Workload & Task Justification Model

A structured, role-based framework for client-facing teams — built around the 40-hour workweek and designed to protect the people who power your business.

OPERATIONS DESIGN

40-HOUR FOCUS

Purpose of This Model

Work-Life Balance Driven Operations

Most workload models are built to maximize output. This one is built differently — it starts with people. The goal is to create a structured pod model where every task is clearly defined, time per task is measured, and the weekly workload stays at or under 40 hours. Work-life balance here is **intentional, not accidental**.

Define Every Task

No ambiguity — every responsibility is named and scoped.

Measure Time

Each task has an assigned time so capacity is real, not estimated.

Cap the Week

Weekly work stays ≤ 40 hours across every role in the pod.

Protect People

This model is built to prevent overload — not enable it.

Salesperson Task Breakdown

Core Responsibility: Discovery + Pipeline

The salesperson's week is structured around discovery conversations, follow-through, and pipeline development. Every hour is accounted for to keep focus high and burnout low.

Time Allocations

Discovery Calls

9 calls × 1 hr = **9 hrs**

Discovery Preparation

9 clients × 15 min = **2.25 hrs**

Follow-Up Calls & Messages

15 follow-ups × 15 min = **3.75 hrs**

CRM Updates

3 hrs

Additional Activities

Lead Nurturing

Emails & messages = **8 hrs**

Prospecting & Outreach

8 hrs

Internal Coordination

With Admin = **3 hrs**

Sales Weekly Total: ~37–39 hrs/week — fully within sustainable capacity.

Strategist Task Breakdown

Core Responsibility: Planning + Client Leadership

The Strategist owns the intellectual core of client delivery — from building initial tax models to conducting year-end reviews. The 40-hour model keeps this role focused and prevents scope creep.

Client-Facing Work

New Client Strategy Builds

6 clients × 1 hr = **6 hrs**

Strategy Review & Adjustments

6 clients × 30 min = **3 hrs**

Plan Delivery Calls

6 clients × 1 hr = **6 hrs**

Maintenance Client Reviews

7 hrs

Operations & Leadership

Mid-Year & Year-End Prep

6 hrs

Team Oversight & Decisions

6 hrs

Client Messaging & Responses

6 hrs

Strategist Weekly Total: 40 hrs/week — perfectly calibrated to capacity.

EA Task Breakdown

Core Responsibility: Implementation Execution — Each EA Carries Identical Work

Both EAs share the same responsibilities and the same workload. This symmetry ensures fairness, makes cross-coverage simple, and intentionally builds in capacity buffer for client growth.

Implementation Tasks

New Client Implementation

6 clients × 1 hr = **6 hrs**

Reasonable Compensation Reports

6 clients × 30 min = **3 hrs**

Documentation & Setup

5 hrs

Maintenance Updates

6 hrs

Support & Development

Client Data Processing

5 hrs

Internal Team Communication

3 hrs

Training & Skill Maintenance

2 hrs

EA Weekly Total: ~30 hrs/week — buffer built in to absorb growth without overload.

Admin Task Breakdown

Core Responsibility: Workflow Control

The Admin role is the operational backbone of the pod — managing routing, scheduling, tracking, and coordination so that every other role can stay focused on their core work. Without this function, the system loses visibility and efficiency.

Task Assignment & Routing

8 hrs — directing work to the right people at the right time.

Scheduling Client Calls

7 hrs — coordinating across strategists, clients, and timelines.

Workflow Tracking

6 hrs — keeping all active tasks visible and on track.

Client Status Monitoring

5 hrs — proactive oversight of where each client stands.

Document Tracking

5 hrs — ensuring files and records are complete and current.

Internal Coordination & Reporting

8 hrs — bridging team members and providing status updates.

Admin Weekly Total: ~39 hrs/week — fully utilized without overextension.

Weekly Team Workload Summary

Workload Per Role — All Within Healthy Limits

Across every role in the pod, hours are distributed intentionally. No single person carries a disproportionate load, and the entire team operates at or under the 40-hour threshold.

38/40

Salesperson

~37–39 hrs/week

40/40

Strategist

~40 hrs/week

30/40

EA #1

~30 hrs/week — with growth buffer

30/40

EA #2

~30 hrs/week — with growth buffer

39/40

Admin

~40 hrs/week

≤ 40 Hours.

Every role. Every week. No exceptions.

No role in this pod model exceeds sustainable capacity. This isn't a coincidence — it's the result of deliberate task scoping, time measurement, and workload distribution. When people operate within healthy limits consistently, performance improves and turnover drops.

Predictable

Hours are consistent week over week — no surprise overload.

Sustainable

Designed for the long run, not just the short sprint.

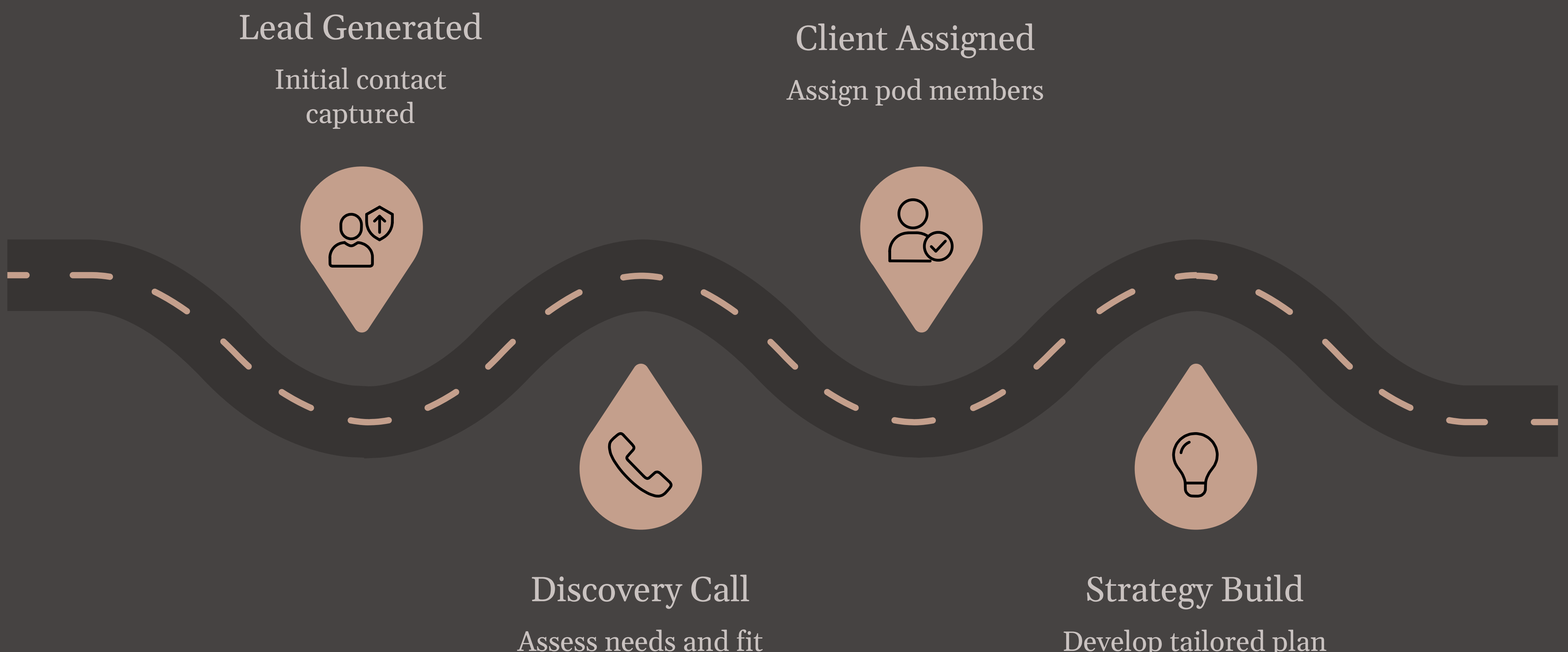
Equitable

No single role carries a burden the others don't share.

Full Client Workflow Cycle

Sales → Strategist → EA → Admin

Every client follows the same lifecycle from first contact to ongoing maintenance. Understanding this end-to-end flow is key to seeing how the pod model works as a coordinated system — not a collection of independent roles.



Each step has a clear owner, a defined time investment, and a handoff point — eliminating ambiguity and keeping the client experience consistent at every stage.

Step 1 & 2 — Lead to Discovery

Sales Takes the First Two Steps

Step 1 — Lead Generated

Sales receives an inbound or outbound lead and begins the qualification process. Before any call is scheduled, the salesperson completes discovery preparation to ensure the conversation is focused and productive.

- Discovery Prep → **15 min**
- Review lead source and background
- Set call agenda and key questions

Step 2 — Discovery Call

Sales conducts a structured discovery conversation to understand client needs, qualify fit, and set clear expectations. Admin plays a supporting role here, ensuring the call is booked and confirmed.

- Discovery Call → **1 hr**
- Qualification + expectations set
- Admin schedules call → **10 min**

Step 3 & 4 — Assignment & Strategy Build

Admin Routes, Strategist Builds

Step 3 — Client Assigned (Admin)

Once a client is qualified, Admin takes ownership of routing — assigning the client to the appropriate Strategist and placing them in the EA queue. This single handoff step prevents bottlenecks and ensures nothing falls through the cracks.

- Assigned to Strategist
- Added to EA Queue
- Admin task creation → **15 min**

Step 4 — Strategy Build (Strategist)

The Strategist builds out the initial plan, combining tax modeling and a structured strategy outline. This is the intellectual core of the client relationship — establishing the foundation for everything that follows.

- Initial tax model → **1 hr**
- Strategy outline → **30 min**
- Total Strategist Time: ~**1.5 hrs**

Step 5 & 6 — Implementation & Delivery

EAs Execute, Strategist Delivers

Step 5 — Implementation Begins (EAs)

EAs carry out the structured setup work for each new client. Tasks are well-defined and time-boxed, allowing both EAs to work in parallel and absorb volume without bottlenecks.

- Augusta setup → **30 min**
- Accountable plan → **30 min**
- Reasonable comp report → **30 min**
- Documentation → **30 min**
- Total EA Time: **~2 hrs/client**

Admin monitors progress throughout.

Step 6 — Plan Delivery (Strategist)

With implementation complete, the Strategist delivers the finished strategy directly to the client. This is the moment the client sees the full picture — and where trust is solidified. Admin handles all scheduling logistics in advance.

- Final strategy call → **1 hr**
- Admin schedules the meeting
- Client receives complete strategy outline

Step 7 — Ongoing Maintenance Cycle

Keeping Clients Supported Year-Round

After plan delivery, the relationship shifts into a structured maintenance rhythm. Two formal touchpoints per year — mid-year and year-end — ensure clients stay on track and the strategy evolves as their situation changes.

1 Mid-Year Review

Strategist → **1 hr/client**
EA updates → **30 min**
Conducted May–July

2 Admin Tracking

Admin monitors all client timelines, ensures reviews are scheduled on time, and routes any implementation updates to the appropriate EA.

3 Year-End Review

Strategist → **1 hr/client**
EA updates → **30 min**
Conducted November–December

Maintenance Workflow Cycle

Annual Client Support Timeline

Maintenance work is intentionally spread across the year to prevent workload spikes. By anchoring review cycles to specific seasons, every role can plan ahead, and no one is overwhelmed by a surge of simultaneous client needs.

Mid-Year Call

May – July
1 hour per client
Led by Strategist

Year-End Call

November – December
1 hour per client
Led by Strategist

Maintenance Implementation

All follow-up tasks handled by EAs promptly after each review cycle.

Scheduling & Tracking

Admin owns all calendar coordination and progress monitoring year-round.

Built-In Work-Life Balance Safeguards

Structural Protections — By Design, Not by Luck

Work-life balance doesn't happen because people work hard at maintaining it. It happens when the system is designed to support it from the start. These structural safeguards prevent overload before it begins.

→ **Discovery Capped at 9/Week**

Sales volume is bounded, preventing a single role from absorbing unlimited inbound demand and losing control of the week.

→ **Tasks Distributed by Role**

Every task has a designated owner — there's no ambiguity about who does what, which eliminates duplicated effort and missed handoffs.

→ **Admin Owns Workflow Logistics**

By centralizing scheduling, routing, and tracking in one role, all other team members are freed to stay in their zone of expertise.

→ **EAs Share Identical Responsibilities**

Symmetrical workloads mean either EA can cover the other, creating resilience without adding headcount.

→ **Maintenance Spread Across the Year**

Annual reviews are anchored to specific seasonal windows, preventing volume spikes and keeping weekly hours predictable throughout the year.

The Result

40	5	2x
Max Hours/Week	**Defined Roles**	**Annual Reviews**
A hard ceiling that every role is designed to stay within.	Every person has a clear lane with no overlap or ambiguity.	Structured touchpoints spread across the year to prevent spikes.

Workload Remains Predictable

Teams can plan their weeks with confidence — not react to chaos.

Stress Remains Controlled

Clear ownership and capped volume keep pressure at a manageable level.

Burnout Risk Is Reduced

Sustainable systems protect your best people from leaving.

Slide 10 — Final Outcome

Sustainable Team Design — What This Model Delivers

This isn't just a scheduling framework — it's an operating philosophy. When every task is defined, every hour is accounted for, and every role has clear ownership, the entire team can deliver exceptional client work without sacrificing their wellbeing.

Predictable Daily Workload

People know what they're walking into each morning — no surprises, no reactive scrambling.

Clear Task Ownership

Every responsibility belongs to someone. Nothing falls through the cracks.

Balanced Weekly Hours

Designed to stay at or under 40 hours — consistently, not just occasionally.

Sustainable Work-Life Balance

Built into the structure — not dependent on individual willpower.

> "This model is designed so people can perform at a high level — without sacrificing their personal lives."

High performance and personal wellbeing are not competing priorities. When the system is built right, they reinforce each other. Teams that feel protected give more — and stay longer. This is the foundation of a truly sustainable client-serving organization.

OPERATIONS DESIGN | PEOPLE FIRST | 40-HOUR MODEL