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A strong start for 2009

Simon Reilly / January 02, 2009



Now is the time to create a strong start for the year by creating a strong vision for 2009. This gives your business plan a foundation, allowing you to set goals you can use to reward yourself during your journey into the new year.

Without a vision and business plan, stress and exhaustion seep in, contributing to low self-esteem. A vision and a business plan, though, must go hand in hand. When you have a robust business plan without vision, there will be loads of work with little sense of direction or feeling of progress toward your goal. When you have a vision with no business plan, the result usually involves chaos and frustration.

When you have both, you become strong willed, enthusiastic and confident. To create a strong vision and the inspiration to go forward, you need to look at your past.

Schedule one or two days of uninterrupted time in a place where you can be anonymous. Get away from your business and personal life so that you are not reminded of all your day-to-day busyness.

Review your 2008 calendar and write down everything you accomplished during the year in the different areas of your business. Consider administration, computers, systems, customer service, financials, marketing, office management, planning, product development, production, sales, team building and training.

At Leading Advisor, for example, we upgraded all of our computer systems; chose to invest in our business in 2008 rather than add more clients; contributed articles to Advisor.ca; gave presentations to Advocis (Ottawa chapter), Canada Life and Funeral Plans Canada; scheduled time for quarterly reviews; published a book; created a new website; and sustained reasonable sales while we expanded our vision.

Most of all, we assisted our clients to remove the roadblocks that have been preventing them from realizing their full potential.

Next to each of your accomplishments, write down how each made you feel.

Thinking about your accomplishments and the feelings that they give you, write down the positive beliefs you have today as a result — those that will support and help you realize your vision in 2009.

For example, after we published a book to help financial advisors, we felt certain, committed and confident; we believe we will get our message out to more financial advisors in 2009.

Remind yourself of what you have accomplished. Reviewing your accomplishments will inspire you to go forward. Unfortunately, most of us forget what we have accomplished and fail to give thanks or even acknowledge ourselves for the great work that we are doing.

Imagine that it is December 31, 2009, and you are looking back at the year. Ask yourself the following questions and write down your answers: What did you accomplish? What goals did you set and achieve? What made you happy? These questions can be asked in both of the following categories:

- Personal — consider education, fitness, travel, income, relationships and your own sense of well-being.
- Business — think about your vision, administration and office or computer systems, finances, marketing, office management, production, products, sales, your team and training.

How will it make you feel to have achieved all of these accomplishments by December 31, 2009?

For me, writing a book required hours of dedicated concentration and focus — not my natural style or way of doing things! There were many times when I felt like quitting. One of the things that I did to inspire myself was to imagine that I was at the pearly gates being asked, "Is there anything that you regret not doing?" The answer was simple — I could not let my life go by without completing my book. This strategy caused me to do whatever it took, getting up early, staying up late and working many weekends during the summer months.

Once your vision is complete, create 90-day goals. These bring your vision into short-term focus. They're attainable, and they make it possible for you to reward yourself along the way. Identify or define a few short-term steps, and you can take action now, instead of getting overwhelmed with the "perfect" plan.

As you work toward achieving your 2009 goals, answer the following questions, in writing, at the end of every week: What are your top five achievements for the week? Why are they significant? How do they make you feel? What further progress could you make?

The answers to these questions will allow you to acknowledge your achievements and make adjustments to your game plan along the way.

A strong vision establishes your foundation and gives you the commitment needed to build your business and properly serve your clients.

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