Chasing Positivity

Turn Reflections into New Year's Actions

By: David Richman | December 19, 2023

Year-end is a time of reflection, and while reflecting can be a beneficial exercise, some clients and prospective clients may see it as an unwelcome overture while they are racing toward the holidays and a new year.

Let's suppose you have a prospect who agreed earlier in the year to consider making some changes prior to year-end. And here we are. Year end is upon us, and that concentrated position is still concentrated or that do-it-yourself investor is still a do-it-yourselfer. How can you use the dwindling days of 2023 to motivate them to take the next steps?

Your ability to inspire action requires an understanding of *moments of reflection*, the ongoing thoughts they have about how it would feel to work with you. These moments of reflection often occur in conversations regarding a decision. How can you quiet their inner voices to increase the chances of inspiring action? Consider incorporating the following phrases into your conversations:

"Let's consider for a moment."
This phrase reinforces collaboration by saying that you should both think about the issue together. It also opens the door to explore different possibilities and depressurizes the situation with the words "for a moment."

"One small step."
Long-term goals can appear less daunting and more achievable if broken up into smaller steps.

"I'm wondering what the best way to proceed is."
This phrase allows you to share different possibilities, especially if they have expressed reluctance about moving forward.

"What is it you are most concerned about?"
Focusing on one issue feels more manageable for those who may be facing multiple.

These phrases help shift mindsets from one of reflection to one of action. They help prospective clients tune into the conversation and start thinking about actionable answers to your questions instead of contemplating reflections.

Bottom Line: Help quiet their inner voices by using words and phrases that inspire action in year-end conversations.

"Your ability to inspire action requires an understanding of moments of reflection, the ongoing thoughts they have about how it would feel, or does feel, to work with you."

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