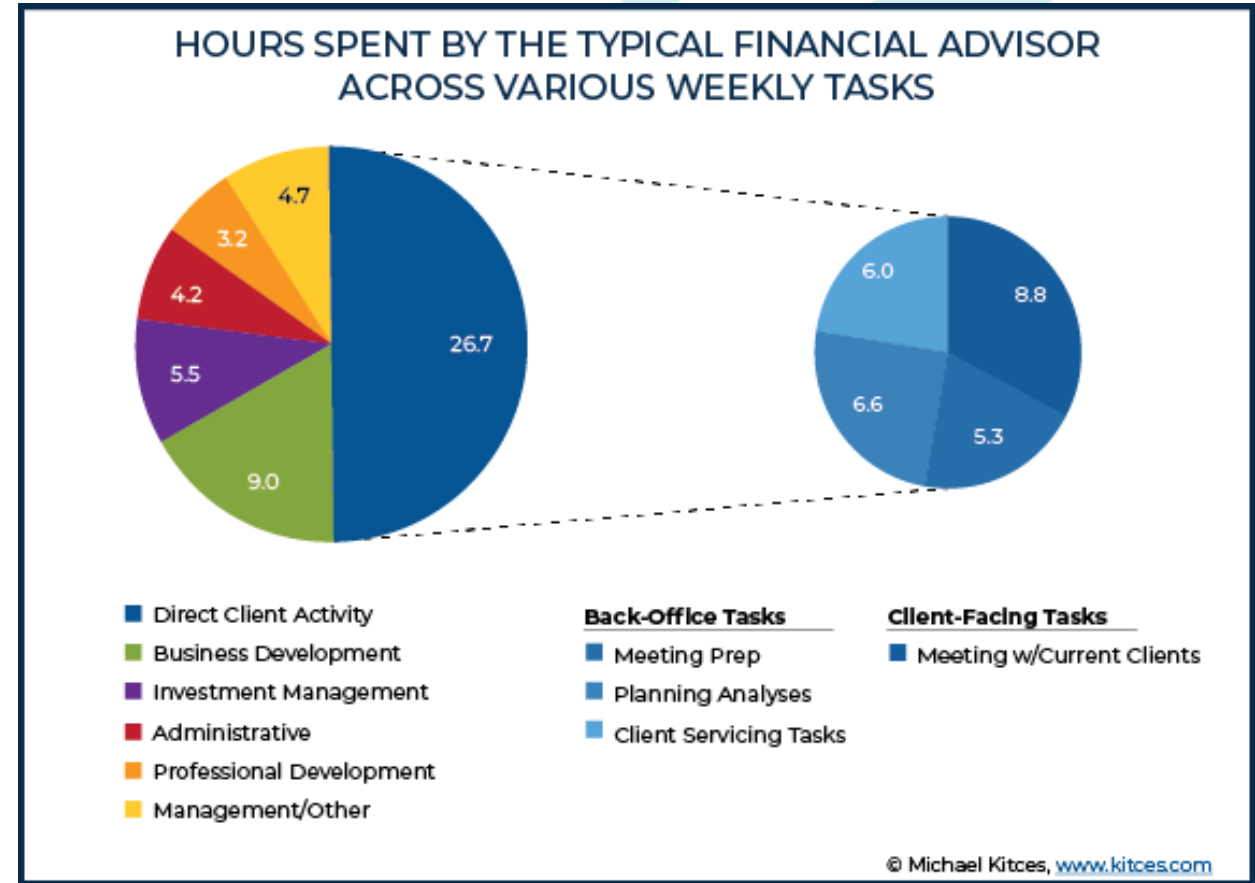
- Alek works 2,000 hours a year. Alek generates \$250,000 in revenue.
- Alek spends 1,000 hours a year on revenue-producing activities.
- \$250,000 revenue / the 1,000 hours worked to generate and manage that revenue is the ROT, Alek's Return on Time (ROT), or \$250 hour.
- At \$1,000 ROT, client segments generating \$5,000 a year would receive an average of 5 hours of Advisor time in the service model.



YOUR ATTENTION, PLEASE



Mobile phone use: 4+ hours day
Time on social media: 136 mins day
times/day check email: 74-168
Texting or messaging: 33-128x day
Recovery time/distractions: 23 min, 15 sec



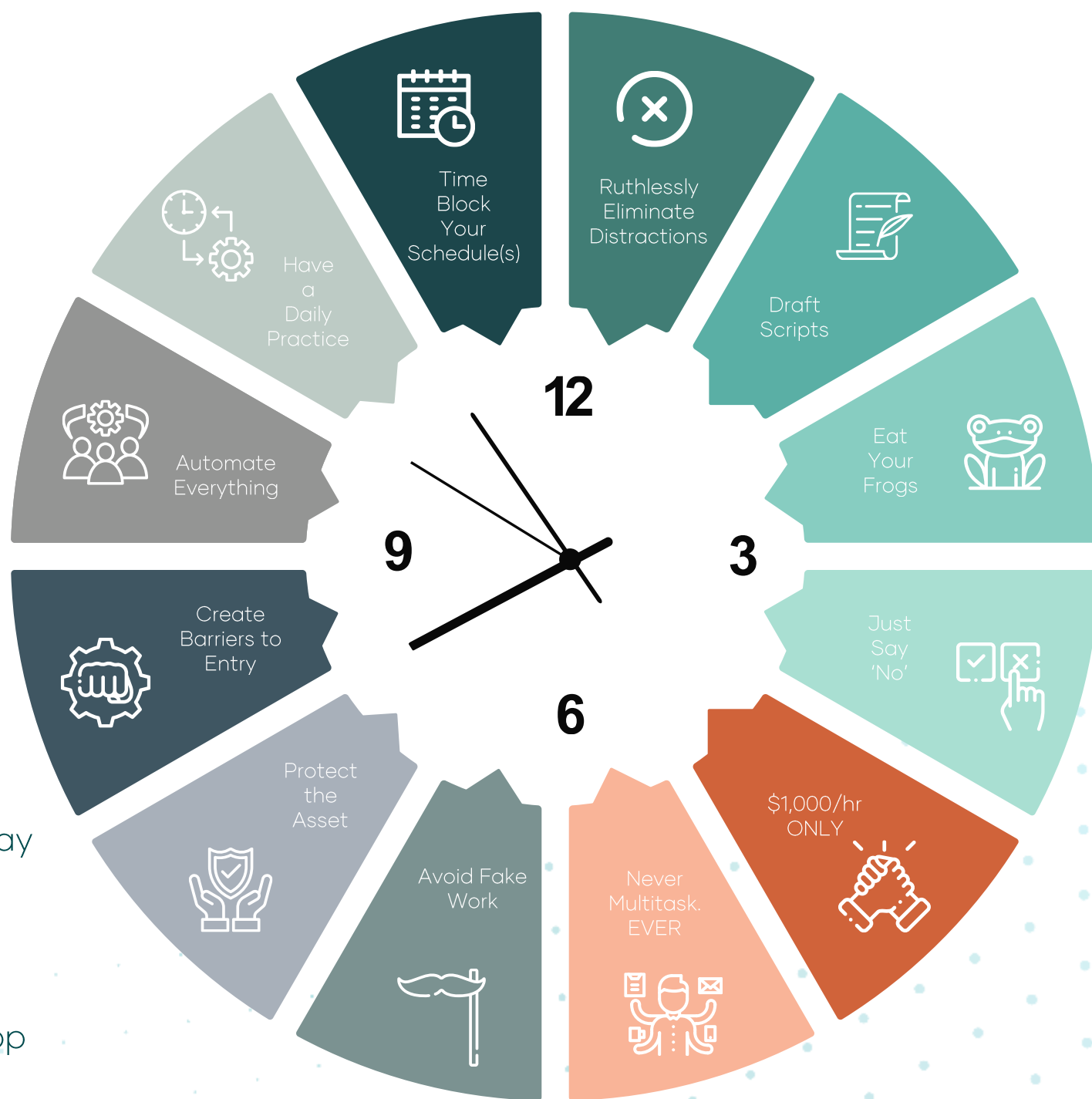
The deck is stacked against you

ELIMINATE DISTRACTIONS



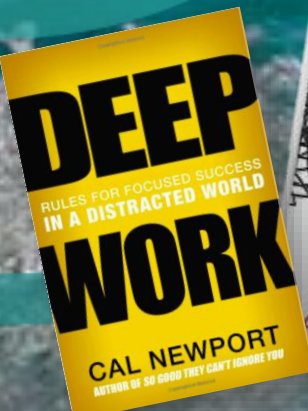
PRODUCTIVITY HACKS

- [How to Set up Your iPhone for Focus and Productivity](#)
- Scheduling Software (Acuity, Calendly)
- Site blockers (Focus Booster, Brain Focus, Stay Focused)
- Disable ALL phone notifications except 2 (school & spouse)
- Time management apps (Rescue Time)
- Put a picture of what matters on your desktop
- See *Taking Control of Your Time Guidebook*



YOU DON'T HAVE A
TIME PROBLEM

YOU HAVE A
PRIORITY PROBLEM



FOCUS ON WHAT MOVES THE NEEDLE

Energy-creating
REVENUE-PRODUCING
ACTIVITIES

EVERYTHING ELSE

Bookkeeping
Graphic design
Scheduling

Checking email
Data entry
Compliance tasks

Portfolio
management

Small client meetings

Flights/Travel
Scheduling
Marketing admin

Paperwork
Service requests
Office management



NEWS FLASH:
YOU'RE NOT THAT BIG OF A DEAL

LIMITLESS



CLIENT MEETING SURGES

Batching meetings for maximum efficiency and deeper value



THE *Meeting* PROCESS: BEST PRACTICE

4 Simple Steps to a More Streamlined, Satisfying Review Meeting Experience



1 SCHEDULING

- Contact clients and provide Acuity link
6 weeks out
- Send reminder to schedule email
4 weeks out
- Call clients that haven't scheduled
3 weeks out
- Send Meeting Confirmation Letter
Upon scheduling



2 PREPARING

- Review client situation; confirm Meeting Agenda
4 weeks out
- Email Meeting Agenda to client for feedback
3 weeks out
- Engage COI touchpoint
3 weeks out
- Case Prep: One-Page Plan, projections, materials
2 weeks out
- Reminder Email to client/COI
1 week out
- Prep "Meeting Room"
Day of



3 THE MEETING

- Meeting Room, prepped & ready
- If on-site, greet and direct to meeting room
- If virtual, login with welcome slide
15 minutes prior
- Meet with client(s)
75 minutes
- Adviser downloads notes & next steps
15 min following



4 FOLLOW-UP

- Draft One-Page Plan/ Meeting Summary
1-3 days following
- One-Page Plan/Meeting Summary to client
3 days post (NLT 5 days)
- Post meeting check-in with client
30-60-90 days (tailor)

CX touchpoints

- Scheduling email w/calendar link
- Reminder email with calendar link
- Meeting confirmation letter

- Meeting Agenda
- Meeting reminder with agenda for input

- Personal welcome
- Meeting environment
- Meeting materials
- Meeting Agenda
- Talking points

- Meeting follow-up email



LESSON REVIEW:
CLIENT MEETING SURGES



Weekly SCHEDULE

surge and non-surge weeks

Weekly Adviser Schedule: Client Meeting Sample

INSTRUCTIONS: The below is template for you to customize to your own needs. We recommend time blocking 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 flex to accommodate the broader picture. Another option is to create focus weeks where types of days (business work, client meetings, time off months) 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
7:00	PLAN & PREP	CLIENT DAY	CLIENT DAY	CLIENT DAY	GROWTH, BUSINESS, FREE
7:30					
8:00					
8:30	Daily Prep & Email	Daily Prep & Email	Daily Prep & Email	Daily Prep & Email	Daily Prep & Email
9:00	WEEKLY CLIENT MEETING	CLIENT APPT	CLIENT APPT / WORK	CLIENT APPT	
9:30		75 mins	75 mins		
10:00	CLIENT MEETING PREP	buffer			
10:30					
11:00					
11:30					

SCHEDULE PRIORITIES...

- Mondays: work "on" business
- Tues-Thurs: client meetings or other
- Fridays: free or focus on growth/priorities
- Non-surge weeks:
 - Business development
 - Business management
 - Portfolio management
 - CE/Professional development
 - Team training and development
 - Free time

Weekly Adviser Schedule: No Client Meetings SAMPLE

INSTRUCTIONS: The below is template for you to customize to your own needs. We recommend time blocking 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 flex to accommodate the broader picture. Another option is to create focus weeks where types of days (business work, client meetings, time off months) 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
	Prep Day	Meetings & Clients	Meetings & Clients	Limitless	Prospecting / Out Of Office Day
7:00					
7:30	8:30 - 4:30 EXAMPLE				
8:00					
8:30	Daily Prep & Email	Daily Prep & Email	Daily Prep & Email	Daily Prep & Email	Daily Prep & Email
9:00					
9:30	WEEKLY CLIENT MEETING	YOU DECIDE	YOU DECIDE	YOU DECIDE	
10:00		Free or work, your call	Free or work, your call	Free of work, your call	GROWTH AND
10:30			buffer	buffer	MARKETING ACTIVITIES
11:00	WEEKLY CLIENT PREP	RESEARCH / INVESTMENTS	RESEARCH / PLANNING	RESEARCH / INVESTMENTS	(or free time)
11:30					
12:00	MONTHLY BUSINESS LUNCH	LUNCH		LUNCH	
12:30	for people with teams		MARKETING LUNCH		LUNCH OUT
1:00	buffer	buffer		buffer	LUNCH OUT
1:30	WEEKLY BUSINESS MEETING	CLIENT SERVICE	CLIENT SERVICE	LIMITLESS CALLS	
2:00	Founder / Partners			WORK AND TEAM MEETINGS	MARKETING ACTIVITIES
2:30		buffer		buffer	BUSINESS WORK
3:00	PROFESSIONAL DEV.	CLIENT SERVICE	CLIENT SERVICE	LIMITLESS CALLS	
3:30	READING			WORK AND TEAM MEETINGS	READING
4:00	Daily Wrap Up	Daily Wrap Up	Daily Wrap Up	Daily Wrap Up	PROFESSIONAL DEV.
4:30					

THE TRUSTED ASSISTANT

“Alek holds client meetings in April and October after taxes have been filed and to do year-end planning.”

“If you have a pressing issue, Alek is happy to meet with you for 30 minutes (next Wednesday at 2), or I can schedule a phone call (tomorrow at 1:30),” otherwise we prefer to meet in April so we can be prepared for a full meeting.

“It was great seeing you today. Alek would like to get together again in October. Can we schedule that now or should I call in July?”

“Alek sees clients on Tuesday, Wednesday, and Thursday. Which of those days works best for you? (answer) Great. Alek has a meeting time at 10 or 2 that day. Do either of those times work for you or should we look at a different day?”

“Alek reserves Mondays for planning work and preparing for that week’s meetings, so he is available to meet on Tuesdays, Wednesdays, or Thursdays. Would DATE or DATE be a good day for you?”





WANT TO BUILD A
\$1M PRACTICE?

STOP DOING
\$50 HOUR WORK

THE TRUSTED ASSISTANT



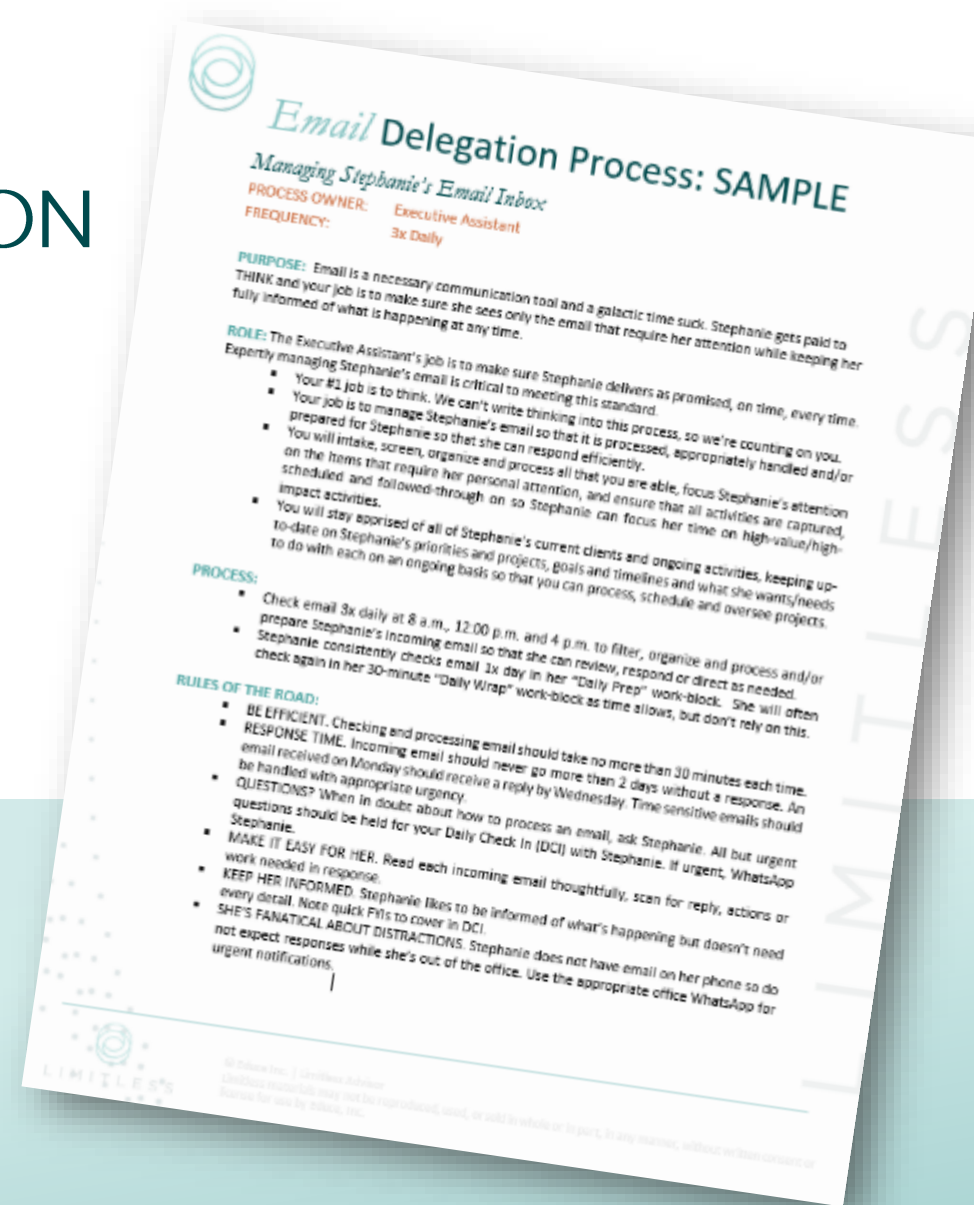
LIMITLESS

EMAIL IS A MASSIVE DISTRACTION

- Assistant checks email 3-4x day
- You only check email 1-2x day
- Spend 30 minutes responding daily
- Balance scheduled during "client service" time
- Remove from your phone
- Use tracking apps / screen time



How many hours a day do you spend checking email?



A person in a gym, wearing a dark long-sleeved shirt and shorts, is crouching on a wooden floor. They are holding a thick, braided rope that is coiled on the floor. The background shows gym equipment and a window with a grid pattern. The entire image has a teal color overlay.

HABITS:
OUT WITH THE OLD
IN WITH THE NEW

1. WHEN THIS HAPPENS:
When a client asks to meet with me
on Monday...

2. INSTEAD OF:
Saying yes because I'm afraid
to say no...

3. I WILL:
Explain that Mondays are
reserved for planning, and to prepare
for that week's client meetings.

PERSONAL ACCOUNTABILITY



What reward or punishment will motivate you, and who can reliably help you enforce it?





STARTING TODAY



I WILL...

- only check email 2x day*
- set social media limits on phone*
- hire a virtual assistant*
- use Calendly / app for scheduling*

Starting Today

What's been the most challenging part of the business today? Why was it so challenging to do now for me? Think of the most important factors, but part of this is the ability to create action and accountability. When it comes to what you want to achieve, try breaking it down into a simple process.

DEFINE YOUR GOAL: If you don't know what you want to achieve, it's hard to accomplish it. Consider starting with simple actions that will have a big impact.

I will set my annual schedule and block client meeting times.

COMMIT TO DOING IT: You have to want it, so commit to it – you know the cost and importance of your goal, your commitment to it, and the freedom and flexibility to work from anywhere and do things that are important to me personally.

I will set my annual schedule and block client meetings to work from anywhere and do things that are important to me personally.

DO IT! Next, do what needs to be done. Find your deadline and on that date commit to completing it and moving forward.

*Starting today, I will set my annual schedule and block client meetings to work from anywhere and do things that are important to me personally.

CREATE THE HABIT: For anything to stick, you need to make it simple.

*Follow my annual schedule and block client meetings to work from anywhere and do things that are important to me personally.

LIMITLESS

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Starting Today

Advisor Name: _____

1. I will _____
Because _____

2. I will _____
Because _____

3. I will _____
Because _____

4. I will _____
Because _____

5. I will _____
Because _____

LIMITLESS

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LEARN

- Taking Control of Your Time Lesson
- Time Article
Stephanie Bogan
- Essentialism
Greg McKeown
- Atomic Habits
Carol Dweck
- Deep Work
Cal Newport
- Getting Things Done
David Allen



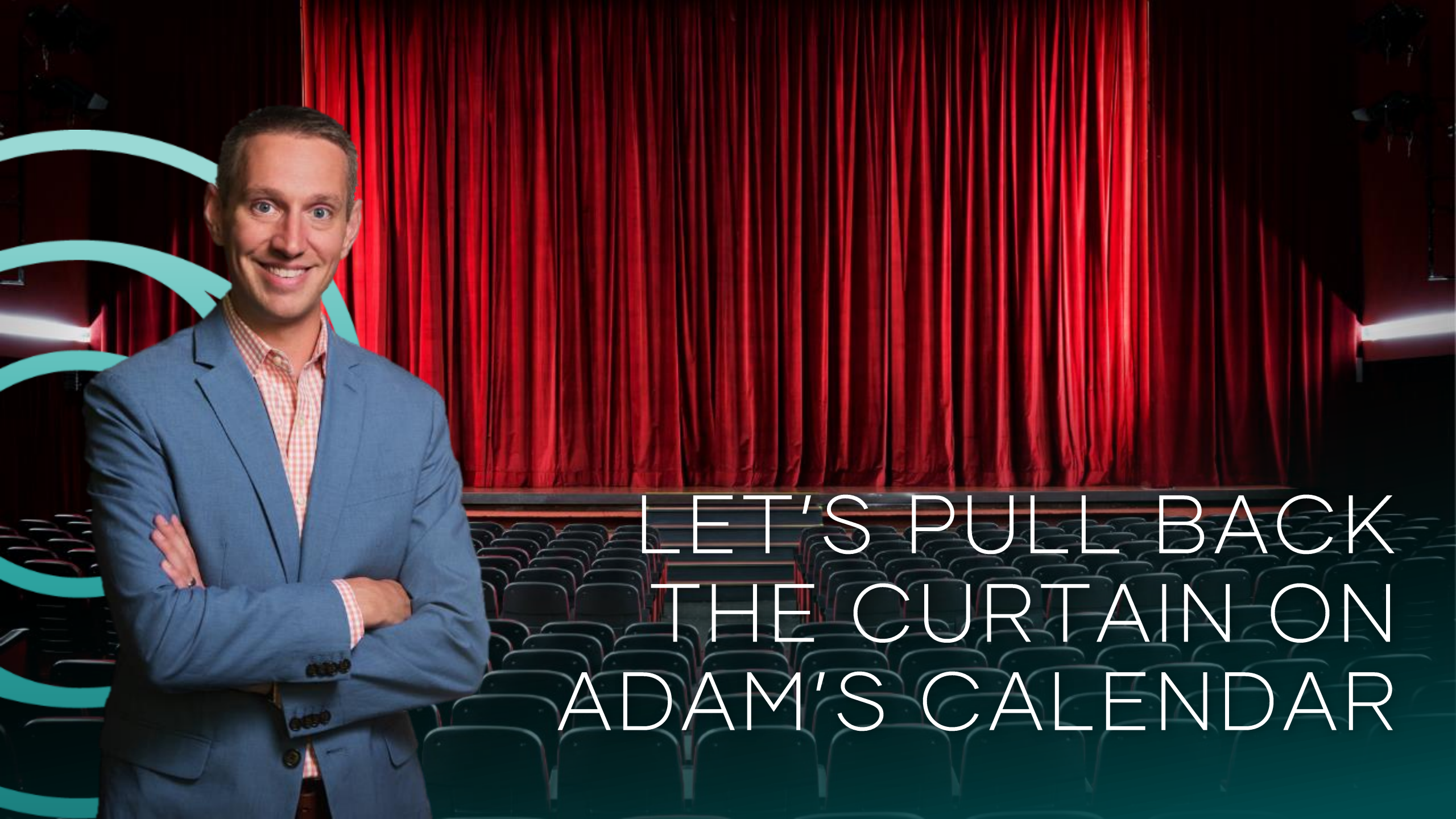
APPLY

- **Read**
Taking Control of Your Time Guidebook
- **Complete**
Above-the-Line Task Transition
Starting Today, I Will... Exercise
- **Draft**
Your Annual Schedule (Wall Calendar)
Your Weekly Schedule



ACT

- Select 3 Productivity Hacks to try (then try another...)
- Get serious about using your Success Shifter



LET'S PULL BACK
THE CURTAIN ON
ADAM'S CALENDAR

LIMITLESS Q&A

