

TIME

The most PRECIOUS ASSET we have!

- Tools to use – 90 Day Planner, Google Calendar, Time Blocking, etc.
(Remember...it's about being "Productive" and **LEVERAGING** our TIME!)
- You must have your "**Planning Device**" with you at all times!
- Write down everything** you need to do.
- Have a "**completion**" of task... attitude/system.
- Follow THROUGH** vs Follow up!
- If you are not **disciplined** with your time, you have little chance of being successful.
- YOUR **TIME** is your most precious asset!
- Check your productivity literally every hour from 8:00 am to midnight for as long as it takes.
- Not** the smartest, most talented or creative wins, but the most **disciplined!**
- Your **DISCIPLINE** will overcome **every** one of your *weaknesses*.
- DISCIPLINE...**"THE GREAT EQUALIZER"

TIME MANAGEMENT

You must get RESULTS with time put in!

STEP 1: Understand the difference between doing **8** new kitchen tables a week **vs.** **4** new kitchen tables a week.

- At District Leader the income difference is \$_____ vs. \$_____
- The **BIGGEST** difference is that you train TWICE AS MANY PEOPLE to do the business in the same amount of time.
- 5 years to financial independence

VS

- 10 years to financial independence and no stardom
- 5 years of being *out* in the FIELD

VS

- 10+ years of
 - sitting at dirty kitchen tables
 - spending time away from family
 - answer rookie questions (same one 10,000 times)
 - Partner being SUPPORTIVE or **not** being supportive

STEP 2: **Decide** you WANT to receive the benefits

STEP 3: BELIEVE you can do 8 new kitchen tables. (Draw it out)

	<u>5:00 pm START TIME</u>	<u>6:00 pm START TIME</u>
First:	5:00 – 6:30 pm 45 min. intro. and pres. 45 min. on FNA/Close 30 min. drive time	6:00 – 7:10 pm 45 min. intro. and pres. 25 min. FNA/Close 20 min. drive time
Second:	7:00 – 8:30 pm 45 min. intro. And pres. 45 min. on FNA/Close 30 min. drive time	7:30 – 8:40 pm 45 min. intro. & pres. 25 min. FNA/Close 20 min. drive time
Third:	9:00 pm Closing Appt.	9:00 pm Closing Appt.

NOTE: Use the “ish” principle!

STEP 4: UTILIZE THESE 11 HELPFUL TIPS:

- 1) Start **EARLY**: “What is the **EARLIEST** I can pop by?”
- 2) Schedule closes in **LATEST** time slot: “What is the **LATEST** I can pop by?”
- 3) Use referral system and have information on table when you get there.
 - a) Be specific about how you want **INFORMATION LAID OUT**.
- 4) Make sure trainee knows their job is to help you get in and out **FAST**.
- 5) Tell client up front you have another appointment to get to so you can’t take too long. You know they will have questions, but you will be getting together again.
- 6) The purpose of a 1st time Appointment:
 - a) **DISTURB** enough to pick up financial information/Close Life – “*if it makes sense!*”
 - b) Create enough **CURIOSITY** to get them to a meeting
 - c) Create a sense of **URGENCY**
- 7) Know your **PRESENTATION** word for word.
- 8) Know the **FNA** questionnaire inside and out. (*Review FNA Boot Camp with Ian Prukner*)
- 9) Information you **CAN PICK UP**; don’t fill out in the house. (IE: Mortgage information and list of debts, etc.)
 - a) If you need to leave a copy of second page of FNA for debt info., do it and call back later to get info.
- 10) Have the TURBO **LIFE APPLICATION** already filled out when you go back on the close.
ATTENTION: **DO NOT FLY THRU COMMITMENTS!!!!** TAKE YOUR TIME TO MAKE SURE EACH COMMITMENT IS A **REAL** COMMITMENT.
- 11) Know what time slots are PRIME TIME.

Monday **Wednesday** **Thursday** **Saturday Afternoon**

STEP 5: Prioritize the tasks a trainer must do

- Priority #1: **FIELD** Training
1st Time **KITCHEN TABLES**
1st Time **CLOSES**
- Priority #2: **PERSONAL**
1st Time Kitchen Tables
1st Time Closes
- Priority #3: **ALL OTHER** Activities
Policy Delivery
Securities appointments
Servicing old clients (referrals)
FNA’s
New rep speeches

PRIME TIME = RESULT DRIVEN ACTIVITY
NON-PRIME TIME = SERVICE DRIVEN ACTIVITY

TIME BLOCKING – *This Process Reveals your “PRIMERICA TIME”*

Name: _____

Week of: _____

K.T.'s Money & Bus. Seminars FNA's Term Trans. Income IBA's

Goal: _____

Actual: _____

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
6:00 AM							
7:00 AM							
8:00 AM							
9:00 AM							
10:00 AM							
11:00 AM							
12:00 PM							
1:00 PM							
2:00 PM							
3:00 PM							
4:00 PM							
5:00 PM							
6:00 PM							
7:00 PM							
8:00 PM							
9:00 PM							
10:00 PM							

“Example” of a Good/Balanced Full-Time Work Schedule

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
6:00 AM	God/Family Self-Improve -Bible -Audio	God/Family Self-Improve -Bible -Audio	God/Family Self-Improve -Bible -Audio	God/Family Self-Improve -Bible -Audio	God/Family Self-Improve -Bible -Audio	God/Family Self-Improve -Bible -Audio	God/Family Self-Improve -Bible -Audio
7:00 AM	- Website -Workout	- Website -Workout	- Website -Workout	- Website -Workout	- Website -Workout	- Website -Workout	- Website -Workout
8:00 AM	7:30am Arrive to Office PREP	7:30am Arrive to Office PREP	7:30am Arrive to Office PREP	7:30am Arrive to Office PREP	7:30am Arrive to Office PREP	7:30am Arrive to Office “Fast Track”	God Family
9:00 AM	Accountability Outgoing Prospecting Calls	Accountability Outgoing Prospecting Calls	Accountability Outgoing Prospecting Calls	Accountability Outgoing Prospecting Calls	Leadership Training	Saturday “Fast Track Training”	
10:00 AM	NO INCOMING CALLS	NO INCOMING CALLS	NO INCOMING CALLS	NO INCOMING CALLS			
11:00 AM	NO INCOMING CALLS	NO INCOMING CALLS	NO INCOMING CALLS	NO INCOMING CALLS	Mentoring	One on One’s OR TEAM	
12:00 PM	Lunch - Learn Return Calls	Lunch - Learn Return Calls	Lunch - Learn Return Calls	Lunch - Learn Return Calls	Lunch - Learn Return Calls	Lunch Learn Family/Team	
1:00 PM	Complete Interviews <u>every ½ hour</u>	Complete Interviews <u>every ½ hour</u>	Complete Interviews <u>every ½ hour</u>	Complete Interviews <u>every ½ hour</u>	Complete Interviews <u>every ½ hour</u>		
2:00 PM	1:00-Interview 1:30-Interview 2:00-Interview	1:00-Interview 1:30-Interview 2:00-Interview	1:00-Interview 1:30-Interview 2:00-Interview	1:00-Interview 1:30-Interview 2:00-Interview	1:00-Interview 1:30-Interview 2:00-Interview	Two 1 st Calls (KT’s)	
3:00 PM	2:30-Interview 3:00-Interview 3:30-Interview	2:30-Interview 3:00-Interview	2:30-Interview 3:00-Interview 3:30-Interview	2:30-Interview 3:00-Interview 3:30-Interview	2:30-Interview 3:00-Interview 3:30-Interview		
4:00 PM	Last Interview starts at 3:30	Dinner	Last Interview starts at 3:30	Last Interview starts at 3:30	Last Interview starts at 3:30		
5:00 PM	Dinner Family	Pick-up Guests	Dinner Family	Dinner Family	Dinner Family	One Close/Carryback	
6:00 PM	Two 1 st Calls (KT’s)	Money & Business Seminars	Two 1 st Calls (KT’s)	Two 1 st Calls (KT’s)	Policy Delivery FNA Securities Re-Visitation’s Follow up’s New Reps	Family	Call Blitz For Fill in’s
7:00 PM		Policy Delivery FNA Securities Re-Visitation’s Follow up’s New Reps					
8:00 PM		One Close/Carryback					One Close/Carryback
9:00 PM							
10:00 PM							

8 NEW KITCHEN TABLES/WEEK = \$100,000 INCOME/Year – DISCIPLINE is the KEY!

What do you have to do to get your 8 kitchen tables? (IE: 1,000 Name List, “5 to Stay Alive”)

What adjustments do you need to make?

1. Do you have enough people to train or names to call?...**IF NO** – Use the 1,000 Name List, “5 to Stay Alive”) (**people bank**)
2. Are you doing at least 2 new appointments each night you work?...**IF NO** – Are you starting as early as possible? Are you telling them to have everything on the table when you get there? Are you controlling the point of contact?

THERE ARE 168 Hours in a Week – It is ALL about how you Invest those Hours!

MAKE THE NECESSARY ADJUSTMENTS AND THE RING IS YOURS!!

100/100 VISION

Leadership by Example

Referrals

Mon.	Tue.	Wed.	Thurs.	Fri.	Sat.	Sun.
PRIORITIES: By Noon: <i>(KT, INT, INVITE)</i> Prospect 5 Set 5 "5 to Say Alive" By 5pm: Complete 3 Interviews By 11pm: 2-1 st KT's 1-Close	PRIORITIES: By Noon: <i>(KT, INT, INVITE)</i> Prospect 5 Set 5 "5 to Say Alive" By 5pm: Complete 3 Interviews Business Overview <i>Team Mtg. after Mtg. FNA Prep Securities Follow-ups</i>	PRIORITIES: By Noon: <i>(KT, INT, INVITE)</i> Prospect 5 Set 5 "5 to Say Alive" By 5pm: Complete 3 Interviews By 11pm: 2-1 st KT's 1-Close	PRIORITIES: By Noon: <i>(KT, INT, INVITE)</i> Prospect 5 Set 5 "5 to Say Alive" By 5pm: Complete 3 Interviews By 11pm: 2-1 st KT's 1-Close	PRIORITIES: By 3pm: <i>(KT, INT, INVITE)</i> Prospect 5 Set 5 "5 to Say Alive" By 5pm: Complete 3 Interviews 5 p.m. – 7pm <i>Policy Delivery Junk FNA Securities Old Clients Follow-ups</i> 7pm Family	PRIORITIES: 7:30 – 12:00 "Fast Track" By 3pm: "5 to Say Alive" By 5pm: 2-1 st KT's 1 – Close 5 p.m. – 7pm <i>1-1st KT OR 1 – Close OR TEAM Function IE: Pizza, Picnic Or Gathering</i> 7pm Family	PRIORITIES: GOD FAMILY 5 p.m. – 7pm Make sure the Week is SET (use for "Fill in's & Team appts) 7pm Family

Time Mgmt

Fundamentally Sound

Referral Based
<p>All appointments set with Referrals:</p> <ul style="list-style-type: none"> - Have all FNA data ready on arrival. - New Associate's Top 25 List. - Client Referrals.

Fundamentally Sound
<p>In and out of the home in MAX 90 minutes:</p> <ul style="list-style-type: none"> - Hold all questions. - 20 min. MAX Pres. - Know the FNA (PDR) - Trainer/Trainee well rehearsed

Time Management
<p>Compress Time Frames:</p> <ul style="list-style-type: none"> - Right Market = In-home KT - Wrong Market = At Office Appt. - Prime Time reserved for RESULTS driven activity - Non-Prime Time reserved for SERVICE activity

Leadership
<p>Self Improvement:</p> <ul style="list-style-type: none"> - Green and Growing - Ripe and Rotten

TIME MANAGEMENT

Double Booking...Maximize your Time as a Field Trainer

Noon

12:15

12:30

12:45

1:00

1:15

1:30

1:45

2:00

2:15

2:30

2:45

3:00

3:15

3:30

3:45

4:00

4:15

4:30

4:45

5:00 Joe and Mary Smith – 1st Appt / Tom & Kathy Jones – 1st Appt

5:15 555-1313 555-1212

5:30

5:45

6:00

6:15

6:30

6:45

7:00 Ken and Sara Miller – 1st Appt / Mark and Sue Wilson – 1st Appt

7:15 123-8876 123-8765

7:30

7:45

8:00

8:15

8:30

8:45

9:00 Don & Geri Clancy – Carryback/Close

9:15 453-9282

9:30

9:45

10:00

NOTE: Rarely do I find it EFFECTIVE to “Double book CLOSES!” They Usually Keep!

TIME MANAGEMENT



8 STEPS TO EFFECTIVE TIME MANAGEMENT

***If you do not use a
LIST, you will find
yourself
responding to the
urgent, instead of
doing the
important!***

- Brian Tracy

1. **SMART GOALS** – Specific, Measurable, Achievable, Realistic, Timed
2. **Clear,**
3. **Detailed plans.**
3. **Make a list every single day!** First, plan your week in advance, then every night, make a list of what is to be done that day. **Refuse** to do anything that is not on your list. Every new assignment must be put down on the list.
4. **Set priorities.** What is the most valuable use of my time, right now?
5. **Concentration** and single handling. Develop the ability to concentrate on one task **UNTIL** it is finished, *then* move on to the *next* task.
6. **Develop a sense of urgency.** Whenever you have something to do, you do it now rather than put it off.
7. **Touch paper once!**
8. **Hold yourself,** to what you say to yourself!

NOTES: