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Coaching Financial Advisors, Entrepreneurs, and Sales Professionals to Peak Performance

Diane's Random Tidbits

Are you productive or are you just busy?

Get in your office at 6AM two mornings a week for four weeks

Close your office door and let everyone know – you need this time

Use a headset – use an iPad – use a voice activated recorder

Tear articles out – keep in a skinny folder – toss the magazines

Group adult children of wealthy clients into a one night Educ Event

Have incoming calls answered by someone – take a message

Return all calls in same block of time – have CRM open to make notes

Emails also during stated block of time

Limit social chit chat in office and lunch to a total of one hour a day

Plan your next week on Saturday morning and review briefly Sun PM

Always extend your client appt 30 minutes after they leave for you to record follow up notes and action items in a debrief fashion

Keep inbox to 25 and all others eventually purged or stored in efolders

Block out two (90 minute slots) per week for Immediate versus Soon versus Important – use this as your context for prioritizing your time

Use your Weekly Activity Form – Put personal fitness on there too

Defer non critical client work by acknowledging with your client that you will address only critical issues at the moment but you are on it
