Managing Distractions [Episode 57]

Full Episode Transcript

With Your Hosts

Matthew Jarvis and Micah Shilanski

The Perfect RIA Podcast with Matthew Jarvis and Micah Shilanski

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This is The Perfect RIA, in case you didn't know. Bringing you all the strategies to help your business grow. Are you happy? Are you satisfied? Are you hanging on the edge of your seat? Sit back and listen in while you feel the beat. Another myth bites the dust…

Matthew Jarvis: Hello, everyone. Welcome to another episode of The Perfect RIA Podcast. I'm your cohost, Matthew Jarvis, and with me as always the man, the myth, the legend, Micah Shilanski. Micah, how are you today buddy?

Micah Shilanski: I'm doing excellent, Jarvis. How are you doing?

Matthew Jarvis: Good. I'm good. I'm really excited for this topic today, because I need to confess it's something that I feel that we're struggling just a little bit with in our office right now.

Micah Shilanski: Really?

Matthew Jarvis: In fact, it's going to be a topic of our offsite retreat in just a couple of weeks, and that is this idea of poor activity as it relates to interruptions, as it relates to being reactive. I shared the statistic or the quote from the blog, rescuetime.com, that the average worker spends just 2.8 hours a day on productive tasks, which to me begs two really important things. One is what in the heck are they doing the rest of the day? If they're only working, let's give them three hours, what's going on the other five hours in a normal work day? It also caused me to step back and think that, Micah, maybe you and I ... I'll just put me. Maybe I'm not really that smart or that talented. I'd just only go into the office for those three hours you be productive, then I get the heck out of the office the rest of the time. So maybe we're not that smart. If I'm not going to work, I'm not going to pretend to work. I'm just going to get out of town.

Micah Shilanski: We're just more honest. That's it. I do not say, especially when I'm talking with other people, they're like, "Man, I'd love to have your practice." Look if I can do it, so can you, because I'm not smarter. In fact, we're probably just dumber and we just own up to the fact that we're only going to work in this amount of time, that's it, and when we're not going to work, we're not going to work. I think that's honest. I think that's a fair assessment.

Matthew Jarvis: It could be. It makes me think of that book, The Millionaire Next Door, that most of these ... They highlight all these millionaires that are just, real average income, they just save a lot of money. They're not Harvard graduates. They're a mechanic that put away a lot of money, a guy that owns a farm and he just saves a lot of money, so maybe that's it.

Micah Shilanski: Jarvis, on that note, I had a quick story. Years ago, I had a client up in kind of middle of nowhere, Alaska. I was touring around doing seminars, and I met with them. Two librarians, really great people, great talk. A couple million dollars that's in there, and one's a local library. The other one's a librarian with the feds. They don't make a lot of money, but they had a couple of million dollars. Yes, I was chatting with them, and I looked at him and I said, "Bob, if you don't mind me asking, may I ask how you and Sue just accumulated so much money? You've done such a wonderful job." He looks at me like I'm an idiot, like I've asked the stupidest question the world. How on earth did you get this far in life and not know the simple answer. He's like, "Micah, it's simple. You spend less than you make."

It's one of those things that sometimes we over-complicate it, and they just made their life very simple so they could save money that's inside of there. I'm going to say the same thing as the truth with us about productivity is we just make our life so simple that when we work we work, and when we don't we don't. Is it the same thing?

Matthew Jarvis: Yeah. Maybe the equivalent expression would be don't waste your time. In fact, this blog post which we'll put in the show notes, they claim, based on their analysis, that the average worker checks their email every six minutes. Every six minutes. That means you get ... I don't know how quickly you can go back to productive thinking, but what, are you getting two minutes of productive thinking in between interruptions? In our digital world, we're bombarded with interruptions, right? People have their Apple Watches going off. You're getting an email all the time. You're getting phone calls in, text messages, all these things, and they're just strolling and productivity. We've talked about this as an advisor, but we want to talk about it as your team, and I will have a confession here.

This is not to throw my team under the bus at all because they do a spectacular job, but the other day I came back from lunch and sitting on my desk was one of those notes to call someone back. It said, "Hey, client Dave called. He needs a call back." My initial reaction, which is not my highest state of being, was like, "What the heck is this? This is a total breakdown." But thankfully I'm able to process extreme ownership pretty quickly, and I looked and said, "All right, I haven't get my team a good system here. We're in the middle of a bunch of stuff. It's kind of a stressful time. I'll let this one not slide. I won't address this right now, but we're going to address it in our offsite." I want to use this podcast almost to prepare for this offsite meeting, Micah and look through and say, "All right, how do we ..."

Let's start with easy things, clients calling in. So this example, client calls in, "Hey, I need to talk to Micah. I need to talk to Matthew." How do we let that not become a productivity killer, while at the same time focusing on our number one mission of delivering massive value?

Micah Shilanski: I think that's a great question, and we had a lot of this with the team, right? Because they would be really wanting to help the client, because we push massive value. We push high client service. We push taking care of our clients to the extreme with our team, and then it's the reaction. The client calls in and then you won't put them through to the adviser. Well, what the heck? How has that massive value? How is that helping the client? How is that a high level of service when you say you're not available for these phone calls? There was a little bit, especially when the client says, "I have a simple question. I have a quick question. I have a simple question for Micah," or for Jamie or Floyd or whoever the advisor is, right?

So we get talking about it with the teams. We had to do a reeducation process with our team, and the first one was, look, any simple question you can answer. We're not saying this from a disparaging point of view. We spend a lot of time and energy educating our team, helping them grow personally and professionally to be the best themselves they can be, so if it's a simple question, the team can answer it right away. If the team can't answer it, this is no longer a simple question. If it's not a simple question, it is a disservice to the client not to have an answer for them. That means if they put them to me and I'm unprepared for this phone call, they just transfer it back and I'm in between meetings. Bob is up front waiting for me, and I'm running in between meetings, and they try to get me on a quick phone call. I've got to cut a phone call short, and he's asking me about X, Y, and Z.

They always asks about something else that comes up in the conversation, and I can't answer either of the questions because I don't have time to look for it, how is that delivering massive value to the client? It's not, right? At least I don't feel that it's delivering massive value to the client. We had to work in educating the team on what that looked like, then we had to create a system in place in order, as we said from a our other podcast, right? Losers have goals, winners have systems. We had to put a system in place that helped the team get better at this and us, so when a client calls in, if the team isn't able to help them, they're going to schedule a return phone call with one of the advisors, whoever needs to help them, or another team member if the team member's not available.

But when they schedule that, they're also going to make sure they're asking the client, of course, what time works for them, et cetera. What's the best communication channel for the call, but also, so I can help Micah prepare for the meeting, what would you like to ask? It's amazing when you ask it that way, nine times out of 10 the client is going to ask something the team could help out with, right? That's a huge part of it is shifting. Now when the team said, "Well, I can help you." "No, no, no, I want to talk to Micah." Okay, well, let's schedule a time." We pick out a time. Great. "Oh, I want to change my address." "Oh, you know what? That's actually something I can help you with." "Or I've got a question on a distribution." "Oh, maybe that's Sharno in the office that can help you out with this." So finding a system that helps your team engage with the clients to really get the root of the question answered so they can answer it quicker, that's massive value.

Yeah, it really is. I want to highlight something that you said there. Kind of the default system in almost every office is a client calls in is, "Micah, I need to talk to Micah." Whoever answers the phone says, "Let me see if Micah's available," which is code for, "Let me see if you're important enough for Micah to talk to you." Because if they knew Micah was down the hall using the men's room, they wouldn't say, "Let me see if Micah's available." They would just say, "Micah's not available." They wouldn't go into detail, he's just not available. I hope they wouldn't go into details.

Right, I hope they wouldn't go to the detail. I don't think my team does.

Matthew Jarvis: But that's the system, right? So we kind of get in our mind, hey, a client. Something, a fire has popped up, some kind of distraction has come. We have to respond to that distraction. That is not the case. Micah, to your point, the client is much better served when your team says, "Hey, Micah's not available right now. He can call you back this afternoon at 3:00 or tomorrow at 2:00. Which one of those works best for you?" "Oh, tomorrow at 2:00." "Perfect. So that Micah can be prepared, what can I tell him this is regarding?" "Oh, I need to change my address." "Great news. I can take care of that for you." Or, "I've got a question about my Roth conversion from last year." "Perfect. I will have Micah ready to talk about that tomorrow at 2:00. Is that okay with you?" "Yeah, that's great by me." Then Micah, to your point, you can then be ready with all that information, call them on the money.

Micah Shilanski: Yeah, amen. And now what'll happen with that Roth conversion thing, right? So if the team can't answer the question, they know what information to now get to me, versus I've got to call tomorrow at 2:00 about a Roth conversion. Well, then this means the team needs to kick it to the ops team, and the ops team needs to look and answer all the questions that could come up with a Roth conversion. Did we do it, or did we not? Did we have taxes withheld? What account did it move to? Are we planning to do one at the end of the year? Has a tax projection been run, right? So there's a list of things that they're now going to check because they know it's a Roth conversion. Now I'm really prepared for that meeting tomorrow at 2:00.

Matthew Jarvis: One other small thing that this gives you, and I don't want to belabor this too far, is it gives you another opportunity to deliver on your promises. If your team says, "Micah is going to call you back sometime this afternoon," well, maybe you're available when he calls, maybe you're not. Maybe it's a good time, maybe it's a bad time. This example I mentioned the other day, I called the client back. He's like, "Oh, Matthew, I'm in the middle of painting. I'm going to just put you on speaker phone." Ugh, kill me. But if we say, "Hey, Matthew's going to call you back tomorrow at 2:00," and I call them at exactly 2:00 that's just reinforcing Matthew's office does what they say they're going to do to a T. I just don't want to let the opportunity to go to waste.

Micah Shilanski: Yep. It's a solid win, and everyone appreciates getting their stuff done. Let's pivot this just a little bit though, right? So we've got the return phone calls that come up. I know we've talked about the other pause. We went through it pretty good in here, but what about internally, Jarvis? What do you do internally with communications, because there's so many different channels they could communicate with you on, right? They could interrupt your team. They could talk to you inside your office. You have in person communication, they can email you, they can text message, they can instant message you, send you a fax. I don't know if that's still vogue.

Matthew Jarvis: Put it in the CRM.

Micah Shilanski: Put it in our project management platform and send me an alert through the phone system. Call me. Yeah.

Matthew Jarvis: We probably have a dozen different channels that are available.

Micah Shilanski: Right. So how do you handle that? Do you say to your team, "Hey, communicate with me whatever channel works best for you," or how do you structure that communication internally?

Matthew Jarvis: Yeah, and that's going to be the default by the way, is whatever's sort of top of mind. If they have their email open, they're going to send an email. If they have their text messenger open, they're going to send a text. You shared an example. This would drive me crazy. Send an email, then a text be saying, "Hey, I sent you an email. Be sure to check it." That's just a crazy-

Micah Shilanski: No, no, no, you missed it. You missed the phone call. You missed the phone call. You want to piss me off fast, send me an email, then send me an instant message or a text, then call me and tell me you sent me an instant message.

The instant message says, "Check your email," and the email is asking you about a question that doesn't matter whatsoever. Oh, it just sets me right off. Yeah, sorry.

Matthew Jarvis: Yeah, if it was something that was so urgent that warranted a phone call, why did you send an email? If you say, "Hey, the client is in the hospital, and they're going to die in 10 minutes, unless they get a call back from you," great, well then call me directly. Don't send me an email to go back to. So back to your question, what I've been really working with what we've been working with as a team, we've been using Stephen Covey's Four Quadrants of ... I don't know what he even calls it. Four Quadrants of Communication, this thing of is it important and urgent? Is it important, not urgent? Is it not important and not urgent? Urgent and unimportant? So you can look this up, Steven Covey, Four Quadrants.

What I'm really working with my team is very few things are actually important and urgent, right? There are plenty of things that are urgent, right? The phone rings, it is urgent to answer that phone call. It's not necessarily an important call. If you want to update me on the status of a project, that is not urgent. I don't need an alert on that. That can go into the task management. We're always trying to solve for how do we not interrupt another team member? How do we not destroy another team member's productivity? Just because it's top of my mind does not mean it needs to be top of anyone else's mind.

Micah Shilanski: There's that book out there, Deep Work, right? It talks about getting into the groove and getting into task or something, and I'm sure I'm going to get this wrong, the concepts there. It takes like an hour to an hour and a half of time to really get involved inside of a task to be at a high performance level inside of that task. So if I'm working, if I'm doing something, or if a team member's working and I go and interrupt a team member, right? It doesn't have to go up the chain. It could go down. If I go interrupt a team member to change something directly, I have now broken that deep work concept. If they were doing a big project and something, now they're not very effective or productive with their time. So this is respecting everyone's way to work efficiently, so I love this four blocks, but how do you implement it, right? So you've got the four blocks, the do, decide, delegate and delete, right? But how does your team use that in your communication?

Matthew Jarvis: Yeah, just a couple of hands on tools. One is scheduling time on my calendar. So if you need to discuss a topic with me, a project, whatever it is, if we need to have some interactive time on that, then put a block of time on my calendar, 30 minute block to discuss this, whatever the topic is. Don't just walk in and spring it on me, because I'm not going to be thinking about it. You're interrupting my deep work. If it doesn't require face to face interaction, then just put an update in the project management system. "Matthew, here's the status of this. I need this decision." Put a due date, "So I need this decision by Friday. Here's what I recommend that you do."

I really never want to get emails from my team unless they're forwarding something to me that's really important, but that's very rare. The only time I want to get a phone call or a text message or if it is in fact something that has to be handled in that moment. For example, right now everybody except Dee is out of the office this week, because it's holiday week. Dee only has so much decision making authority in there, so there's more things that come up, but it's very rare that there's something that needs my attention or really anyone in our office's attention within an hour or even a day.

Micah Shilanski: Yeah, so I like that. So what we do is we kind of break down our communications. We do similar. I don't use the Stephen Covey kind of thing, but it's the same concept. So we have phones, we have email, we have CRM project updates, and then instant messaging in the office. Especially since we have a displaced workforce, IM is kind of nice when we need to get phone calls or whatnot set up, but so that's our communication platform and what we've done with the team is go down and say, "What's the best way to communicate?" We've put time as really the big thing. When does the decision have to be made? This is the easiest thing for me to communicate with the team and for the team to kind of understand as well.

If a decision needs to be made right away, then call me or instant message me, right? I mean, get my attention. If something is coming up that's so urgent, I need to make a decision right now. Again, what are the odds of this, right? Fairly low, but this is super important to lay out to the team, because if you tell the team you can't talk to them for a week, talk about freaking out your support staff. They don't feel they can reach you. They don't feel they can communicate with you. It's going to create a lot of problems, so give them an opportunity. "Absolutely, you can call me if X happens, if Y happens. Please get ahold of me. We'll make sure this is tended to."

So we talk about that. Then we talk about emails. I'm trying to get away from email as much as possible. I haven't figured out a way to fully get rid of it, but once I do, I think I'll be liberated and flying around the world. I just cannot wait till it's gone, but email is mail, so it's not instant communication. So I get to it about once a week. If you're going to email me something, I will respond to it, but it'll be somewhere between four to seven days, so let's make sure it's not instant.

Matthew Jarvis: Micah, hang on a second. I want to make sure I heard you correctly. So you check your email account once a week?

Micah Shilanski: Correct. Now, sometimes it's two, I've got to say. I'm really trying to get to that once a week, but yes, that that is my goal is to get it down right now to once a week I'm in my email, and that's it unless I know I have to go find something.

Matthew Jarvis: Sure, sure. But we talked about or we saw this study, the average worker is checking their email every six minutes. So you've gone from every six minutes. I'm not going to do the math on this because I'll get it wrong, to once a week. I try to think about the sheer volumes of time. Now, I can hear portions of the TPR audience screaming out, "But wait! But wait, Micah, and what if there's a critical email that comes in and you don't check it for a week? Won't the client be angry that you didn't respond for a week."

Micah Shilanski: Okay, well here's a critical email that came in. I was out traveling in Japan and Merrill Field, the airport where I keep my airplane, sent an email saying, "Hey, I've got to move my airplane within a couple of days." They've sent me two emails that I haven't responded, because they went to spam. They sent me two emails. I hadn't responded, but I had to go move my plane today and I'm in Osaka, so I was like, yeah, that ain't going to happen. So sorry that you changed your plan, and guess what?

Nothing happened, right? I emailed him back. I said, "Hey, I'm out of town till this. You're just going to have to leave the plane there. You're going to have to figure it out. I'll be back in December." Nothing happened to the plane. Everything was fine.

Again, it was mail. They had my phone number. If something came, they could have called this. This isn't something really big. Now, I will say I do have ... So my little hack on this though, I do have Victoria look on my email for client emails. We try to get most of our clients, if not all of them, to jump into using our client email account, which is exclusively for clients, but she does look at it just in case a client does email that she could forward it to a client box and make sure it's tended to.

Matthew Jarvis: How often do you engage? How often does Victoria check your email account?

Micah Shilanski: I want her to look at it every day, so once a day in the morning to review it for client emails. That's the thing, because I don't want those to sit.

Matthew Jarvis: Yeah, so your email account is being checked daily. It's not that you've handed off the alerts to somebody else, so now somebody else is checking your email every six minutes. So I would agree, somehow your email account needs to be checked on a daily basis, because there is a risk that a client email would go in there that needs to be looked at. No one needs to be seen alerts on a regular basis. In fact, I'm tempted in our office just not allow anybody to have any email alerts, period. I cannot think of an email that would come in that is worth interrupting your time that couldn't just be checked if you checked your email twice a day or even, heaven forbid, three times a day. I just can't think of any emails that need to be checked more often than that.

Micah Shilanski: Not to belabor this point, right, but when the post office guy comes in, do you stop everything you're doing run up there and open every single piece of mail right away?

Matthew Jarvis: Nope.

Micah Shilanski: Why the heck would you do it every six minutes? Why would you do it on your car? It's a mail. It's mail, right? This isn't an application. This isn't a process and, yes, there's alerts that get through there. I get that, but it's mail. You have to be more productive with your time. So I say shut off all alerts. If there's an email alert that goes off, I get pissed in the office. I'm like, turn that crap off. You don't need it.

Matthew Jarvis: A couple of hacks here that I would throw out. If you have been in a habit of responding to emails the second they come in, if you change that dramatically, people are going to notice that, so you need to have an approach. Tim Ferriss has a great auto-responder that he recommended that if people email you, they get an autoresponder saying, "Hey, to be more productive and to serve my clients better, I'm only checking my email once a day. If this can't wait 24 hours for a response, please call me and I'll take care of it that way." I also do this hack. If I'm in checking my email once a day and there is an email that just came in a minute before, I will use that delay send option. I won't let it go out until the next morning, because I don't want people to think that they can get ahold of me and I'll respond right away. So it's a small thing, but it makes a big difference.

Micah Shilanski: Yeah, and we've talked about before, but using a client's email address. Whatever thing you want to set up, so have your team do that is a great way. And then the other thing with our team that we set up is time to review stuff. I got a little bit out of the habit of this when I was traveling internationally, but once a week chatting with the team, so if anything comes up, they know when they're going to get me, especially when I'm out of town for a bit. They know on Tuesday mornings we're going to have a quick call, we're going to go over this. Everything is either in the CRM or in the projects, so when I want to work on projects, when I want to check the CRM, I can jump in there and I don't get bombarded with all my emails.

I go into a project that's just for The Perfect RIA and I say, what's up? What are we running on? What do I need to answer? Boom, that's there, and I can focus my time just on The Perfect RIA. If I'm jumping on marketing, I can go right into our marketing project, and that's all I see. That's all I'm working on is marketing, so that deep work concept, I don't have to jump in my email, and now I've got 50,000 emails from 6 million other people that now I'm jumping back and forth on tasks on. I can focus just on one event. That is one thing that Tori, I've got to say this is the power of an executive assistant, she really helps me out on is those types of emails. If I get anything, she'll drop it right in the project so I can work on it and respond to it when it's appropriate. Super powerful hack.

Matthew Jarvis: Yeah, one other email hack, and then I guess we'll change gears. For you or your team, the software program Sane Box, S-A-N-E Box is an incredibly powerful tool. I hear from advisors all the time is the best piece of software I've ever owned. I think it's like $10 a month or something. Look it up, Sane Box. Again, we unfortunately have an affiliate link so we don't get the 10 cents to sign up.

Micah Shilanski: Dang it. We're going broke on this podcast. We're going backwards every day. So let's change this gear a little bit. One thing we've implemented in the office this last year about communication, so I'm a high D when it comes to the disc assessment, right? My personality, or like a quick start, I'd be like 11 out of 10 right? So just kind of really, really fast pace, and one thing I can't stand is getting the story with things. Because someone comes in, and you get a good relationship manager that's really good with people, and they love the story, which makes them a great relationship manager. They can relate to people, they can talk, they can do all those things, but if I'm in the office and go mode and the relationship manager, who I love. They do a phenomenal job, or even my ops team, if they come in and start telling me the story about what happens, I'm going to go nuts, right?

Or if they put something in CRM for me to look at and it's this whole diatribe of everything that happened with Starbucks and a coffee, then Jane called and I got a call back, this whole thing, right? I'm like, get to the point. So we had to work with the team that I wanted to be able to hear their story when appropriate, but I needed a good communication policy. We came up with this thing called ... It's three different things, and it's a template that we use.

One is BLUF, which I hate the acronym, but it's bottom line up front. So now anything that we get in electronic communication, it says BLUF: and what's the bottom line. Then underneath that it says COA, course of action: and then what needs to happen? Do I need to make a decision? Is this a random FYI, but a client meeting's coming up, so I should know about it. If a decision needs to be made, what's the team's recommendation and why? I love empowering the team to make recommendations to me on what they think would be best in the circumstance, and then the description. Then below that is the story, so if I need more details and if they want to tell me more details, awesome. They get to put it in there. I get a look and say, "What am I looking for? What decision do I need to make," I could get into the details. It's really helped the team kind of across the board with our communication, so if you don't have something like that, I really encourage it.

Matthew Jarvis: Yeah, I would completely agree. That's a great tool. To you point, I'll give you just one of the example on point of details. Whenever we're doing client events, I really don't want ... I have standards. We have a one page policy on client events. I don't want to know about which food options were available. I don't want to know about the room layout, unless there's an issue. If they come and say, "Well, our caterer just went out of business. We have to find a new caterer." Okay, well let me know about that. Otherwise, I don't want to know about those things. That is not the highest and best use of my brain power. Like you, Micah, not only is it not the highest and best use, it just straight up drives me crazy. I don't want to hear the story about it. It doesn't help me with my decision making. It distracts me from things that I could do.

Micah Shilanski: One of the things that was, I think the first time we met it was at Moses Lake. We were in your condo at Moses Lake, and you guys are having some the kitchen remodel or something, right? So you had plywood up on the tables or on the counters or something like that. I remember we were off doing something and you guys got a call on that, and Jackie, your wife, was talking to the contractor. She's going through the details and she goes, "Wait, hold on a second. This is a problem. I have a phenomenal guy that all he does is take care of problems. I'm going to put him on the line, because he addresses all problems." She hands the phone to you, and you wanted nothing to do with the story, and you just solve the contractor's problem like that, right?

But that's really what we're good at. We're good at solving problems. You give us an obstacle, you give us a problem, we're going to dominate it. That's how you need to operate. If that's how you're wired, focus on that. Get that communication policy that does it. I thought between you and Jackie, it was great. She was handling all those little details, but it came to a problem, came to you, you solved it, handed the phone right back to Jackie and she finished it. It was beautiful.

Matthew Jarvis: Yep, that's one of our superpowers. Another tool that I think, and we're kind of bouncing around a little bit. For scheduling, I see endless emails going around on scheduling. Complete waste of time, huge frustration point for people. If you're scheduling somebody, either you get them on the phone and you say, "Pull up your calendar, I'll pull up my calendar, and we'll put it on," or you send them a link to your calendar. Either that's through Outlook or Gmail or Acuity or Calendly or through your CRM. You will never email a client. No one in your office will ever email client saying, "Here's four times. Tell me which time has worked for you," and then they respond, and that time has gotten taken. That doesn't happen. Either, "Here's a link to my calendar. Call me or I'll call you, and we'll put it on."

Micah Shilanski: Yeah, and you as the advisor should not be making appointments.

Matthew Jarvis: No, I will never, even if I'm on the phone with a client, because we had a phone meeting. "Matthew, I want to come in and see you next week." "Perfect. Let me hand you over to Colleen. She does all the scheduling." "Matthew, don't you have your calendar there?" "I do, but if I touch it, it breaks. Colleen does all the scheduling. It's awesome." "Well, okay. I guess we'll talk to Colleen." That's the exact lines I use.

Micah Shilanski: I say the same thing. I just lead with that. I'm like, "You know what, I'd love to book an appointment. Every time I do it, the girls, I get in trouble from them because I always screw something up, so if it's okay, I'm going to stay out of trouble and just have them make it." They're like, "I could see that."

They don't even object to it, so they automatically know. So, boy, this has been a lot of fun, but this podcast is all about action items, right? So, Jarvis, what are some things that advisors can take from this podcast today and start implementing in their practice?

Matthew Jarvis: Yeah, the first one I would say is you need to turn off all forms of alerts, interruptions, distractions, popups. Just try for a week, turning that off. Micah, you and I talked about this. The only two exceptions I think I would make to them, you and I both have calendar alerts that pop up like, "Hey, in 15 minutes, be ready for this meeting," because we're both very diligent on scheduling, and then text messages, but very few people have that number.

Micah Shilanski: I'll put Jarvis' cell phone number in the show notes, by the way.

Matthew Jarvis: That's right. Yeah. High five. Even when I'm working on focus time, my cell phone's in my drawer and I can't hear the alerts, because I don't want it to distract me when I'm working. But that's it. I have no email popups, no IM messages, no dinging, no anything.

Micah Shilanski: Yeah, and if I'm doing deep stuff like that too, I'll kick the DND in on all my computer because I run a Mac. That's inside of there, so again, I only have those two popups I'll enable DND when I need to just to make sure I'm not getting distracted, so I can focus on stuff. Because again, we're all working the same amount of time, right? Go back to that study. The question is do you actually want to play when you're supposed to be playing and work when you're supposed to be working, or are you just going to dink off the entire time and have no time for play?

So I would say a second action item, create an internal communication policy and this is going to be a living document, right? As new communication comes up as team comes up, what works best for you, but a nice little one pager. How can the team best communicate with you, and what time expectations? So for us, I talk about is it email, is it phone, instant message project? When can they expect a response, so they know when they should communicate with me? That's a big one.

Matthew Jarvis: Yeah. I think on that one pager, some examples of kinds of communications that go down different channels, right? So an urgent client issue, if it is in fact truly urgent, this is the channel. If the SEC shows up for a surprise audit, here is the channel. If you're trying to update me on the next client event, that goes in the project management system. I don't get an email on that. I don't get a text. I don't get a phone call. I would, kind of to piggyback on that, I would also schedule times to do communication. When will I check my email? When will I meet with my team? When will I update the project management system? Those all have scheduled times in your calendar, so that it's not like, "Oh, I don't really want to do this project I need to do right now. I'll go check my email, or I'll go walk in and talk to Colleen and see what she's up to." It just all has to be good. It has to be intentional.

Micah Shilanski: Yeah, it absolutely has to be intentional, that you're looking at it, that you're focused on that side. Client requests as well. If you don't have this already set up, I'd say that's the third one to do, because that's the other thing that could come up with our time. Again, and we get paid working with clients, right? We get paid taking care of clients and solving the problems, so these are really important. What's your policy for handling it? Consistency is what people want, consistency with your team. They want to know when they can get ahold of you. They want to know when you're going to respond? When do you normally update projects? This is going to help them consistency with your clients, right? It doesn't have to be instant, it has to be consistent. How was email handled? How were phone calls handled? Be very consistent with that. Clients really like when they know what to expect.

Matthew Jarvis: Very good. Now, for our last action item is a fun one. We mentioned this on the last podcast. Go ahead if you haven't already or if you have, give a five star review to The Perfect RIA podcast. Take a screenshot of that. So if you've been one of the many, many dozens of people that have already given a five star review, give us another one, or pull that one back up. Do a screenshot, throw it on LinkedIn or Twitter or Facebook or any of those social media channels. Tag The Perfect RIA so we see that, and then our team will send you the new soon to be released Perfect RIA tee shirts, which we are very excited about. It's really a lot of fun. I love the swag. Because that's fun and it kind of stokes our ego, that's great, we will also send you our list of everything that Micah and I have delegated in the last year to give you some inspiration on things that you can start delegating in your office.

One other quick announcement, Micah and Coach Joe Lucas will be doing an event in November, a live event in Florida. We'll get details coming out to that. Really the best of two worlds. Boy, it's going to be a fun live event. We're going to keep it limited just a handful of people, but it's going to be the best of Micah, the best of Coach Joe Lucas on a beach in Florida. So Micah, that's going to be really exciting. I can't wait to see details come out on that.

Micah Shilanski: Yeah, I'm stoked. He's going to go through a lot of stuff. I think we're going to add a lot of value in that time together, and again, keeping it a handful of people. It's a year out, but, man, I'm getting excited about it. It'll be a blast.

Matthew Jarvis: Yeah, it really will be a lot of fun. So if you want to get on the wait list for that, you'd better send us an email. Like I said, Micah is going to keep this to, I don't know, maybe 10 or 15, 20 people tops. It's going to fill up in a second, so if you want to get on that list ... Actually, I'll just let you in on a little hint. If you want to get on Micah's list, the way to get on Micah's list is to send a check, so look up Shilanski and Associates, send a check to his office in Alaska that says "live event in November." That's how you're going to get a seat in that event.

Micah Shilanski: It does attract my attention slightly more with those little details.

Matthew Jarvis: It does. It does. Well, thank you all for listening. We really have a great time with the podcast. It's so much fun to run into the TPR nation at events. Micah, I know you just ran into a bunch people. I did as well. We love hearing from you all. We'll be doing a mailbag episode soon, so be sure to send in your questions. Really, until next time, happy planning.

Micah Shilanski: Happy planning.

Hold on before we go. Something that you need to know. This isn't tax, legal, or investment advice. That isn't our intent. Information designed to change lives. Financial planning can make you thrive. Start today. Don't think twice. Be a better husband, father, mother, and wife. The Perfect RIA. The Perfect RIA.