Delegation

T.O.W.E.R DELEGATION FRAMEWORK

Using this framework allows advisors to effectively streamline their workflows and focus on higher-value activities, ultimately enhancing their productivity and success.

T	**TELL**	Clearly describe the objective and expectations for the activity.
O	**OBSERVE**	Team member observes you performing the activity.
W	**WATCH**	Team member performs the activity as you watch.
E	**EMPOWER**	Fully release the activity encouraging improvements.
R	**REVIEW**	Periodically check on adherence to the activity's objectives.

Team Stand-up Meetings

Holding a daily 10-15-minute meeting with your team allows you to sharpen your team's focus. Use the tips and sample questions below to get the most out of your daily meetings.

Tips for Success:

- Place on everyone's calendar at the same time each day
- Start and end on time
- Everyone stands which is how the meeting is kept brief
- Everyone (including the advisor) should come prepared to answer each question to the right
- Be prepared to schedule additional appointments for items needing more time

Questions Each Should Answer:

1. What's your priority today?

2. What's in your way?

3. Where do you need help?

Master Your Minutes

ROL ADVISOR

Time Blocking

	Monday	Tuesday	Wednesday	Thursday	Friday
	PREPERATION	CLIENT-FOCUS	PROSPECTING	FOLLOW-UP	FIRM-FOCUS
	Email Review & Phone Call Returns	Email Review & Phone Call Returns	Email Review & Phone Call Returns	Email Review & Phone Call Returns	Email Review & Phone Call Returns
	Team Stand-Up Meeting	Team Stand-Up Meeting	Team Stand-Up Meeting	Team Stand-Up Meeting	Team Stand-Up Meeting
9 AM	Prep for Client Meetings	Client Meeting	Prospect Meeting	Client Meeting & Issues Follow-up	1-on-1 Team Member Meeting
					1-on-1 Team Member Meeting
10 AM					1-on-1 Team Member Meeting
					1-on-1 Team Member Meeting
11 AM		Client Meeting	Business Development/Marketing Activities		Working "ON" the Business
12 PM					
	Lunch	Lunch	Lunch	Lunch	Lunch
1 PM					
	Email Review & Phone Call Returns	Email Review & Phone Call Returns	Email Review & Phone Call Returns	Email Review & Phone Call Returns	Email Review & Phone Call Returns
2 PM	Prep for Prospect Meetings	Client Meeting	Business Development/Marketing Activities	Prospect Meeting & Requests Follow-up	Working "ON" the Business
3 PM					
4 PM		Client Meeting	Prospect Meeting		
5 PM					
	Email Review & Phone Call Returns	Email Review & Phone Call Returns	Email Review & Phone Call Returns	Email Review & Phone Call Returns	Email Review & Phone Call Returns

Time Blocking (continued)

Email Review & Phone Call Return

- Email: Delete, File, Forward, Reply
- Team knows when you return calls

Daily Team Meetings

- What's your priority today?
- What's in your way?
- Where do you need help?

Meeting Prep & Follow-up

- Create meeting agenda
- Update financial plan
- Send follow-up email
- Place trades
- Send any required forms
- Assign follow-up activities

Meeting Times

- Team knows when to schedule appointments
- Allow time before and after appointment for focus and delegation
- Schedule conference room and others who should be in meeting

Business Development & Marketing Activities

- Networking: prospects, clients, COIs
- Outreach: phone, social media, email
- Marketing: event, webinar, blog, podcast, paid ads
- Client experience: events, calls, gifts, survey, referrals

1-on-1 Team Member Meetings

- Answer questions
- Provide feedback
- Delegate activities
- Continue training
- Share your top priorities

Work "ON" the Business

- Research: investments, technology, marketing
- Skills: selling, markets, lead gen
- Compliance
- Human Resources: hiring, performance reviews
- Strategy: plan, execute, review