



AQUILA GROUP OF FUNDS®

## TIME AND SALES MANAGEMENT TECHNIQUES

### 'KEEP DOING - START DOING - STOP DOING'

#### ***TIPS TO INCREASE YOUR EFFECTIVENESS IN SETTING AND ATTAINING GOALS***

**KEEP DOING** - *Identify the things that need to be done to achieve your goals; the daily, weekly and monthly activities that lead directly to the achievement of your goals:*

- Find and develop new relationships to grow your business.
- Qualify those prospects to see if they meet your definition – Do *they* qualify to do business with you?
- Help individuals achieve their personal financial goals, including such important life events as education, travel, retirement and so forth.
- Provide advice and peace of mind so that your clients feel financially secure.
- Set specific review and goal-setting meetings with your top clients - provide proactive advice.

It's easy to get discouraged and frustrated when these activities don't lead to results immediately. Just remember that if your business plan is solid, your sales activity success formula is based on real data, and you review and manage these sales behaviors regularly, these good business practices will lead to the accomplishment of your goals.

**START DOING** - *Remember the SMART principle; make your goals Specific, Measurable, Achievable, Realistic and Time-Bound. Turn these activities that lead to success, into personal habits:*

- Determine specific goals (include personal as well as professional). Start with 100 goals, boil that down to the top 10, and then filter out the top three non-negotiable goals.
- Have a specific plan to reach your goals and include specific activities required for success. Set "standards" for each of these activities.
- Have a process to measure achievement of these standards. Are you doing the activities required to be successful?
- Have an accountability program – hold *yourself* accountable for achieving your success.
- Have a process of reporting activities and results – set up a group of your peers and have a weekly sales huddle. Peer pressure is hugely motivating.
- Be a life-long learner. Just having been in the business for 20 years is not enough – you need to be more knowledgeable today than you were last year.
- Adjust to the marketplace. This goes beyond dealing with the volatile economic climate. Technology has changed how many people receive information – much of what you formerly provided is available on the Internet. Your role today is to help clients identify their financial goals, make the right choices to reach them, and then implement the appropriate steps.

**STOP DOING** - *You also need to stop doing certain time-consuming activities if you are going to get to the next level. Consider:*

- Stop making excuses for your lack of activity – refocus on getting the job done.
- Stop getting immersed in operations and finance. Find the right people in your organization to handle those tasks.
- Your door cannot be always open - schedule specific time for important meetings and avoid drop-ins.

What do you need to “keep doing, start doing or stop doing”?

*Source: Bank Insurance and Securities Marketing, Spring 2009, Cole, Tony. “Keep Doing, Start Doing, Stop Doing.”*