



# MONDAY MOTIVATOR

CREATED BY PERFORMANCE STRATEGIES  
MANAGEMENT CONSULTING GROUP

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## 4<sup>th</sup> Quarter Strategy



By the time you are reading this we are getting ready for the 4<sup>th</sup> quarter of 2016. For many companies this 90 day time frame makes or breaks the operating budget, the quarterly balance sheet and certainly the cash flow report. What is it about the 4<sup>th</sup> quarter that is so important? Why must we consider a special strategy to address the realities of this time frame?

Here to tell us is our guest editorial contributor. First let me introduce you to Jay McDowell. Jay has become a good friend and reliable mentor to me personally. He is also an associate of Performance Strategies, Inc. and an expert in corporate operations while my focus is on the other side of the ledger where marketing and sales resides.

Jay brings a wealth of experience to our publication and this special edition is dedicated entirely to his view of what it takes to prepare your teams for a winning 4<sup>th</sup> quarter strategy. If you're a football fan you'll love the analogy. If not you'll love the strategy. In any case, you'll love the wisdom from a leader who has been there, done that. Now let's read Jay's thoughts ...

**Don't just walk across the finish line... *STORM* the finish line! Your clients and your team deserve a strong finish that is the summation of your leadership skills coupled with your team effort.**

This time of year the kids are heading back to school, we still have summer weather and baseball is in a race for the pennant. The football season kicks off with a month of pre-season games and the holidays are just beyond that. Family, friends, neighbors, celebrations with wonderful food, drink and good times occupy the 4<sup>th</sup> quarter. With that in mind, don't make the mistake of

strolling into the 4<sup>th</sup> quarter and coasting to the finish line. Instead, step up, review your business, get your team together and help get them energized and motivated to finish the year strong.

To help you accomplish this here are five ways to make it happen:

1. **Stay the course.** Stay focused on the 4<sup>th</sup> quarter; don't let your team slide to the end of the year. If you have the year "in the bag," set "stretch" goals and find a suitable reward for exceeding the full year goal. Perhaps something around the holidays; a bonus or extra time off for your team. You might even set up a surprise super holiday celebration. If you appear to be coming up short, refocus your team.



Adjust the targets a bit and make it tough but achievable and make it something they can achieve and feel great about. You can celebrate, just not as big as if your new goals are hit. No one likes to end the year with a "glad that year is behind us" feeling.

2. **Put a bow on it!** (The 4<sup>th</sup> quarter that is.) Look at all your projects and make sure you drive them home. Don't let them just roll over to the next year. Whether these are capital



projects, database cleanups, accounts receivable or other targets, assign accountability for a year-end push and meet your team members regularly to review progress. Celebrate the successes with your team. Also don't forget the human resource files, performance reviews, employee annual trainings and succession planning. Get all your loose ends taken care of and by the time the holidays are here the only thing you'll be putting a bow on will be presents under the tree.

3. **Let the big dog eat!** Is your sales team driving your bus or are they just along for the ride? This is a good time to review your KPIs... Key Productivity Indicators. Look for sales year to date as well as other metrics that show overall performance. Where can improvements be made? Are you tracking and holding your sales teams accountable for sales, margins, new business, expansion business, retained business? Do they know where they stand on a weekly, monthly quarterly and YTD basis? Where do you stand on any proposals that are out and yet to confirm the business award? Who is following up?

Are your marketing efforts tied to your sales team performance measurements? Are all leads fed directly to sales and verified via a SFA / CRM program so such activities can be tracked and verified? Leads are expensive and in the world of small business 73% of all leads are never followed up on. Where do you fall in that metric? Do you know for sure or just believe your answers so far? One VP of Sales we know for a large cable and Data Company serving 25M customers says this ... “I need rock stars, not stage hands!” We could not agree more!

4. **Where do you stand with marketing?** Perhaps this is a good time to review a year-to-date report on the effectiveness and status of your Marketing Budget. Every dollar you spend is very valuable and is an investment, not an expense. You should know the result of your marketing budget before you spend it; not spend it and see what works. Trial and error is not how marketing is supposed to be executed. If you don't know the results you're going to get don't spend the dollars. Test and measure each strategy prior to giving the green light for the full expenditure. Also list all the ways you are spending your valuable marketing dollars. Business cards, newsletters, flyers, post cards, website, social media, networking conferences, trade show giveaways and trinkets all cost real money in the aggregate and should have a unified purpose; a synchronized end game that justifies the expenses. Then determine the number of leads, appointments and clients each of your strategies caused over the year. What is your cost per lead? What are your costs per appointment and your cost per client for each marketing strategy?



5. **Finish strong – running across the finish line**, not doing a sashay, mosey, scoot, skip, hop, stroll, dance or slide! Arrange for the trumpets to be blaring, banjoes strumming and bells ringing! There are 12 months made up of 52 weeks in the year. Don't let your team or you as their leader, languish over the finish. Finishing strong is a trait every organization should strive for. It puts the stamp of a strong work ethic and invites every employee to earn their keep every week, for all 52 weeks, not just 46 or 48 weeks depending on when the holidays hit. Let your competition be the ones that work half days

and call for more casual days as the year winds down. The only wind down occurs on Dec. 31<sup>st</sup> of each year, not on September 30th. A soft attitude with your expectations will create a soft 4<sup>th</sup> quarter result. Finally, perhaps one of the worst effects of a soft 4<sup>th</sup> quarter is as soft start to the New Year. Let's not allow that to happen!



**Jay, speaking for our readers ...** I thank you for your contribution to our business publication and look forward to many years of professional contributions to our readers in the future.

And speaking of our readers... we love feedback. Perhaps you can take a moment to drop us a line at [prospeaker@cox.net](mailto:prospeaker@cox.net) and let us know what you like or do not like about The Monday Motivator. Also many of the ideas for content come from our readers so if you have an idea for a topic you'd like to see covered let us know.

Until next week, if you know of any business that would benefit with a little coaching in the areas of organization, time and task management, social media, sales, marketing, customer service, operations, HR, leadership or team-building, have them give us a call at 562-577-7000 or send us an email. We will keep you in the loop on how it's going.

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**Will Robertson, Founder / CEO**



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Our consulting and coaching focus supports management, sales, customer service and operations. Included are sales and management assessment surveys as well as leadership, teambuilding, sales operations efficiency and online tracking projects. Our other team members bring additional disciplines as well. We will showcase them in future editions of this business journal. We are all committed to driving the results you want.