

TIME WASTERS CHECKLIST

- Avoiding Prospecting / Lack of Confidence / Fear
- No Footholds in Target Markets / Lack of Prospecting Sources
- Too Much Time on Social Media / Social Distractions
- Procrastination / Lack of Self-Discipline / Self-Indulgence
- Lack of Deadlines / Priorities / Daily Plans / Goals
- Failure to Listen / Lack of Joint-Work / Ego
- No Consistent Follow-Through / No Activity Monitoring
- Telephone / Email Interruptions
- Too Many Non-Client-Related Meetings
- Avoiding Conflict / Not Managing Conflict
- Personal Disorganization
- Lack of Prospect Farming / Client Cultivation / Relationship Management Systems
- Too Many Outside Activities / Commitments / Inability to Say “No”
- Lack of Knowledge / Not Committing to Professional Development
- Inability to Adapt to Technology / Too Much Time on Manual Tasks
- Doing Everything Oneself / Not Delegating / Investment in Staff (Experienced Advisors)
- Untrained Staff / Lack of Staff Communication (Experienced Advisors)