

FocalPoint CASE STUDY

Tracy Spaeth — *Financial Services Advisor*

Profile:

For 15 years Ms. Spaeth has owned a financial services business that specialized in helping those over age fifty who had least \$100,000 to invest, increase their income and decrease their taxes. In 2003, her business saw revenues of \$565K.

The Challenge:

Prior to starting the FocalPoint program Ms. Spaeth had trouble setting priorities. She procrastinated, putting off important tasks because they seemed too daunting. She also struggled with hiring the right people to work in her organization. She lacked the confidence needed to be an effective leader and to make her employees feel as if they were part of a team.

The Solution:

After completing FocalPoint Module 1: *Gain Power Through Clarity*, Ms. Spaeth reset her priorities: God first, family second, and career third. Yet when it comes to career, she now grabs the bull by the horns. She relishes the challenge of taking on important tasks and tackling situations that will make the biggest difference in her business; concentrating her sales efforts only on the products that will reward her the most for meeting her clients' needs.

Upon completing Module 4: *Become a Leader*, Ms. Spaeth developed her leadership and hiring skills. She confidently hires the staff she needs and infuses them with her enthusiasm, bringing them with her on her journey to greater success.

The Results:

Ms. Spaeth's firm now employs four people to support a client roster that has grown to 225 households. In 2004, her projected revenues are over \$825K, a 46% increase. In addition, she found time to take more than four weeks of vacation during 2004.

