



12 BUSINESS DEVELOPMENT THINGS TO DO BEFORE CHRISTMAS

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This article was first published in October 2017. Given COVID experiences of 2020 some content has been updated.

The moment those Flemington Racecourse* gates fly open and the horses start to gallop is, in my experience, the moment the countdown to Christmas begins. After all, between Tuesday, 4 November 2020 - the date of the race that stops our nation - and Christmas, there are only 51 days. Gulp.

So, if you want to know how to use the last seven weeks before holidays to grow your practice here's my list of the 12 things every professional should be doing before Christmas.

1. DRAW UP A LIST OF YOUR CLIENTS

What better way to start your list of things to do before Christmas than by writing up a list of your own?

I want you to get down the name of every single client you've worked for in the last year, no matter how big or small. Go on, search the recesses of your brain, pull up all those old emails and fee reports and figure out exactly who you've been billing for the past 12 months. When you're done, give every single client a score out of 10 based on how happy you think they are with you right now. Be honest - they're not all going to be 9 or 10.

If you score someone below 5, ask yourself why. Is it something you've done? Do you need to invest some time in the relationship? Or are they simply very hard to please and you'd rather not work with them anymore? (If so, it may be time to cut your losses and [move them to the exit lounge](#).)

If someone really does score a 9 or 10, ask yourself how you managed that and whether you can replicate it for other clients.

And, if you're not sure about what to score someone, why not give them a call to check in and see how they're going? It's the perfect excuse to get in touch.

2. ANALYSE YOUR REFERRAL SOURCES

Now that you have your list of clients, the next thing I want you to do is to figure out how you ended up working for them. In other words, what were your referral sources? If it was through an internal source - ie one of your colleagues - give them a call to thank them and let them know how it went. It would also be useful to find out how they were first introduced to the client contact.

If it was through a formal network, now's a good time to work out the lag time between meeting them and the work coming to you. This is important data for informing what your pipeline looks like.

And, if it came through some other source of activity - such as a talk you gave or an article you wrote, now's the time to do the same thing again.



3. READ SOMETHING DIFFERENT

Professionals - whether lawyers, accountants, engineers or others - need to read for a living. That's not necessarily a great thing for business development. I say this because one of the most important things in BD is the ability to innovate. Too much time spent analysing the minutiae of the Corporations Law or the Tax Act can make you think a particular way and rob you of the fresh ideas that come from seeing the world differently.

So put down the legislation or text books for a while and read something you wouldn't normally. It could be something about [human behaviour](#), or [creativity and innovation](#) or even on [what it takes to run a successful business](#). Or it could be a book about [someone who has achieved big things](#). Whatever it is, just make sure it takes you away from your day-to-day work and gives you a fresh perspective on what it takes to succeed.

4. POLISH UP YOUR ONLINE PRESENCE

It's one of the easiest things we can do BD-wise, and yet it's also one of the most neglected. These days people will often search for someone online before they do business with them. But too often professionals miss a trick by not even bothering doing the basics.

So, go on, plug your name into Google and see what comes up. Is it your bio? If so, is it up to date or is it still talking about stuff you worked on in 2010? What does your LinkedIn profile look like? Is it time to update that too? And have you done anything at all on Twitter since you made that embarrassing tweet about politics in 2013? I thought not. (And what would potential clients think if they saw it?)

5. COME UP WITH TWO BIG IDEAS

I honestly believe the winners in professional services over the next 10 years will be those that innovate best. And innovation always starts with an idea. Sometimes that's a small idea that gets big. Sometimes it's a big idea that we refine and apply to our circumstances.

Too often we kill our ideas because we think they're too outlandish or tricky or crazy to be done. Otherwise, we don't even bother trying to come up with them in the first place. So ask everyone in your team to come up with two ideas for how they could deliver your service differently. It could be anything - nothing is off limits. Ask them to write them down. Then, when things are quieter at the start of next year, meet and discuss them to see what gold people have come up with and whether you could refine them into something that works for you.

(PS: You may find Prof Adam Grant's [TED Talk](#) a very useful kick start for such a meeting).

6. WRITE YOUR CHRISTMAS CARDS

I've [said it before](#) and I'll keep saying it and saying it until I'm hoarse. In my view, few things are as nice as receiving a personal, handwritten Christmas card at the end of the year. Especially this year.

Send one to every client, referrer and valued colleague. Or, if that's not your thing, then why not send a small present or show your appreciation to those who've helped you in some other way. (Although a Christmas card will be cheaper, just saying.)



7. TAKE SOMEONE FROM THE OFFICE OUT TO LUNCH

Appreciated staff are motivated, productive and happy. They'll trust you more and will be more likely to stay with you for the long-term and help your business grow. Unappreciated staff will be the first to go the moment something better comes up, no matter how much money you throw at them.

So take the members from your team - the ones who've helped build your practice this year - out for lunch at your own expense. It'll be a welcome relief after all those online meetings and it's the least you can do to show your appreciation for the hard work they've been putting in over the year. When you're out with them say thank you to them. Seriously, you'll be surprised how far it goes and how little they probably hear it.

Don't leave it to your work-sponsored Christmas party or formal team lunch to do this. It won't have the same impact.

8. DRAW UP NEXT YEAR'S PROFESSIONAL DEVELOPMENT CALENDAR

Too often professionals leave their mandatory education to the last minute. Then, when they eventually get around to doing it they just end up sitting there on their computer, leaving the webinar they've signed up to running in the background while they keep working. (Come on, we know you do.) But if you're not actively planning out your professional development - and including some good face-to-face BD seminars or workshops in the 2021 mix, you're missing another trick.

So jump online and start searching now. Book yourself into something that will really help you build your network as well as your expertise and enjoy the difference it makes when you're engaged with what you do.

9. START BLOGGING

If you really want to be an expert in an area, and therefore the 'go to' person in your field, you need to have an opinion. And the only way to do that, if you share your knowledge with others. Thanks to the internet, it has never been easier to do just that through blogging (or podcasts or video updates).

So, go on, write that article you've been saying you'd write and get it up on your firm's website. Publish something to LinkedIn, and send out a newsletter to your database. Then get into the habit of doing it consistently. You could well amaze yourself with the results that build over time.

10. REVIEW A PROCESS

In the middle of the year we're often working so hard that we don't have time to stop and think about the way we're working. And with so many new processes thrown quickly into the mix this year it's time to take a breather and think about the things you'll stop, start or continue next year.

Maybe it's about the way people are reviewing documents and leaving comments. Maybe it's a protocol for on-boarding a new client. Whatever it is, even a small tweak now could have profound consequences that multiply through everything you do. That's the thinking behind design thinking.



11. BUILD A PROFILE OF YOUR YEAR

You started off by looking at your client list and who was happy. Now I want you to go back and look at what you billed them and when. Match this up to your accounts so that you can see the patterns in your cashflow: when the money came in from them compared to when you did the work. If you can, you should even compare this to previous years.

I find for a lot of professional services firms, 60 percent of the financial year's billings will have been recorded by the time Melbourne Cup rolls around. That means you should already have a reasonable idea for how the financial year will shape up, as well as the calendar year.

12. ENJOY YOURSELF

Finally, don't just sit behind your computer. The lead up to the holiday season is a great time of year to be a professional. Get out there and actually turn up at the social functions that come your way (in whatever COVID-safe way is possible). Do your best to meet new people at each of them. The best BD often happens informally, when there's no pressure and no one is trying to sell.

And that's what this time of year is all about.

WANT MORE?

If you'd like some more ideas or advice on what your firm should be doing in the lead up to Christmas, [get in touch](#).

***The Melbourne Cup is Australia's most prestigious thoroughbred horse race. It is run the first Tuesday of November every year and, because nearly every business in the country takes a little break on the day, it is known as 'the race that stops the nation'.**

Sue-Ella is the Principal of [Prodonovich Advisory](#), a business dedicated to helping professional services firms sharpen their business development practices, and attract and retain good clients.

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