

SG and Associates

How to Tackle the Next Four Months

There are four months left to go until the end of year and some Advisors will be struggling to meet their year-end goals. Are you one of them? What can you do today to plan for the next four months ahead?

Well, as we all know, there is no magic silver bullet to increasing sales but true success comes from careful planning and strategizing. You must be willing to do the work that comes along with success and be ready to change and put yourself out there. You have to set up the correct actions and activities so that you can create a pipeline of new prospects.

Here are a few ideas to get you started:

1. Review your year-end goals and determine if you can achieve them within the next four months. If the number is not realistic, revise it so that it's within reach. You can't change the last eight months of productivity so focus on what you need to do today in order to meet your revised goals. This will provide you with a renewed sense of confidence and motivation.
2. Attend 3-5 networking events a week such as Chamber of Commerce and Rotary meetings (Tip: select those meetings/events that are frequented by your target audience). To continually build your list of prospects and Centres of Influence (COIs), you should regularly be collecting cards at events and following up with them. Be sure to have meaningful conversations with prospects and COIs so that you can reference the conversations in your follow-up. Spend more time listening than talking and always think in terms of providing solutions to their problems.
3. Make a list of your top clients. Contact them and tell them that you've been taking a look at your business and want to focus most of your energy serving top clients much like them. As a result, you're doing some research

SG and Associates

and would really value their help. Invite them to lunch or dinner for a brainstorming session to explore ways in which you could get connected to more top clients like them.

4. Go through your client database and determine which clients have not yet received an annual portfolio review. Take the appropriate actions to ensure that you set-up as many appointments as possible. Follow-up and consistency play a key role.

If you're not speaking to any new prospects in your daily activities, it's highly unlikely that you will get new clients. If you're not leaving the office at all during the day, it's unlikely you will close any sales. With four months left to go, how are you going to make it count?

Sylvia Garibaldi, Principal and Founder of SG and Associates helps financial advisors increase their business with customized marketing programs.

www.sgandassociates.ca or by phone at (647) 409-9755.