

Ten Tips to a Successful Practice

Is your business the best it can be?

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Introduction

Welcome to a user guide to create a better business. This manual offers ten tips that I believe are the most significant causative factors for success in running your own firm. Is there other advice out there just as important? Absolutely. Yet I believe that if you take on each of these tips with 110% commitment and a single minded focus, you can't help but become successful.

The road ahead to your goals being achieved requires patience and persistence. It requires more than anything else for you to believe you can do better, be better and you can have far more than you currently have now.

It may take you a year or three or five, but what person has ever complained about the timeline once they reached their summit.

Burnout is your enemy. Working relentlessly with no regard for your own mental health and physical health can result in either illness, family stress, distance from friends, divorce, addiction or a failed business. You must pace yourself. Be gentle with yourself yet stay the course. Remain disciplined and true to the goals you have set for yourself and your business. Focus on a balanced life with enough sleep, vigorous physical activity and healthy eating. Take longer to succeed but look and feel great when you arrive!

Are you ready? Let's begin your quest for success.

Tip Number One - Write a vision for your business

You have heard this sage advice over and over again.

Put a two hour time slot on your calendar in the next two weeks.

Leave your office with a pad and pen, a laptop or an iPad; whatever works for you. The important thing is to honor this commitment and be very focused and relaxed and NOT in your office. Go somewhere quiet, peaceful and restorative – a park, the beach, wherever...

This is the best thing I ever I did and I continue to do it every year end.

I have titled my vision document “20XX Strategic Plan”.

I typically include ten to twelve major goals for my business and typically five to six major goals for my personal life.

Ask yourself the following questions to get you going:

How can you love your practice?

How can you feel immense pride in what you do?

How can you earn great money?

How can you get away from work to travel, play and just have fun?

How can you make a meaningful difference?

How can you have interesting people, places and things in your life?

How can you inspire someone – does anyone inspire you?

How can you feel fit and trim and energized?

How can you ever think or act innovatively?

How can you love your life?

After careful reflection, you are now ready to write your vision:

1. Go out three years and write down in a narrative fashion all of the elements that comprise a very successful business for you. Write down everything you can think of regarding office environment, ideal number and type of clients, ideal revenues and profit targets, staffing, exposure for the firm and your ultimate steps in terms of your exit from the profession.
2. Write a one year plan describing what you want to achieve in the next calendar year. What must you do and what must be in place for you to feel fantastic about your business?
3. Based on however many months are remaining in this current year, write your vision of what you would like your entire business to look like by year end.
4. Create a QAP – Quarterly Action Plan, where you document all of your major goals. Goals are not the same as a vision. They are the supporting actions of a vision. Populate each quarter with your most significant goals.
5. Break each quarter into monthly goals and ask your staff for input. If you are a solo practitioner consider consulting a colleague or a business coach to help you with this exercise.
6. Use your calendar proactively to set goals and not merely as a repository of obligations.
7. Complete a WAF (see appendix). This document is a “Weekly Activity Form”. It is your accountability tool that you complete early Monday morning. Summarize your results on Friday afternoon. I advise you to keep your WAF in full view on your desk at all times. Keep all prior copies of past weeks and reread them every four to six weeks. This is a very effective behavioral tool when honored and completed each week. As for accountability, put an index card on your desk that asks: Do my actions match my intentions?
8. Whether you are a solo practitioner or if you operate with a staff, schedule a formal quarterly Strategic Planning meeting. Review the core areas of the firm, timelines, role clarification and accountability.

I just love this quote by Max De Pree - an authority on Leadership, a CEO and well known author:







“We cannot become what we need to be, remaining what we are.”

Tip Number Two - Clear the decks and manage your time

First and foremost, you must set aside the time (early morning, late evening and a few weekend slots) to DECLUTTER. Get rid of the piles.

Create typed labels for file folders and file non-urgent items. Put file folders out of sight and create a Master Index so they can be easily accessed. Ideally work toward a paperless, all in the cloud environment. What is most important is to purge the piles and get rid of clutter.

Place every task in one of six categories:

-  Business Immediate
-  Personal Immediate
-  Business Soon
-  Personal Soon
-  Business Whenever
-  Personal Whenever

Make a commitment to learn how to create workflows by analyzing all of your core processes. Incorporate those workflows into your CRM software. After every meeting enter notes immediately into the CRM while it is fresh. Document all follow up and flag it in the CRM.

Do not allow interruptions – be firm on this! Have a planned response at all times. If you know this interruption will never serve you well, resolve it immediately.

Schedule formally as much as you can and always allow at least one hour of buffer time per day. This time saved will no doubt get used up in an unexpected event.

Keep your desired outcome and your priorities front and center each day. Always focus on managing your time, your energy and your information. Make time for non-urgent special projects far enough out on the calendar.

Read “Getting Things Done” by David Allen – visit www.davidco.com

Make decisions with conviction and take action. Stop waffling!

Tip Number Three:

Retool all operations with a process driven approach

Break down every core function of your firm into a documented process. Conduct good research and choose the CRM that you will commit to use every day. This must be the hub and every one must have buy in for this plan to be effective.

Create workflows and checklists (or outsource to a company to do this task). Get everyone's input on process, workflow, checklists and the optimal use of your CRM.

Put one person in charge of each core function. This individual provides a detailed report on the status of their process.

When all of the steps above have been implemented, create a technology plan. This plan will address the optimal selection of the software programs to use in your practice. Analyze what you currently use. Decide if you want to replace any of these programs. Are there new programs you should consider? Plan to become fully trained and operational in each software program. Strive to understand how it can meet the needs of your business.

Become fanatical about being process driven for all core operations of the business. Convey the need for checklists and workflows with your staff. If you are a solo, reach out and network with peers and technology professionals on these issues.

Capitalize on the enhanced smooth operations of your firm as a marketing advantage. Learn how to articulate that fact to clients and prospects.

Focus on ROI. Understand the impact of your commitment to process as a means to greater productivity, profitability and in some cases incentive pay plans. To execute this in an actionable step you must create financial metrics that are meaningful and review them each month. In addition to financial metrics, there must be clear performance metrics. Your staff must fully understand your expectation of them and the job you wish them to do.

Reframe how you perceive your operations and think **PROCESS**.

Tip Number Four - Make Role Clarification a priority

What is role clarification? Simply put; who will do what by when?
Be crystal clear regarding your expectations for each employee.
Write a fully detailed job description for each position in the firm.

Assign core business functions to the appropriate individuals.
Have the staff report, share and collaborate at the weekly staff meeting.

Create benchmarks that are unique to your firm and match your objectives.
What gets measured gets done – review on a scheduled basis.

Consider implementing an Incentive Pay plan.
Consider documenting and charting career tracks within your firm.

If you are a solo, decide what roles and responsibilities you wish to continue doing and what new ones you would like to pursue.

Consider outsourcing or hiring part time help for those aspects of the business that are tedious for you to perform.

Make accountability the next most important priority as part of your office culture. Make accountability fun and not onerous. Keep accountability clear and concise.

Document the progress on executing tasks and projects. Review this helpful information at staff meetings. Examine the results of each individual against your monthly goals for the business.

If you are a solo, find someone you trust and admire. Choose someone who will help you move forward and push you with all good intentions.

Role clarification is all about every one fully understanding and being very clear on what is expected of them.

Clarity is the essential catalyst to facilitate everyone being happy and working toward a common goal.

Tip Number Five – Marketing: Get over it already

Decide right now, right this minute, that you will stop making every excuse in the book to not get out there and promote your firm.

First, identify your target market. Know it inside and out. What does the ideal client mean to you? Who is your ideal client? You can find this out by asking your clients if they know what your unique value is to them? Encourage them to expand on how you impact their life. You can also monitor and evaluate how your clients feel about your services in a formal way by giving them a survey, holding a focus group or creating an advisory board.

Secondly, clarify your message. People are not born as masters at marketing – truly they are not. Get comfortable with an easy, natural script. Your core message is your script. Know what your core message is from the very depth of who you are. Be passionate in your delivery of this message. Never let me hear you say “elevator speech” again. This is simply a ridiculous description.

Speak in benefit driven language not features based language.
Know how to paint the picture. Get good at storytelling.
What will working with you “look like?”

Revisit your website. Does the information match the message you wish to express to the world? Is your UVP (unique value proposition) clear? Does it brand you well?

Marketing is nothing more than connecting with other people. Do not make it so difficult in your mind. Let’s explore how you can be effective in marketing your business.

Decide to make a set number of marketing outreach attempts per week. What is a marketing outreach attempt? It is an email, a phone call or a coffee date. It can be a breakfast, a lunch or a dinner date. It is sending a link, an e-zine, a mailed piece, or a birthday card.

Use LinkedIn, Facebook and Twitter. Blog, use video, publish white papers, make a podcast or offer to do pro bono community work. Reach out to clients often – a quick social phone call can be a home run.

Find a great venue and hold a client appreciation event. Get involved in our professional organizations.

Keep up your outreach attempts and develop relationships over time. Circle back and keep up with the relationships you have established. Be patient with the opportunity for referrals from these relationships. Disengage yourself from being so attached to outcome and stay committed regardless of results.

Get out and speak. You can contact local organizations or find your own venue to hold your own speaking event.

You can write and publish.

When you speak or write, come from a place of contribution and nothing more. Be genuine about wanting to help and be impactful. Seek to deliver value in all that you do and say.

Always have at least four or five different irons in the fire. Select activities (focused on finding new clients) that you will execute weekly.

Create a spreadsheet or develop the pipeline imbedded in your CRM. Track your attempts and focus more on your activity than on your results. Use the horsepower available in your CRM to enhance your efforts in the area of new business development. Monitor your outreach attempts effectively.

Brainstorm new ideas, have fun, be playful, relax, no boundaries – thinking does not mean you have to do it – it just gives you the permission to think big.

Activity NOT results is your new Mantra. Come on... say it with me:

ACTIVITY NOT RESULTS

Be patient and persistent. Be professional and innovative.

My very favorite marketing book is:

“Never Eat Alone” by Keith Ferrazzi. Read it twice!

Tip Number Six - Service your clients well

Hey...no kidding, talk about stating the obvious. Well – there is a reason. Sadly, it needs to be stated so you can keep it front and center.

Do you have a systematic method for contacting all clients periodically without it being robotic and transparent? If not – stop everything and create that system within your CRM right now.

Schedule review appointments for the entire year in advance and inform the client of the months you have selected for them. Of course ask if these months are fine with them and accommodate a change if they are not.

Make the client's financial planning something interactive, interesting and genuinely all about them. Get them engaged, not mildly satisfied. Aim to have fun with the client.

Do you create a WOW experience at least periodically for all clients? If not, brainstorm on how you can achieve this level of satisfaction. Ask them occasionally if there is anything missing for them or do they wish you had done something for them? Never be afraid to go here with a client.

Have all initial paperwork reviewed carefully by two different yet educated individuals who will know what to spot. Sloppy work is never fully forgotten or forgiven by clients. It just makes you look bad.

Use a professionally constructed Investment Policy Statement. Review in depth with the client in a benefit driven language, not a mind numbing monologue.

Enter every single client data point including status, follow up, hot buttons, areas of concern, past displeasure, referral opportunities, upcoming events and anything else you believe relevant into the CRM.

Seek to populate the CRM with every conceivable and useful piece of information possible. Then revisit and examine if there is an opportunity to improve your service to that client.

Remember, if your clients are satisfied and happy they will refer you. You can begin a referral discussion with your clients in a classy and appropriate manner. This is another great way to market your self.

Tip Number Seven - Raise your fees

Of course you can only do this if you are justified in doing so. If you are servicing your clients well you are justified in doing so! Not doing so when it is fair and necessary is far worse.

So what can happen if you bring up raising your fees with clients?

One scenario is that the client can walk and you lose the revenue you had been counting on. Alternatively, the client can hear your position, understand and agree that it is in fact fair to both of you and then say yes to the higher fee.

Oh happy day! You feel like a million bucks. You feel so respected and appreciated. Your self confidence gets a boost. Before you know it you start having this discussion with more and more of your clients. Clients are saying yes. You start putting the new fee amount into your current financials. It sure does a lot for your bottom line!

So how do you raise your chances of the second and far rosier scenario?

Create your own client segmentation on Excel. Record each client, fees paid, account size, age, residence, tenure with you, referred by whom, persons referred to you and any other pertinent information. You may also add your overall comments on the client.

Once you have completed your analysis, examine the key information from this spreadsheet. Is your practice bottom heavy? Are you servicing far too many clients at far too low a fee? Are you charging market rate or far below? Do certain clients get a better deal than others? If so, why is that happening?

Are there clients you should consider referring out? If so, be prepared to have a very suitable resource for them. Assist your clients in the transition process. Learn as much as you can from this exercise to be able to move forward with more confidence in your decision to raise your fees.

Do you get nervous and immediately discount your fee so as not to lose the prospect? If this is the case you must work consciously on your self confidence. Decide with conviction that you will never, ever discount your fee again.

Decide what is fair to you and to your clients. Write down all of the reasons why this is the case. Prepare well for this discussion. Take a deep breath and speak slowly. Do not rush out of nervousness. Begin with the value in benefit driven language of what you do and who you are for each client. State the fee that now applies to their situation. Never reference the prior fee or tell them the dollar difference unless they specifically ask. Use the words upgrade or adjust in terms of their new fee. Never say “I increased or raised your fee”. State the fee and stop talking. Allow them to react. Do not be defensive if they are hostile or experiencing sticker shock. Allow them their feelings. Repeat back what they have expressed and then explain again why the fee is fair. Whether they agree on the spot or if they decide to think about it, move on to a more positive ending for your meeting.

Speak in a futuristic manner sharing with them the extent of the financial planning you will do for them. Express to your client how much you enjoy working on their behalf and improving the condition of their financial affairs. Tell them whatever they decide will be fine with you and you will do whatever they need. Let them know how very much you want them to stay with all of your other clients.

Make sure they understand that all clients are being upgraded across the board to make a level playing field for all – that is only fair.

Only if it becomes necessary and it seems appropriate, explain that you take full responsibility for undercharging in the past. Yet you simply cannot continue that practice going forward.

Be fully ready to lose a few clients (some at fees that may hurt) to make room for more ideal clients in the future. These will be correctly “priced” clients. Never ever say price to a client – it is always the fee.

When someone leaves over a fair fee it is because they got too used to getting too good a deal. There exists a credibility issue here because if they truly valued you they would not leave. Learn to articulate your value effectively.

Know where you stand with your revenues – current fees versus higher proposed new fees. That objective comparison alone will motivate you. If a client does leave, ask yourself what did you learn from the situation?

Tip Number Eight - Write your Succession Plan

Business owners are remiss in their duties if they continue to avoid planning a graceful exit as opposed to a chaotic and disappointing one. Please note that I am not addressing Disaster Planning here. That is a completely different and extensive issue.

Envision how and when you want to leave the profession.
Many intend to “die with their boots on”. Let me be clear, that is not a plan.

There are as many variations on this theme as there are business owners. There is no one correct way to transition your firm. Here is some guidance:

Pick a year that you can see yourself wrapping up your professional life or alternatively changing your vocation.

What is the best way you see to inform your clients and your staff?
Picture the impact on clients, staff and related professionals – be prepared.

Compose a short list of peers that you can envision buying your practice. Are they a good fit all around? Perhaps you admire some firms though they may not be local. Technology can be a play here.

Create your own “buyer scorecard” with your required, non- negotiable criteria. Be aware of what you consider are deal breakers and what can be negotiated in the terms you desire.

Compose a “Sell package”. This can be done in the form of a binder. Write up a historical background including when, where and how you first started the business, client demographics, five years of financials and pertinent information on your staff. Write about your target market and your referral sources. Write about the technology framework and operations of your business. Detail the strengths and weaknesses of your business. Finish with a brief paragraph on why this is a good time for you to exit the profession.

For those of you who have a staff, consider a phased in transition where you trade ownership units of the firm in return for compensation waived. Profit sharing can also be converted to ownership shares. A few employees purchasing the firm works well for a number of reasons. Many younger employees lack the capital and prefer a “sweat equity” approach. If there are two or more individuals purchasing together, it becomes incumbent upon them to work well together and become leaders in the firm.

FP Transitions is a wonderful website to explore this avenue further in detail. www.fptransitions.com

A surprise benefit of passing the baton is that the owner begins to improve areas of the business to make it more attractive for sale. Careful attention to improving the operations of the firm becomes necessary well before the sale. It is equally important to conduct ongoing business and keep the operations running smoothly. Otherwise employees and clients alike will become uneasy and fearful due to your prolonged distraction. The practice can suffer and the value will certainly decline. This entire process requires an abundant reserve of emotional energy. Begin early and proceed wisely.

How does one “hand over the keys to the shop” and ensure all will go well? You must seek to have the following conditions in place: a perfect culture fit, a realistic valuation model, a compatible strategic plan, a viable compensation arrangement for both sides, a staff who supports the decision and a script for clients.

The exit of the owner must be clearly delineated and agreed upon by both sides. The conversations with clients and staff going forward as a new firm must be one consistent message.

Begin with the end in mind and share with your staff and clients how this will be in everyone’s best interest. Yes it will be different, but not better or worse. Be positive about how the transition will unfold.

Summarize how you wish to see it happen. This will become your blueprint which is helpful considering you may have done nothing up to this point.

Tip Number Nine – Build Up Your Self Confidence

Write a document building a foundation for your self confidence.
Read this document when you review your Strategic Plan weekly.

Write down all of the things you want for yourself. Write down what matters most to you. Write down when do you feel joy, when do you have your most fun and when do you laugh really hard?

Do you think you work hard? Do you think you slack off at times?
What are the doubts you harbor about yourself? What do you think are your best qualities, not what others may say about you? What messages are you telling yourself? Sit with your answers to these questions.

Write down what you could be doing differently to make your business more successful and when you can see yourself making these changes.

Write down those personal characteristics that cause you to be upset or disappointed with yourself.

Write down how you can develop more ability in a certain area.
Write down what stops you – what is the block here?

Write down your worst fears. Go all the way to the end on this one.
Examine what you would do if you knew for sure they would happen.
Devise a strategy with a contingency plan.

Be honest and ask how likely is it that your worst fears will come true?
What are you willing to do differently to ensure that does not happen?

Why do you think others can get a “slice of the pie” and not you?
What makes them that much better qualified than you?
What messages did you grow up with that tell you “I don’t deserve more than I have now”? Are you still going to subscribe to that line of thinking?

Get comfortable conducting this type of self analysis on a regular basis.

Get out of your office more. Surround yourself with positive, supportive and ambitious individuals. Spend a lot of time with people who live life with a zest to do something remarkable. Ask them to help you take it up a level. That will be a great start in the right direction.

If you are weak or incompetent in vital areas of your work – get cracking. Stop making excuses. Do something to turn the deficit around and then be very proud of yourself for doing exactly that. Use the WAF in the appendix to keep you on course and reevaluate each week.

Lack of self-confidence or limiting self-beliefs will cause you and your business far more harm than any market meltdown or bear market ever will.

Lack of confidence is bred in lack of preparation – that is fact. When you prepare with full commitment, full focus and a burning desire to do really well, it usually ends up far better than you could ever have imagined.

Stoke that desire to set goals and pursue them.
Find someone who will support you and hold you accountable.

If you come from a place of confidence and you stop judging yourself so harshly, your confidence will catch up and go right through the roof.
“Ain’t no stopping you now!”

Don’t you dare complain that you do not want to answer all of these questions posed in this manual. Do not grumble about having to write down all of your answers in a thoughtful manner.

The most successful business people will tell you that taking the time to do this analysis was exactly why they became so successful.
It works!

So...what are you waiting for? Get to work on yourself.

Tip Number Ten – Take care of yourself

How many thousands of times do we hear that as a social expression?

So let's go there. If you had a million dollar race horse, you would feed it top level healthy food, make sure it slept a minimum of eight hours a night and you would get that filly out for vigorous daily exercise. Yet you treat yourself way worse than that horse!

The funny thing is your power to earn income is very directly related to how you feel, how much energy you have and how you appear to others. You have control over these conditions.

Do you walk around tired and fatigued?

Do you carry around belly fat?

Do you feel sluggish after consuming large portions of questionable food?

Do you drink too much alcohol? Do you smoke?

Do you drink enough water each day?

Do you mean to exercise but the start date just keeps getting pushed out?

Do you sleep less than eight hours straight through?

Do you tell yourself a big fat lie about how you are going to take better care of yourself tomorrow?

My signature closing on many of my emails is: Take care and be well.

I chose that phrase because I place a premium on feeling really good.

I want everyone I care about to care about themselves.

Pick a date. Mark the following Tuesday, Thursday, Saturday and Sunday.

These will be "I will commit to XYZ" days. Carve out time to choose any activity you wish (walk, gym, bike, run, spin class, yoga, roller blade etc).

Drink tons of water daily. Study and write your own custom and doable fifteen day food plan. Repeat the plan twice a month. Go to bed by 11PM the latest, no matter what, even if it is really wacky in the beginning and not working. Stick to it! Commit to four fitness segments in a seven day week. Is that so hard?

What could come of it? You will feel so much better. People will notice how much better you look. Your clothes will not be tight. You will have more energy. You will win back the confident and happy person you miss being.

Closing comments

You now have this user guide as a reference. This is your resource to educate you on the actions you can take to become even more successful than you already are.

It is ultimately your choice to follow the recommendations set forth in a climate of many other concerns pressing for your attention. Choosing to spend your time in a deliberate fashion is how we reach the levels of success we aspire to achieve. You can look back on your week and feel really excited about your progress. Remember that you are in control and you decide to live each day in the manner you wish.

We all know of so many people who may have passed away far too young. I try to honor their memory by pushing myself to keep going even when I am tired or overwhelmed. This serves to motivate me because they no longer have the opportunity that I do each day to follow my dreams.

I want you to first define success. The next step is to create the framework around it. Apply accountability to the goals you are setting for yourself.

All bets are off... just get started!

I hope I have been able to inspire and inform you. That is truly my passion in life. If I can help you even in the smallest way to take those first steps towards sustaining a commitment to your success, I have done my job.

I wish you joy, fun and fullness of life as you pursue your dreams.

Take care and be well.

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Week of: _____

WEEKLY ACCOUNTABILITY FORM – “WAF”

It is my intention to read my Strategic Plan document on a weekly basis. I intend to complete this form by Monday morning. The WAF is a record of my intentions translated into doable, incremental tasks that I intend to take action on this week.

I will review my actual accomplishments versus my intentions each Friday. I will share my results weekly with my accountability partner. I will keep all copies on record for quarterly reviews.

**In order to make progress on my goals for 2013,
I commit to the following tasks noted below:**

I did accomplish this week’s goals and the reason is:

I did not accomplish what I intended to accomplish and the reason is:



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Coaching Financial Advisors, Entrepreneurs, and Sales Professionals to Peak Performance

Diane's Random Tidbits

Here are three books I recommend:

1. "Never Eat Alone" – Keith Ferrazzi with Tahl Raz
2. "The start-up of you" – Reid Hoffman and Ben Casnocha
3. "Focal Point" – Brian Tracy

Here are three websites I recommend:

1. Davidco.com
2. Sbinformation.about.com
3. Wealthmanagementmarketing.net/top-10-posts-of-2010/

When reading the material above – apply it to your week.

Are you productive or are you just busy?

Get into your office at 6AM two mornings a week for four weeks.
Close your office door and let everyone know – you need this time.
Use a headset – use an iPad – use a voice activated recorder.
Tear articles out – keep in a skinny folder – toss the magazines.
Hold an educational event for the children of your clients.
Have incoming calls answered by someone – take a message.
Return all calls in the same block of time – make notes in the CRM.
Check all emails during scheduled blocks of time, not as they come in.
Limit social chit chat in the office and lunch to a total of one hour a day.
Plan your next week on Saturday morning and review briefly Sunday.
Allow 30 minutes following an appointment to record follow up notes.
Keep your inbox to 25 and purge or store all other emails in efolders.
Use your Weekly Activity Form – Put personal fitness on there too.



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3. Retool all operations with a process driven approach.
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5. Marketing: Get over it already!
6. Service your clients well.
7. Raise your fees.
8. Write your succession plan.
9. Build up your self confidence.
10. Take care of yourself.