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The Email Trap and much more.... Free up your time to work on your business priorities

You are at your desk focused and ready to work on your business and then the inevitable happens. A window pops up on your computer screen like fireworks on a Canadian summer long weekend and you are filled with curiosity. You know you shouldn't do it, but you do. Your finger subconsciously engages in a click of the mouse and in the time it takes to snap your finger your entire day is sidetracked. Does this sound familiar to you?

- **Priorities** are important activities that contribute **directly** to your personal and professional goals. Every advisor has different priorities. Depending on your business plan, one of your priorities may be to create process in the business or engage in a niche marketing plan.
- **Time obligations** are less important activities that contribute only **indirectly** to your goals. Such as answering mail, e-mail & voicemail, commuting to work, reading industry-related material and other similar activities.
- **Time wasters** include activities such as procrastination and being unorganized.

If your goal is to be more focused and productive, it is important to become aware of what your priorities, time obligations and time wasters are. Success requires spending most of your time on your priorities, less on your obligations and the least amount of time on your time wasters.

For example, your "to do" list includes 10 items. At the end of the day, eight items are crossed off the list. Next, you take the two remaining items and place them on tomorrow's list with eight new items. The next day you cross off eight items again leaving the same two remaining items and then transferring them over again to the next day.

The challenge here is that most often those eight items that were crossed off the list were time obligations and the two remaining items that continuously get transferred to the next day's list are your time priorities. The result is you never get around to working "on the business" and spending too much time working "in the business", being mostly reactive and spinning your wheels.

The following are tips to help free up time to work on your time priorities:

Design an ideal week template

Design an ideal week template (both business and personal) that works for you, your business and your family. Be sure to communicate with your team to get input. Time blocks may include:

- Practice management activities
- Team meetings and communication
- Checking e-mail
- Returning phone calls
- Proactive phone calls
- Buffer times for miscellaneous work
- Time periods for client meetings – for example, three days per week with three appointments per day, and one evening per week and one Saturday morning per month. Your teams will be responsible to recommend these times to your clients.
- Personal time (exercise, family, community involvement)
- Getting smarter time (i.e., to review important new information, news, products and ideas)
- Technical work (i.e. meeting preparation and financial planning)

When designing your ideal week template, it's important to understand how you work best.

- Do you work better in short time periods or longer ones?
- When do you have your best energy during the day? When are you most tired? What type of work will I schedule during these times?
- How and when will you refuel your body with food, recovery and movement to maximize your energy during the day?

Create a structured process for checking e-mails:

If e-mail is used properly, it can save you time. If not, it can be a time waster. Here are some tips:

- Schedule time in your ideal week template to review e-mail – for example, a 10-15 minute time block 4 times per day.
- Deactivate any e-mail notifications and alarm features.
- Resist the urge to print e-mail. Answer it, file it accordingly or delete it.

During your 10-15 minute time blocks for checking e-mail follow the **six D's of e-mail handling**

- **Delete it** - If it is not relevant or if I can do without it, then press the delete button. If you don't need to consult it within the next six months, you will probably never need it. Your delete button is one of your most valuable tools. Get rid of unnecessary clutter.
- **Delegate it** (Forward): If it is not part of your responsibilities then forward it to the right person.
- **Do it**: If it must be done and it will take ten minutes or less, do it right away.
- **Develop it**: When you are following your ideal week template with time blocks for your priorities you will receive an e-mail or two that require more than a few minutes to respond. What happens all too often is we allow that 45 minute e-mail to sidetrack our day. Is the e-mail important? Yes it is, however, it's not important at that very moment (although there will always be exceptions to this). If it is important and it will take longer than ten minutes, determine when you can do it and schedule it in your calendar during your buffer or miscellaneous time blocks. Manage expectations of the sender by responding within your 10-15 minute window telling them when you are planning to work on it and that you will respond at that time.



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- **Defer it:** These are for those emails that require you to read updates or familiarize yourself with new material and information. Rather than spending 20 minutes reading the e-mail during your e-mail timeblock, delay it by adding it to a Defer File. Schedule time in your ideal week template to read your Defer File. Maybe it's twice per week for 30 minutes or once per week for an hour. Choose a time of week and day that best suits this activity.
- **Deposit it:** If it needs to be kept as reference quickly deposit it in your filing system.

As a result of following these six Ds, you will handle e-mail more efficiently allowing you to spend more time on your time priorities.

Develop an internal communications plan to decrease interruptions

Often, your office becomes a “drop-in center” for questions from the team. Whether it is a personal or e-mail interruption, our focus and productivity decreases. It can take on average seven minutes to get back to the same level of focus you were at before you were interrupted. If you are interrupted five times in an hour, that equates to 35 minutes where you are not working with maximum focus.

To tackle this, develop an **internal communications plan** to help clarify expectations, projects and deadlines. Your goal is to be consistent with communications and hold regular meetings. For example:

Daily: Spend 15 minutes to review activities and needs of the day. If a daily 15 meeting ends up only taking 5 minutes that is okay. The key is to make sure that there is a time block to discuss key items of business. **Weekly:** Schedule 30 minutes to focus on upcoming activities for the next week.

Monthly: Commit to 60 minutes to review events, communications etc. for the next month.

Quarterly: Set aside half a day to plan new activities for the next quarter.

By understanding your time priorities, obligations and time wasters while developing a more structured approach to calendar management and e-mail handling you will increase focus and productivity in your business. Spend more time working on the activities that drive the future growth of your business.

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