

What Are Your Client's Goals?

Here is a question that you ask your clients all the time - What are your goals? They do have some, don't they? Do you know what they are? Are they hesitant to tell you? Do they wonder what goals are? Just what is a goal? In the dictionary it reads: Goal, Function: Noun. The end toward which effort is directed, the terminal point in a race.

For your clients, goals are vitally important. They are like roadmaps that help you get a client from point A to point B, acting as mileposts along the way to ensure we are staying on course and on target.

The biggest issue with goal setting is that many of your clients never bother to take the time to put a pen to paper and begin. Many of your clients have the fear that once they write a goal down they are stuck with it, as if they had carved it in stone. Somehow it eludes them that goals are flexible and change with the passage of time or with the completion of other goals.

Your goal (bad pun) is to make the process more manageable and easy for them to focus on. Short-term goals are the present, perhaps a 3-12 month window. Mid-term goals move your horizon out a little further, focusing on a 2-5 year timeframe. Finally, long-term goals can go out as far as 10, 15 even 20 years or more. Encourage your clients to dream a little bit at this level, be creative, the pictures will become clearer as the process starts and as your time frame changes. Remember, there is no limitation on the setting of goals at any stage in your life. Perhaps it's easier if I draw a picture instead?

The process is a flow; the first step is to set goals. Second, we go off and pursue them, doing whatever activities need to be done to accomplish them. At some point we take a break, visit what we have accomplished and map it against what we set as our goals. What did we learn? How are we doing? Once we know where we are, we can cross off what we have accomplished or make adjustments if required. We then generate new goals to replace the completed goals and the cycle starts all over again.

So why don't more people do this? My personal belief is that people don't understand that there is no such thing as a right or wrong goal. The fear of failure keeps them from writing them down. They feel if they tell someone what their goals are and they don't attain them, then somehow they have failed. It's not a failure to attempt to do something and not achieve it; the failure comes in not making the attempt in the first place.

When I became a client of the financial services industry over 12 years ago, I didn't immediately start writing down all my goals, it took me some time to develop the habit. Once I realized that you only get out of anything what you put into it, I realized I needed to apply myself more and measure what I was doing. Once I got the hang of it, the more I was willing to work on it, the easier it became.

Just because you create goals on paper doesn't mean you'll accomplish them all. Don't kid yourself - it takes work. Too many people associate the word 'work' with the word 'hard' and, to be frank, that might just be what stops people from beginning the process. Helping your clients achieve their goals is a fun and rewarding process, not to mention valuable for your business. End of article - now I can cross one of my goals for the month off my list.

Robert Gignac is the owner of Taynac & Associates, providing client seminars and workshops on personal and financial development, motivation, and leadership. This article is an excerpt from his first book "Rich is a State of Mind". Robert will be our featured speaker at the next Advocis lunch meeting on May 18th. As a client of the financial services industry for over 12 years, he will be sharing ideas on how to develop a better relationship with your clients.



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