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**Jodi Chavez** • Dec. 02, 2019

In January, you entered the ring for your clients to go toe-to-toe with their biggest financial challenges — and quarter after quarter, you flew like a butterfly and stung like a bee. But now, with the bout reaching the final rounds, you need to make sure you have enough left in the tank to deal the knockout blow. Ending the year on a high note will help you start the new one with better momentum and set the tone for what comes next. Follow these steps to master year-end closing — there's no training montage required, just practical tactics you can use to finish the year in fighting shape.

## **Keep your eyes open**

You've done well to stay alert all year long for your clients, so don't let your guard down now just because the year is ending. In fact, it's a great time to increase your activity while competitors may be taking their foot off the gas. This time of year brings along plenty of opportunities to win new business and deepen your existing client relationships. For example, you could provide help with:

- Month-end bank reconciliations and general ledger
- Form 10-Q preparation
- Year-end financial analysis
- Compliance audit preparation

And that's just to name a few. The point is to amp up the intensity on the services you provide and stay abreast of all the unique client opportunities that this time of year can provide your firm. Like any good boxer, the more you know about your sparring

partner, or in this case — your client, the more you'll be able to anticipate their

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know tend to get swamped with work and procrastinate, can sooner than you otherwise would to get the ball rolling. Look at each of their businesses and try to identify the kinds of services you think they could benefit from and internalize the patterns of their quarterly schedules. When you sync your movements to theirs, you'll be able to get out ahead of any financial jabs, hooks or crosses coming their way.

## **Strategize for the win**

With your clients' financial roadmaps sorted out, it's time to put your knowledge to the test and use what you've learned to address their year-end challenges. For projects that were already planned or underway, complete them effectively and efficiently to end the year on a high note and leave clients with a positive impression going into the new year. Then revisit the list we covered in the first section and reach out to your clients regarding any of the seasonal services you feel may apply to their situations.

Anticipating needs and being proactive could help you secure additional business, all while showing you're willing to go the extra mile to ensure your clients are being taken care of. Think of this as your footwork. It's less about the punch and more about the intricate, preparatory movements that put you in a position to land one in the first place.

## **Takeaways for the KO**

By making these few small adjustments to your Q4 strategy you'll be able to end the year victorious for both yourself and your clients. Stay on top of any seasonal services you could be providing, get in sync with your clients' needs and use that knowledge to strategize a service plan that's right for them. With these guidelines in mind, the year-end KO you've been working towards can be yours.

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