

Qii Day Activities

- Assess what you are doing, how you are doing it, and whether you should make any changes.
- What else can you take off your plate and give to your team?
- Review the results reports from your automated marketing software. Maybe you can increase the effectiveness of your newsletters, blogs or postings.
- What are the three most important results for this week?
- How is your progress toward your goals for the year? Is there a goal that you've been neglecting because it seems overwhelming? Break it down into small individual steps. Put the first small step in your plan for this week.
- Brainstorm, research and read about ways to improve your client service or streamline your back office operations.
- Spend time thinking about your best clients and how you might deepen your relationships. Play with the "Target Practice" worksheet.
- Google your clients, see what they are up to, what boards they sit on. Plan to attend fundraisers or other events related to their interests, if they also interest you.
- Look through LinkedIn "people you might know" – who should you connect with?
- How many of your clients have you LinkedIn with? Are there other people you know that your clients would love to know (same industry, interests, etc.)?
- Think of all the other people that serve your clients (CPAs, Realtors, Attorneys, Insurance Agents) – you want to meet those people. You can help each other help your clients.
- Make a list of the 5 most important contacts you can make this week that will help propel your business.

- Think about your client experience: from the moment they get your invitation to a meeting to the day after your meeting. What is it like when they call you? Look at everything from their perspective. If you were them, what would you want? Can you make the experience more memorable, more fun or interesting for them? Can you make their life easier or anticipate their needs?
- Find a way to delegate important mind-numbing work.
- Do cathartic things like cleaning off your desk, or creating e-mail filters to reduce your e-load.
- Are there electronic solutions that can streamline some of your tasks?