

# Practice Development Series

## Module 8: Fine Tuning / Activity 1 – The Urgent Important Matrix

Aligned with the PFA™ Designation Program

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### Activity 8.1, Section 1 The Urgent Important Matrix for Financial Advisors

**Instructions:** Review the Urgent Important Matrix for Financial Advisors and reflect on a typical day or week in your financial advisory practice. How much time do you spend in each of the quadrants? What activities are getting in the way of you managing your time better? Next, answer the activity questions based on the findings from your reflection.



## The Urgent Important Matrix for Financial Advisors

	<b>URGENT</b>	<b>NON-URGENT</b>
<b>IMPORTANT</b>	<p><b>Crises</b></p> <ul style="list-style-type: none"> <li>• Unexpected market correction</li> <li>• Disgruntled client</li> <li>• Insurance (death, disability, CI claim)</li> <li>• Compliance issue</li> <li>• Unexpected personal / family health issue</li> <li>• _____</li> <li>• _____</li> <li>• _____</li> </ul> <p style="text-align: center;">Quadrant 1</p>	<p><b>Goals and Planning</b></p> <ul style="list-style-type: none"> <li>• Building &amp; maintaining COIs</li> <li>• Goal setting and tracking of goals</li> <li>• Proactive communication with clients</li> <li>• Prospecting</li> <li>• Marketing &amp; business planning</li> <li>• Tracking business results</li> <li>• Achieving activity goals (Activity Action Plan)</li> <li>• Continuing education</li> <li>• Documentation &amp; compliance</li> <li>• Maintaining &amp; refining your value proposition and target client market</li> <li>• Life-work balance</li> <li>• _____</li> <li>• _____</li> <li>• _____</li> </ul> <p style="text-align: center;">Quadrant 2</p>
<b>NOT IMPORTANT</b>	<p style="text-align: center;">Quadrant 3</p> <p><b>Interruptions</b></p> <ul style="list-style-type: none"> <li>• Interruptions from others</li> <li>• Unimportant meetings</li> <li>• Unimportant phone calls</li> <li>• Unimportant emails / mail</li> <li>• Other people's minor issues</li> <li>• Unscheduled office visitors (clients, colleagues)</li> <li>• Reactive electronic communications (email notifications)</li> <li>• Unscheduled meetings</li> <li>• _____</li> <li>• _____</li> <li>• _____</li> </ul>	<p style="text-align: center;">Quadrant 4</p> <p><b>Distractions</b></p> <ul style="list-style-type: none"> <li>• "Busy" work</li> <li>• Some phone calls</li> <li>• Your own special time wasters</li> <li>• Avoidance behaviours</li> <li>• "Escape" activities</li> <li>• Irrelevant mail or email</li> <li>• Excessive TV (Netflix)</li> <li>• Pointless web searches</li> <li>• Excessive relaxing, sleeping</li> <li>• Self critical thoughts</li> <li>• Engaging in water cooler conversations</li> <li>• _____</li> <li>• _____</li> <li>• _____</li> </ul>

The above Urgent Important Matrix for Financial Advisors is an adaptation of The Coaching Company's Urgent Important Matrix found here:





5. Identify 1 to 3 specific actions that you will commit to and incorporate into your Activity Action Plan:

1.

2.

3.