



## A Message from Dave

11/16/2023



### **Being Intentional is the Key to a Productive Holiday Season**

It's hard to believe, but we're now just a week away from Thanksgiving and the official start of the holiday season. Although this can be a challenging period for advisors – as people get distracted by the hustle and bustle of the season – it can continue to be a highly productive time if you work smartly and focus on being intentional.

Being intentional is my theme for the month, but I'm stressing it because it's one of those important issues that it's easy to lose sight of when you're pushing hard to meet your goals. You start to focus so much on your volume of work that you lose your focus on quality. Doing quality work starts with being intentional in all your interactions with prospects, clients, team members, and family members. Being attentive, fully engaged, and intentional in these situations invariably leads to positive outcomes, whereas being hasty and inattentive often leads to negative outcomes.

Last week I gave an example of this as it relates to your employees. Here's one that relates to prospects and – consequently – your bottom line.

As you know, using our Simplified Sales Process involves taking time between your first and second meeting with a new prospect to prepare to deliver their Retirement Risk Report – ideally in a way that leads to a close. As I noted in my November newsletter, Jay C. in our Connecticut office has closed 13 out of his last 15 second meetings, which is outstanding. What's the key to his success? Being intentional – not only in his interactions with these prospects, but also in his preparation process. He takes whatever time is necessary to outline everything he's going to say and do, and to get mentally focused on being intentional when he goes into each meeting.

This is an important thought to keep in mind as we enter the time of year when our marketing and event schedules often get lighter, and our client review schedules get fuller. Remember, it's not just about the pace you set. It's also about making sure it's a manageable pace that allows you to do quality work by being intentional. Doing so will be the key to closing your year strong and really enjoying the holiday season!

Have a great, productive week!

*Dave*

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