

Master Time Allocation Guide

Objective: Proactively manage your calendar, stay on track with your goals, and allocate your time effectively across three key areas: acquiring new customers, retaining existing customers, and maintaining internal administration. Questions? Instructions are on the next page.

Step 1: Set Goals for the year, month, week, and quarter.

	New Customer Goals	Existing Customer Goals	Internal Goals
Year:			
Quarter:			
Month:			
Week:			

Step 2: Allocate Your Time across the three key areas. The total should equal 100%.

%	%	%
New Customer Goals	Existing Customer Goals	Internal Goals

Step 3: Add Goals to Your Master Calendar

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Find instructions on the next page.



Instructions

All your professional time will fit into one of these categories! Follow these steps to take control of your calendar rather than being managed by it:

1. Set goals for the year, quarter, month, and week. Determine activities for each category:

- **Acquiring new and retaining existing customers:** Identify goals and related activities (e.g., securing appointments, preparing for calls, traveling, generating proposals).
- **Maintaining internal administration:** Identify goals and related activities (e.g., paperwork, meetings, training).
- **Estimate the time required for all activities and then double it.** This helps account for unexpected tasks and improves time management skills.
- **List critical dates** (e.g., deadlines, milestones, meetings, holidays).

2. Determine the percentage of time to spend in each area of your MTA, totaling 100%.

3. Add activities to your Master Calendar:

- Create a Master Calendar with all fixed and regular activities.
- Record and schedule tasks to visualize discretionary time.
- Block out time for:
 - Prospecting and customer care calls and meetings.
 - Routine mealtimes, internal meetings, travel, and recurring activities.

4. Manage your calendar throughout the year:

- Plan for weekly reviews and planning sessions (e.g., Friday afternoons to review accomplishments and prepare for the next week).
- Leave some time unscheduled for flexibility. Trade time rather than steal it from your schedule when deviations occur.