



2017 RECONNECTION RESOLUTION CHECK LIST

Follow this checklist to jump start your 'Reconnection Resolution' and stay on track throughout the year!

☐ 1. ANALYZE YOUR CLIENT LIST

a. Ask yourself questions like:

- ☐ i. How old are they?
- ☐ ii. Are they married? Divorced?
- ☐ iii. Do they have children?
- ☐ iv. What milestones are they reaching?
 - ☐ 1. Buying a home?
 - ☐ 2. Children in College?
 - ☐ 3. Retirement?

☐ 2. WEB PRESENCE

- ☐ a. Refocus brand
- ☐ b. Update Marketing Materials
- ☐ c. Mobile Optimization

☐ 3. MARKETING

- ☐ a. How does your audience prefer to hear from you?
- ☐ b. Establish this preference for each client
- ☐ c. Create several marketing plan according to your client's needs

☐ 4. START A NEW ROUTINE

- ☐ a. Break your goal into tasks
- ☐ b. Add tasks to your schedule to create a timeline

☐ 5. GAMEIFY

- ☐ a. Create a point system
- ☐ b. Track points on an excel sheet
- ☐ c. Reward yourself when you meet goals

☐ 6. INNOVATE & INVITE

- ☐ a. Remember to keep an open mind to find new ideas
- ☐ b. Collaborate with clients – engage them in the process
- ☐ c. Invite clients to bring their own ideas
- ☐ d. Invite clients to bring the children, parents, or friends.