

## Unconventional Wisdom

### Action Items to Finish the Year Strong

Well, another year is coming to an end. It has been a year full of rollercoasters, so what can you do to make the most out of the last weeks of the year? How should you spend your remaining time so that you start the New Year off right? Here are our suggestions:

- ✓ Commit to meeting with at least 10 top clients not to talk business, but to talk about how they are doing and to thank them for being a client. Taking the time and meeting on a personal level is invaluable to building a relationship that goes deeper than just what they hire you to do.
- ✓ Order holiday cards and gifts for your clients early to avoid the stress of the last-minute rush. Be sure to take the time to include a personalized, handwritten note of appreciation.
- ✓ Schedule and plan a holiday event for your clients. There are endless ideas for throwing a client event. Open your home to your best clients and have an Angel Tree Party where your guests donate gifts for local charities. Hire a local chef to give a cooking class in your home or ask a local wine steward to give an educational wine tasting. Whatever you do, think out of the box and have fun!
- ✓ Identify exceptional business owners in your community and schedule a "get to know you" meeting with 10 of them by the end of the year. This is NOT TO SELL them on you, but instead TO LEARN more about them and their businesses. We're not just talking about accountants and attorneys. Look in the local paper for featured business owners. Ask your clients for names. You should ask these professionals how they started their businesses, what makes them good at what they do, what they do to provide great client service, etc. It's important to keep the focus on them. By showing an interest in them, you will make a lasting impression.
- ✓ Reflect on the past year, what were the 5-10 best decisions you made this year? Personally and professionally?
- ✓ What didn't you accomplish personally or professionally this year that you still want to do? New Year's resolutions are not just for January. You should have a list of goals throughout the year. Make a commitment to completing at least 1-2 key goals by the end of the year.
- ✓ Schedule your Annual Business Planning meeting with your team to review how you're doing. Schedule a one day off-site meeting (minimum) to plan for next year. Be sure to involve everyone who works in your business and ask them for their input. You should take this time to take a hard look at everything in your business and determine what you can improve on. This is also time to determine if your team needs any additional resources or training to do a better job at what they do.
- ✓ Look at your budget for this year. Calculate your client acquisition cost. Did you invest enough in your business for your desired level of growth? How do you define your OPTIMAL client and what should you be spending to get that client?



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- ✓ Recognize team members for their hard work. Take them and their family out to lunch or dinner to celebrate the year. Let them spend a relaxing afternoon at a spa or golf course. Give them a gift certificate for their favorite restaurant or store.

If you need any help in implementing our suggestions, please contact us. Our Business Development and Practice Management Tools provide the resources you need to make your business more efficient and valuable to you, your team, and your clients.

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