

PROACTIVE CALENDAR:

Team

- Enhance the team's personal connections - set up a Skype Group/ Google Group/ What's App. Use your video conferencing, if available, weekly and touch base.
- Every other week, for four weeks, a person on the team recommends an activity that the team will do together, and is responsible for making it happen!

Clients

- For four weeks- (adjust as needed), once a week have an activity - not wealth management - to share with your clients. Place this on the team calendar.
- To get your wheels turning and begin implementing, we have provided several activities to add to the calendar right away. Make sure there is an accountability person to see this through with the team.
- As you think of activities, please send us an email with an update, we will be sharing with our Pareto community; we can all benefit from sharing.

MARCH

Week 1 - March 16th

- Outgoing phone call - focus on Family, Occupation and Recreation (FOR), just listening will be a validation of how much you care. Begin with your 20%, your best clients.

Week 2 - March 30th

- Outgoing phone call - focus on Family, Occupation and Recreation (reference FOR, from the previous call), just listening will be a validation of how much you care.

APRIL

Week 3 - April 6th

- Passover begins April 8th through April 16th and Easter is April 12th. Call to wish your best clients a happy holiday and focus on FOR.

Week 4 - April 13th

- Send a beautiful lavishcards.com card with a Spring Theme, hand-write a quote or something light and have everyone sign. Hand-write the address and use an interesting stamp.
- Team should discuss the short term outlook going forward. May go to every two weeks depending on developments.

Week 5 - April 27th

- Team reviews progress and sets new activities.