

# COLLABORATIVE Practice Tips

A monthly bulletin from the CP Cal Practice Excellence Committee

The Practice Excellence Committee is pleased to offer tips to help you increase your Collaborative cases and achieve *practice excellence*.



Please send us your comments and questions! Email us at [info@cpcal.com](mailto:info@cpcal.com)

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## What is Your Vision for 2020? How to Bring it into Focus

**Declare Your Vision for 2020.** In December we asked you to take some time to reflect on the past year. What were your guiding principles, what or who inspired you, what were you grateful for. Now we want you to think about the year to come. What is your intention? What kind of work/personal life balance do you want?

**Write it Down.** The first step may be to set aside time to think about these things. Declare your intention for the year and then make a plan on how you will achieve it. Write it out, post it somewhere it will motivate and inspire you; somewhere you will see it daily.

**Organize your time.** Set aside time to plan the year you want to have, including time to address your intentions and follow through on your vision. You may set aside time for emails, but do you set aside time for reviewing your business plan and working on your business? Calendar everything. If a work/play balance is important, schedule your time off too!

**Break it Down.** If you are having a hard time achieving certain goals, break them down into smaller tasks, calendar time for each task.

**Know yourself.** What time of day is your best time? Should you schedule that time for mediations, returning client calls, or tackling that MSA you really hate to write? Set three tasks per day to get done. Have a list of three more minor tasks to be done should you have extra time. Consider tackling the hardest, or most dreaded task first. You will feel

more successful and have the energy to be ready to move on to the next item on your list.

**Eliminate distractions.** During the time for your task, turn off your phone, the TV, have your staff hold your calls. Whatever tends to take you off task, eliminate the temptations.

**Stay focused.** Keep your "Vision" or "Intention" in mind. (Remember, you've posted it where you can see it daily!) Know that each completed task moves you closer to that goal.

**Use the Buddy System.** Have a "buddy" that you share your Intention and Goals with. Consider scheduling a weekly or monthly call with your buddy to help keep each other on track and share frustrations or solutions. It's important to have a support system at work, as well as at home.



**From the PEC:**

### **Marketing Collaboratively with Your Team**

People who search for services online (and that's getting to be more and more people!) respect peer reviews more than anything else. This is awkward for collaborative professionals because we really don't want to ask our clients to leave reviews...and in the case of the MHP's at least, we're actually forbidden to do so by the standards of our profession. The next best thing, which is entirely ethical, is to collect reviews by OUR peers, the other professionals who know and appreciate our work. You can be a hero, deepen your relationships with your colleagues, and get more cases, by just spending a half hour, today, searching for your friends in your practice group on whatever social media platform you actually use. For many of us, this is LinkedIn. Find your colleague, follow them, share their content, leave a review which highlights your work with them, and comment on their posts. This is easy, fun, very positive...and relationship-building both with your colleagues and with your future referral sources. Who knows? Your colleague may reciprocate...a win/win!



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