September 5th, 2017

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Racing to the 2017 Finish Line. Your team's 3-step fall check list.

Summer is over, the Fall flag just dropped and the last business lap of 2017 is underway. What's your team doing to capitalize on the weeks (about 15) between Labor Day and the December holiday season to finish strong?

For those fresh out of ideas, we've developed three steps to consider.

1.

Create a Fall Checklist board listing quantifiable client and activity goals

- Review your 2017 goals and identify what still needs to get done.
- What client account activities, such as reviews, must be completed by year-end?
- What do you and your team need to do to hit your numbers goals this year? More clients, more assets (quantify)?
- What activities will help get your team there?
- Locate your Fall Checklist board centrally in your office and review it during your weekly team meetings (make the board an agenda item).

2.

Small nudges, big results

- Which slight changes that could have a significant impact in the next 15 weeks can you and your team realistically make? For example:
- **Add one additional goal to both Client and Team meeting agendas**: For your weekly team meeting, add, "Review your Fall Checklist as a Team." For your client meetings, add "Ask Clients if they have Friends who need a second financial opinion?"
- **Lightning-round team huddle:** Complement your weekly team meeting with a 15-minute weekly early morning "Lightning round team huddle" to keep team communication strong and everyone focused. For best results, schedule the meeting for the same time each week (Example: Tuesday at 8 am), and give each team member 2-3 minutes (only) to share a few bullet points on what they are focusing on for the next day or two, what happened the previous day, and/or a couple of FYI client items (Example: "Client Y will be in the office tomorrow," or "Client X's

granddaughter just had a baby, and we sent a baby blanket from our team").

- **"We helped a client in this way" email to clients.**Turn clients into advocates for you by equipping them with examples of how your team has helped other clients this year. Of course, omit any client-identifying information in the email. These examples may jog a client's mind about a comparable situation they (or a friend) need to discuss with you before the year is over.
- **Team voice mail Fall campaign:**Split your list of clients among your entire team and place a call (or leave a voicemail) with each client letting them know your team 1) hopes they had a great summer and is thinking about them, 2) no need to call back, 3) but your team is here if needed.
- **Give your clients a goal:** Send an email to your clients thanking them for their trust in your team and letting them know you are close to meeting your annual team goals, but still need X number of new clients. Ask for introductions and offer "A second financial opinion" over a cup of coffee.

3.

Plan your Q4 gratitude

Fall flies by quickly and the holidays will be here before you know it. Have a plan for thanking your team and your clients in a manner that helps you deepen the relationship.

- **Tier A Client Campaign:** Make a list of your top 5-10% of clients and make them members of your "Tier A Client Wine Club" by personally delivering to them a bottle of wine and a thank you-card with a personalized message signed by your whole team.
- **Team Cards with Personality:** Stock holiday cards with no photo or (worse yet) a mob-like dark-suited-clad team photo doesn't scream holiday cheer. Make yours more memorable and person by having fun with the card and showing your team's personality. (Examples: Ugly Holiday Sweaters team photo; photo of the rainmaker decorated with holiday lights; photo including kids and immediate family of the team).
- **Happy Holiday Week email:** Make your holiday email distinctive by complementing the typical gratitude and holiday greetings with photoshopped versions of your team members' professional headshots—wearing stocking hats.
- **Client Holiday Event:** Holiday events that serve to say thank you and help clients get holiday To Dos completed can be effective. Consider partnering with a local charity for an in-office gift wrapping event (while clients sip wine), hosting a night out to get some holiday shopping completed, or throwing a bring-the-(grand)kids photos with Santa and breakfast party.
- **Take care of your team:** Holiday dinners for staff are nice, but extra afternoons off to get last minute shopping done as holiday gets closer can be more unique—and more valuable to those dedicated to supporting the business and clients' needs year-round.

The bottom line

The early bird catches the worm—especially in the last 15 weeks of the calendar year. Make your fall as productive as possible by creating an action-oriented Fall checklist, executing on it—and having some fun. 2018 will be here before you know it.

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