

Time Survey

Name: _____

Business Day Start _____
Business Day End _____

Mon	Tue	Wed	Thu	Fri	Sat	Sun	Tot

Relationship Building		Mon	Tue	Wed	Thu	Fri	Sat	Sun	Tot
Communications with A+ or A client	Client communications by phone, e-mail or mail								0
Communications with B, C or D clients	Client communications by phone, e-mail or mail								0
Communications with prospects	Communications by phone, e-mail or mail								0
Deepening the relationship with A+ or A clients	Time spent i.e., golfing, boating, dinner, lunch, etc. (This would include A+ or A guests as referrals under this category)								0
Deepening the relationship with B, C or D clients	Time spent i.e., golfing, boating, dinner, lunch, etc. (This would include A+ or A guests as referrals under this category)								0
Relationship building with prospects	Personalized communications, special favors, professional referrals, birthday notes, random acts of kindness, etc.								0
Marketing									
Cultivating referrals with A+ or A clients	Mailings, phone calls, follow-ups with warm leads								0
Cultivating referrals with B, C or D clients	Mailings, phone calls, follow-ups with warm leads								0
Developing centers of influence									0
PR Building	Time spreading your image								0
Client Events	Time actually spent conducting client appreciation seminars, luncheons, etc. Speaking, mingling, etc.								0
Cold calling - all types	First time contact with cold leads via phone, e-mail or mail								0
Client Management									
Monitoring client goals and objectives	Reviewing client portfolios, new product, portfolio management, following investments, etc.								0
Delivering client solutions with A+ or A clients	Presentation of client solutions to the client								0
Delivering client solutions with B, C or D clients	Presentation of client solutions to the client								0
Developing client solutions	Development of financial plans and model portfolios. Researching new products.								0
Operations/Planning/Admin.									
Daily/weekly/activity planning	Time spent planning day's/week's activities. Planning client events.								0
Technology	and educating you (or staff) on technology								0
Trade executions and confirmations	Executions, confirmations and correspondence related to order processing								0
Troubleshooting problems	Handling random, unpredictable and urgent problems								0
Team Meetings									0
Staffing Issues	Hiring, training and management								0
Office/administration	Bills and bookkeeping. All non-revenue producing activities (eg. paperwork.)								0

Time Survey

Name: _____

Business Day Start
Business Day End

Mon	Tue	Wed	Thu	Fri	Sat	Sun	Tot

Personal		Mon	Tue	Wed	Thu	Fri	Sat	Sun	Tot
Personal Time During Business Day	Personal enrichment and recharge time								0
Health/Fitness - working out									0
Personal interruptions	Friends or family contacting you by phone, e-mail or other								0
Downtime During Business Day	Breakfast, lunch, dinner, visiting with staff on social level (chitchat) during business day								0
Education/Development									
Sharpening the Saw - Professional education	CE accreditation, learning and understanding new products								0
Publications & Research	Reading the WSJ, watching CNBC, going to financial web-sites, etc.								0
Talking or meeting with product sponsors									0
Miscellaneous									
Miscellaneous/Minutia during business day	If it's not one of the menu selections, it's miscellaneous								0
TOTALS		0	0	0	0	0	0	0	0

Miscellaneous Activities	
1.	11.
2.	12.
3.	13.
4.	14.
5.	15.
6.	16.
7.	17.
8.	18.
9.	19.
10.	20.

Instructions:

Track your time in 15 minute increments. The spreadsheet will total the minutes for you.

This evaluation should be performed during a time period that represents a normal 1-week period.

If you have dinner with an A+ client and an A+ prospect, split the time 50/50

Only track Personal Time items that take place during regular work hours (i.e., massage, manicure, shopping, etc.)

If you take a day off - it should be counted as 0 hours

List activities you were performing in the Miscellaneous section (eg. completing new account paperwork)

When completed, please email to akoenig@succeedwithpeak.com or Fax to Amy Koenig at (402) 334-6278.