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Branch Manager/Office Management

10 Time-Saving Strategies for Branch Managers

By Leslie J. Thompson

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If there doesn't seem to be enough time in your day to run your branch, try some of these strategies to help you accomplish your goals.

Today's branch manager has to be a real Renaissance man or woman, demonstrating talents across a wide range of roles. As recruiter, head coach, compliance watchdog, marketing expert, and accountant, the branch manager has to juggle a myriad of responsibilities throughout the day.

This means many branch managers feel a nagging sensation as they head home from the office, suspecting that critical tasks may have fallen through the cracks or that key problems have been left unresolved. That's where yet another skill set comes in: time management. These 10 tips will help busy branch managers create a structure, establish a routine, and deflect distractions at the office so they can use every hour wisely and leave the office every evening with peace of mind.

Create a structure

"If you go way back to the '50s and look at time management approaches, not much has changed," notes Joni Youngwirth, vice president of practice management at Commonwealth Financial Network. "It's still about knowing what you want, prioritizing the different elements, making them into a list, and tracking what you've accomplished." In other words, the key to saving time is knowing how you want to spend it, and then making sure you spend it wisely. These simple steps can help you create a structure that will let you work smarter, not harder.

- **Get organized.** Peggy Duncan, personal productivity expert and author of *Put Time Management to Work and Live the Life You Want*, recommends that managers establish a set of systems both at home and at work to streamline their days. "You have to get organized," says Duncan. "I'm talking about everything from your clothes closet to your computer files. Everything around you should have some logic, so that the instant you need something, you can go right to it." Only after you create an [orderly foundation](#) for your environment can you begin to prioritize tasks, because you won't get thrown off track looking for something you need.
- **Review your processes.** Often managers think they are using their time productively, yet they wonder where the hours went when the day is over. The solution is to take an honest inventory of what you're up to while you're at the office. "I recommend people analyze what they do during the day for an entire week," says Chris Zelesnick, divisional director for H&R Block Financial Advisors. He suggests printing out a blank calendar and dividing each day into 30-minute segments. At the end of each segment, write down what you did for the previous 30 minutes. As you look at the results, ask yourself which tasks you could [delegate](#), which you could group together, or which you could do at a different time of day so they don't conflict with business. Managers also need to examine how they do what they do, notes Duncan. Ask yourself why you are using a particular system, and whether there is a way to do the task more efficiently.

Often, a simple technology solution can save you hours of effort.

- **Streamline your business.** Many managers think their producers create the most disruptions in their day, but in fact, clutter is the number one culprit, says Duncan. "We're talking about clutter on your desk, clutter on your computer, and clutter on your mind," she says. To keep both her office and her head clean, Duncan relies on a myriad of tools, from computer reminders to project binders. That way, she can access important information at a moment's notice, and she isn't [stressed out](#) by having to remember countless details. "I don't use my brain for remembering, I use my brain for thinking," she says.
- **Group like things together.** You'll find important information much faster—and save hours in the long run—if you create a logical system for categorizing your files. "It's just like in your clothes closet, you put like things together, starting with broad categories," advises Duncan. For instance, you might group all your suits from light to dark, and organize shirts from business to casual, then by color. Apply that same principle to print and computer files. Start with broad categories, like marketing, sales, and human resources, and then add subfolders for more specific topics. You'll be able to find exactly what you need in an instant, she says.

Establish a routine

Once you're organized, it's time to create a routine that prioritizes the steps needed to achieve your short- and long-term goals.

- **Structure your day.** Commonwealth's Youngwirth relies on [time blocking](#) to organize her workday. Setting aside fixed times for specific responsibilities not only ensures that important tasks are prioritized and completed but also helps your staff members plan their own calendars. For example, says Youngwirth, if you tell your team that you review paperwork every day between 1 and 2 p.m., producers will know they should not call before mid-afternoon with a question about an item awaiting your approval. Likewise, they will know to stay close to the phone during the time you have blocked out for reviewing files in case you have questions. By communicating your schedule in advance, you can prevent interruptions and endless rounds of phone tag.
- **Close your door.** If you're going to be doing anything that requires mental focus, make sure folks in your office know that you're tied up, even if you appear to be available. "I always recommend managers should have an open-door policy, but when I block off time, I shut my door," says Zelesnick. "Too many times, we only block out time for appointments. We need to block out time to do those daily activities that take up a one or two hour piece of the day. People know, when the door is shut, it has to be an issue that needs immediate attention to get me to stop whatever I'm doing at the time."
- **Train your team.** "Anytime a manager tells me they are constantly interrupted, my first question is, 'How much [training](#) has your staff received?'" says Duncan. If several people come to you with the same question, that's an indication that you should train on that issue, she notes. Similarly, ask yourself whether you have given your advisors and support staff sufficient authority to make decisions without your input. "A lot of people have a hard time delegating and do some of the simplest things [themselves] that their [sales associate](#) or somebody else could be doing," observes Zelesnick. By learning to hand off tasks to capable members of your support team, you can free up time to manage the issues that require your specific expertise. Likewise, you can spend more quality time with your advisors, who merit your attention even when there's not a crisis.

Deflect distractions

No matter how organized you are and how well you delegate work to others, interruptions are inevitable. Saving time both day to day and over the long term means nipping distractions in the bud. That requires a combination of preventative measures and practiced discipline:

- **Get a head start.** Arriving at the office even 30 minutes before the beginning of the workday can give you a tremendous leg up on future interruptions, notes Zelesnick. Knocking out one or two routine tasks during those quiet moments before the rest of the staff arrives affords you a cushion of time to use later in the day, if needed.
- **Plan for problems.** To safeguard your time, don't wait for an interruption to happen, advises Duncan. Rather, establish processes and procedures in advance to manage potential crises. Whether you're dealing with a client complaint or a power outage, knowing beforehand the appropriate steps to take can help you keep the time you spend putting out fires to a minimum.
- **Identify emergencies.** Another strategy for staying on task is to clarify with your staff which issues merit an interruption to your day and which can be addressed at another time. "Predefine what constitutes a crisis," advises Youngwirth. Although an advisor might find it imperative to come to you about a personality conflict with a co-worker, managing a petty squabble might not rank highly on your list of priorities. Youngwirth suggests discussing the topic during a staff meeting to spell out which things are truly so urgent that they demand immediate attention, and explaining to advisors that anything outside of that realm will have to wait.

Overall, getting organized, streamlining your processes, and knowing how to curtail a crisis will free up hours in your day, so you can not only manage routine tasks, but also navigate distractions.

"Planning, training, delegating—all of that is going to get you more time," says Duncan. She adds, "The [biggest thing branch managers need to do](#) is create enough time in their schedule so they can think. Because when you [start thinking](#), all kinds of wild, creative stuff starts to happen."

Leslie J. Thompson is a Dallas-based freelance writer with more than 15 years' experience reporting on the financial services industry. She has also worked as a marketing consultant for major securities firms and independent financial planners.

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