

Six Successful Habits to Increase Productivity and Your Client Base

By: Charles Marcus

1. HAVE A PLAN OF ACTION

Real success is based on truly identifying your target markets, your ideal client base.

- √ Prepare a list of your 20 top clients and your 20 top prospects, and never let more than 30 days go by without being in touch with them.
- √ Ask your clients for referrals. Who else do they know who might benefit from what you have to offer?
- √ Plan every single day to maximize productivity.
- √ Evaluate your client and prospect base regularly.
- √ Set goals and high expectations for yourself.
- √ Work outside of the box. Be prepared to do the things other people are not prepared to do.
- √ Be prepared to work unsociable hours, weekends if necessary, doing what ever it takes to succeed.

Know where you want to go with your business. Work your plan consistently and plan to succeed.

2. BE IN BUSINESS FOR YOUR CLIENTS

Successful financial advisors know this and keep it top of mind in all their client interactions.

- √ Think not what your clients can do for you, but what you can do for them. Always focus on building meaningful RELATIONSHIPS with your clients.
- √ Do not think sale, think SERVICE. If you take care of serving your clients, the sale will take care of itself every time, and your clients will refer and introduce you to your future clients.
- √ Do not so much market your products or services, market what solutions and benefits your products and services provide for your clients.
- √ Work with your clients to help them, and you, understand what their real NEEDS are. Put the fancy brochures away at first. Get to know your clients on a personal level. Earn the right to do business with them.

Remember. People do not care what you know until they know that you care. We do business with people we like, respect and most important, who we trust.

3. GET OVER REJECTION

Rejection and disappointment are part and parcel of the daily business of a successful financial advisor. In fact, if you are not getting rejected often, you are probably not speaking to enough people, making enough calls.

- √ The failure of many potentially great sales people is taking rejection personally; remember a “no” is just a request for further information.
- √ Successful people in business do not worry about failure. In fact, they know that every setback leads them closer to success. Henry Ford wisely said, “Failure is just another opportunity to begin again more intelligently.”

Talk to enough people in a day and you will ultimately succeed. Be patient, believe in yourself, your products and services, and be proud of the organization that you represent.

4. NETWORK

How often are you out there promoting your products and services? How often do you ask your existing clients for a referral and most important, an introduction to that person?

- √ Every time you come in to contact with people is a golden OPPORTUNITY for you to promote your business both directly and indirectly.
- √ Join your local chamber of commerce, board of trade, local business networking group etc.
- √ Be seen, get involved and become known in your local community. Visibility breeds success.

“When we have the courage to dream and the commitment to succeed, a whole new world of opportunity opens up for us”

Charles Marcus

5. DEVELOP EXCEPTIONAL LISTENING SKILLS

Dale Carnegie said, “You will make more friends in two months by being interested in other people than you will do in two years by trying to get people interested in you.” Most people are not very good listeners. Truly successful people in all walks of life have a skill for listening and it truly is a skill.

- √ Make it a daily practice to do less talking and more listening to your clients. Try using the

80/20 rule. It is not easy; we all want to talk, about ourselves, about our products and services, about what we of great communication, making a connection with people, and of building successful relationships with your clients, is to listen to what they are telling you and being truly interested in them.

- √ Ask open-ended questions and then keep quiet and listen intently to their answers.

Great listening skills are one of the keys to increasing your success rate. No one has ever closed a sale while they were still doing the talking!

6. FOLLOW UP

Make it a habit to follow up with your clients and prospects. Sounds simple, right? In my experience, and surveys back me up on this 67% (amazingly) of people in business do not follow up enough. Do not be one of them.

Think long-term. Nurturing a relationship that eventually results in business takes time.

- √ Keep in touch, stay in front of your clients and prospects.. Often business is about being top-of-mind when the “buy” decision is made. Spending quality time in building and developing that relationship with your potential client is crucial and will differentiate you from the pack when a buying decision is being made. Patience is a virtue.
- √ Set an appointment to follow-up, and keep it!
- √ Return all your phone calls promptly! Keep in contact with your clients in every way possible!
- √ Often it is the little things that make a big difference. Send them a hand written note or card instead of an e-mail, send them an article you read that might be of interest to them. Personalize it, be different, and show them that you care.

To your success!
And always remember;

“It is the service we are not obliged to give that our customers value the most”

J.C. Penny, Founder of the highly successful J.C. Penny Chain of Stores in the United States

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