

Georgia Chapter
2026 NABIP Annual Convention

Managing It All

*Keeping the Glass Balls in the Air
(Without Losing Your Mind)*



Practical strategies for time, priorities, and getting out of your own way.

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Our Time Together

Here's where we're headed today:



The Reality Check

How do you actually spend your time?



Glass Balls vs. Rubber Balls

What breaks if dropped — and what bounces?



Priority & Focus Strategies

Practical tools you can use tomorrow



Beating Procrastination

Why we stall and how to unstick



Delegate & Empower

Getting out of your own way



Takeaways & Next Steps

RAISE YOUR HAND IF...

- 1 You ended last week with more unread email than you started with.
- 2 You've said "I'll follow up on that" to a client and then...got busy and forgot.
- 3 You've worked through lunch more than twice this month.
- 4 You handled something yourself because training someone else felt like it would take longer.
- 5 You sometimes wonder if you're busy or actually productive.
- 6 You wonder if you are growing your book of business or just maintaining it.

**We all have the same 8 hours
in a workday...the same 40
hours in a work-week...the
same 160 hours in a work-
month!**

**So, how do some people get
more done than others do?**

Time Management



The process of planning, organizing, and utilizing time effectively to accomplish tasks and achieve goals efficiently.



It involves making conscious decisions about how to allocate time to various activities, setting priorities, and avoiding time-wasting behaviors.

Time Management

Time management doesn't "just happen" for anyone – it is a skill that must be worked on, and that most people find to be a life-long challenge.



Glass Balls & Rubber Balls

GLASS BALLS

Drop them – they shatter.

- Key client relationships & trust
- Policy renewals and follow-through
- Compliance
- Your team's culture and morale
- Your agency's reputation in the market

RUBBER BALLS

Drop them – they bounce back.

- Perfecting every proposal template
- Attending every carrier meeting personally
- Answering email within the hour
- Low-priority prospect outreach
- Internal admin tasks you could delegate

The goal isn't to juggle everything – it's to know which balls are glass.



SMALL GROUP DISCUSSION

At your table, talk through:

- 1 What are the glass balls at your company?
- 2 Name ONE glass ball you've dropped (or almost dropped) in the past year.
- 3 Is there anything on your plate right now you're treating as glass... that's actually rubber?

The Priority Filter

Ask this before saying yes to anything.

DO IT NOW

Urgent + Important

Crisis, deadlines, real fires

SCHEDULE IT

Not Urgent + Important

Planning, relationships, growth

DELEGATE IT

Urgent + Not Important

Interruptions, some meetings

DELETE IT

Not Urgent + Not Important

Time wasters, busywork

NOT URGENT → URGENT



SMALL GROUP DISCUSSION

At your tables, talk through:

- 1 What is a “Do It Now” obligation?
- 2 What fits into the “Schedule It”?
- 3 What is something that could fit in “Delegate It”?
- 4 And what about the “Delete It”?

Strategies That Actually Work

No 47-step productivity system required.



Time Blocking

Block deep work for prospecting, strategy, and client relationship time. Even 90 minutes a week of protected focus changes your growth trajectory. Treat it like your most important client meeting.



Eat That Frog

First thing in the morning - at least one day a week, “eat the frog”. Do the one task you don’t want to do or the one that is the most daunting first thing - before emails or phone calls.



The Pomodoro Method

Work on one “to do item” for 25 minutes - literally set your timer. Once finished, take a 5 minute break. Do this 4 times and then take a 10-15 minute break.



Categorized “to do list”

Build out your “to do” list for what makes sense for you. By area of work or by task batching - similar tasks at the same time. The items should be action items – not generic categories.

Strategies That Actually Work



Touch It Once

Email, tasks, requests — make a decision on the spot: Do, Delegate, Defer, or Delete. Stop letting things pile up.



Weekly Review (15 min)

Every Friday or Monday: What's coming? What's overdue? What can I drop? This single habit creates clarity.



The Daily Top 3

Each morning, identify the 3 things that would make today a win. Do those first — before the inbox takes over.

What do you do to stay on task and get it all done?

Why We Procrastinate (And What To Do About It)

Hint: it's rarely about being lazy.

"It feels overwhelming"

→ Use the 2-minute rule — start with just 2 minutes. Momentum beats motivation.

"Fear of doing it wrong"

→ Done > perfect. Send the 80% version and refine later.

"It's someone else's priority"

→ Name it. Have the conversation. Push back or reprioritize openly.

"No clear next action"

→ Break it down. 'Work on client proposal' → 'Write out clear action steps.'

The Art of Letting Go



Delegation isn't giving up control — it's multiplying your impact.

What Stops Us

- 'It's faster if I do it'
- 'They won't do it right'
- 'I don't have time to explain'
- 'My client will only deal with me'

What Helps

- Delegate the outcome, not the method
- Build in check-ins, not check-ups
- Let the team own the routine pieces.
- Document the process once, reuse forever

Who Can Help

- Staff with untapped capacity
- Licensed producers who can handle renewals
- Virtual assistants or admin for follow-ups
- Carrier Reps & Partners

A few tips:

Set Time Management Goals

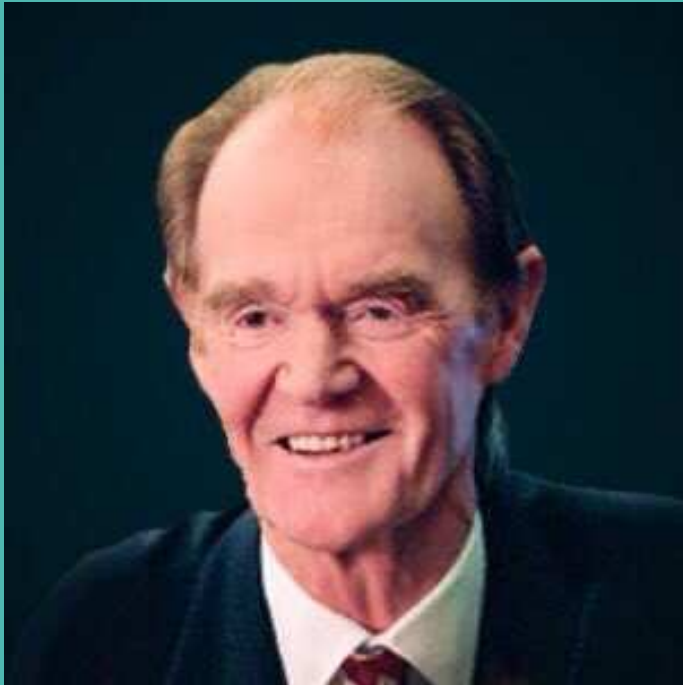
Start Small

Progress over Perfection

Find an Accountability Partner

Celebrate each Success





Brian Dyson
Former CEO of Coca Cola

5 Balls We All Juggle:
Work, Family, Friends, Health,
Spirit

Your Turn

Your Rubber Ball Bounces...everytime!

The Insurance Industry

You are high achieving, client-first and almost “always on”.

Keep this smiling rubber ball on your desk - pick it up from time to time and ask yourself if what you are stressing about is actually glass.

You really didn't get into this business to answer every email within 2 minutes - let the rubber ball remind you of that.

The most productive thing you can do some days is decide what NOT to carry.

You spend everyday helping your clients protect what matters most to them...don't forget to protect what matters most to you.

What You're Taking Home

Not a list. A commitment.

- 1 Know your glass balls — protect them intentionally.
- 2 Filter everything through Urgent vs. Important before saying yes.
- 3 Find a time management system that is right for you.
- 4 Procrastination has a reason — find your reason.
- 5 Delegation is a leadership skill, not a shortcut.



My 3 Commitments

Write it down. Make it specific.

This week, I will START doing:

This week, I will STOP doing (or delegate):

One time management tip I want to try:

You've already got this.

*Today was a reminder, not a revelation.
Protect the glass balls & let the rubber ones bounce.*

Teri Smiley, Owner

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