

The “Daily Plan-It”™

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Selling Clients on the Importance of Setting Simple Goals for 2010

The holidays are at an end, and for many business owners that means sales have slowed to a crawl. Many of your clients choose to use this time to sit back and reflect on their successes or failures of the last year. They “armchair quarterback” themselves over what they should or should not have done.

Stop them.

Just because a calendar year has changed doesn't mean that it's okay for your clients to be lackadaisical instead of looking for opportunities to improve. As advisors, it is vitally important to teach them that now is the best time to set personal and financial goals for 2010.

Setting Goals Can Be Simple

Encourage your clients to create two lists that can help them to make progress in both life and business.

The first is a list of their top 10 goals for the year, stated as simply as possible. This list might include paying more attention to their children, exercising more, increasing their business' marketing efforts, or paying off old debt by following a new budget plan.

(One goal you might consider suggesting is that they make sure their estate planning documents are up to date.) ☺

Of course, they don't have to finish this list in one day and laminate it! Some people freeze if they are on deadline.

Instead, suggest that they draft it out, set it aside for a day or two, and then come back to it to make revisions or additions.

Repetition and Reminders

Once they're set on their goals, they should make three copies: one for their desk at work, one taped near the bathroom mirror at home, and one miniaturized in size to carry in a wallet or purse.

This might seem silly to some, but reading your goals regularly can help ensure commitment to achieving them.

Ask your clients to share their lists with you if they are comfortable doing so. That way, they know they'll be held accountable because you'll check on their progress.

'I Never Did Mind the Little Things'

The second list is all about the little things your clients have been tolerating over the last year. Encourage them to “mind map” a list of these annoyances.

Maybe they've been so busy solving problems at home that they've come to accept working in a messy office. They might be missing a button on their favorite sweater, and they're reminded of it each time they put it on to take the dog for a walk. Or maybe their list will have the names of problematic customers they've tolerated instead of released.

Regardless of its content, this second list of tolerations will certainly grow if it is not addressed.

Your clients don't need to take an oath to eliminate all of these issues by January 2011, but they will have a much better chance of addressing most of them if they just start by writing them down.

As always, I hope this article has helped you and your clients. If you have a specific case or concern you'd like to share, please contact our office.



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