Delaware Life® | National Sales Consulting

Streamline, Differentiate, Grow

Time Management Strategies

Time Management

Top advisors don't work more hours — they protect and direct the hours they have and realize that time management isn't about doing more — it's about eliminating what shouldn't be done at all.

Below are six time management best practices of elite advisors and their teams:

1. They track their time for 2–4 weeks before changing anything

- You can't optimize what you haven't measured. Log every task honestly.

2. They time-block their calendar (Theme days, ideal weeks, surge meetings)

- Divide your week into protected blocks for client meetings, deep work, prospecting, and administration
- Dedicate 30+ minutes per week to planning your week
- Review last week. Prioritize next week. Align with quarterly goals.
- Protect "deep work" hours, and say "No" strategically
- Designate no-meeting blocks. Communicate these windows to clients and staff

3. They delegate aggressively — Especially tasks below their expected hourly rate

- Calculate your effective hourly value. Refuse work below it.

4. They segment their book of business

- Tier clients by AUM, complexity, and growth fit. Match service intensity to tier.

5. They leverage AI and automation for repetitive work

- Meeting notes, CRM entry, document classification, first-draft correspondence.

6. They utilize the Eisenhower Matrix (Urgent vs. Important) to Prioritize, Delegate, and Delete

- Do, Schedule, Delegate, or Delete. ***Protect Quadrant 2***.

Below is an example of how an elite advisor might structure their Eisenhower Matrix.

	Urgent	Non Urgent
Important	**Q1 – DO NOW** Urgent + Important • Crises & Deadlines • Client call about a market drop • RMD Deadline approaching (Dec 31) • Compliance audit response due • Death-in-family client outreach • Trade error correction Advisor reality: **Unavoidable**, if you LIVE here, you're reactive. **Reduce by investing in Q2.**	**Q2 – SCHEDULE** Important, NOT Urgent • Where Growth Lives • Proactive financial planning reviews • Client segmentation & service-model design • Prospecting and centers-of-influence outreach • Tax projections before Oct 31 • Estate review cadence Advisor reality: Top performers. **PROTECT this quadrant.**
Not Important	**Q3 – DELEGATE** Urgent + Not Important • Interruptions • Routine CRM data entry • Meeting scheduling & rescheduling • Address-change paperwork • Most inbound email • First-draft client correspondence • Document classification & filing Advisor reality: Hand to staff or AI. **If you're doing it, you're overpaying yourself.**	**Q4 – DELETE** Not Urgent + Not Important • Pure Waste • Endless market-news scrolling • Low-value industry webinars • Reformatting reports nobody reads • Social media without a strategy • "Just checking" portfolio software • Meetings that should be emails Advisor reality: Wasted time. **Eliminate without guilt.**

Complete your own Eisenhower Matrix for you to complete

	Urgent	Non Urgent
Important	**Q1 – DO NOW** Urgent + Important • Crises & Deadlines *Advisor reality: Unavoidable,* ***if you LIVE here, you're reactive****. Reduce by investing in Q2.*	**Q2 – SCHEDULE** Important, NOT Urgent • Where Growth Lives *Advisor reality: Top performers.* ***PROTECT this quadrant.***
Not Important	**Q3 – DELEGATE** Urgent + Not Important • Interruptions *Advisor reality: Hand to staff or AI.* ***If you're doing it, you're overpaying yourself.***	**Q4 – DELETE** Not Urgent + Not Important • Pure Waste *Advisor reality:* ***Wasted time.*** *Eliminate without guilt.*

My Commitment — Pick One. Start This Week.

The ***ONE strategy*** I will implement first: ______________________________

My ***first concrete action*** (this week): ______________________________

About National Sales Consulting

The NSC team is a group of highly educated, experienced professionals who are go-to consultants on income and tax planning and business-building strategies. They can provide actionable sales ideas, meaningful content, and resources that are rich in education and practice management strategies as well as ways to help simplify complex planning issues for clients. The team's goal is to help financial professionals be successful.

About Delaware Life

We've made it our mission to deliver value and results to everyone we work with by:

- Building our client-focused products with straightforward features, appealing indexes, and reasonable fees—plain and simple.
- Making products available to knowledgeable financial representatives who deliver those products with clarity and integrity to help clients make smart decisions to protect their savings and build for the future.
- Creating a seamless, accurate service experience you can rely on from the first moment you contact us.

For more information on these strategies, please contact the Delaware Life National Sales Consulting team at:

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