WELCOME

AUGUST COACHING CALL

UPCOMING COACHING

09.13 Coaching Call (Referrals + Coaching)
10.11 Coaching Call (Relationship to Money + Coaching)

GROWTH RETREAT

09.22 Build-a-Brand Bootcamp
09.23-24 Limitless Growth Retreat
Want to connect? Visit the Growth Retreat room on Tribe!

FOR TODAY'S QUESTIONS
slido.com, #GoodVibes

LIMITLESS

LIMITLESS COACHING CALL

AUGUST 23, 2021

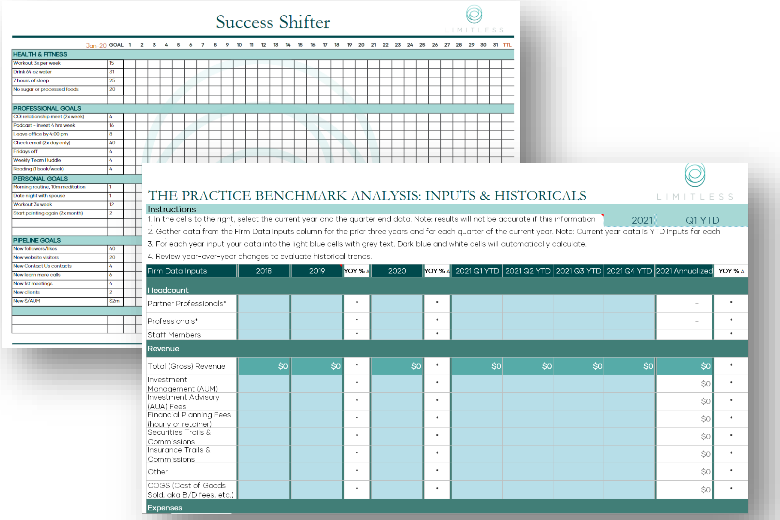
Managing People, Priorities & Projects


TODAY'S
COACH
STEPHANIE BOGAN
TODD CAVANAUGH

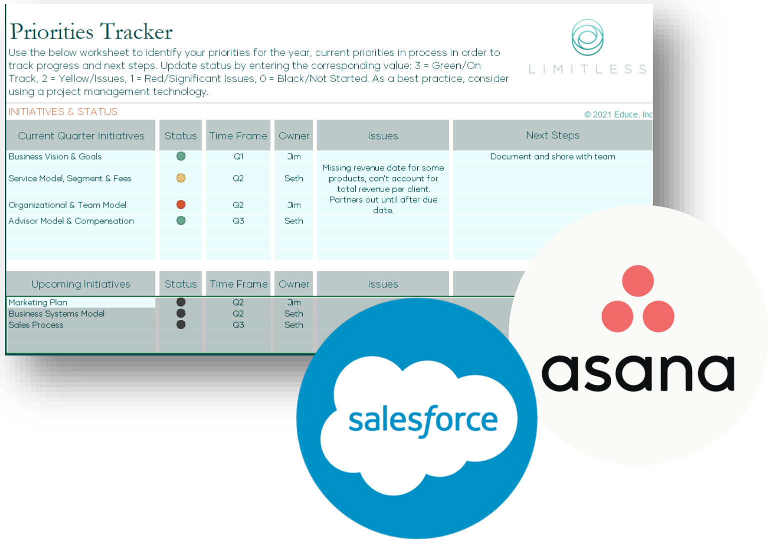
Clarity + Transparency + Accountability
= RESULTS

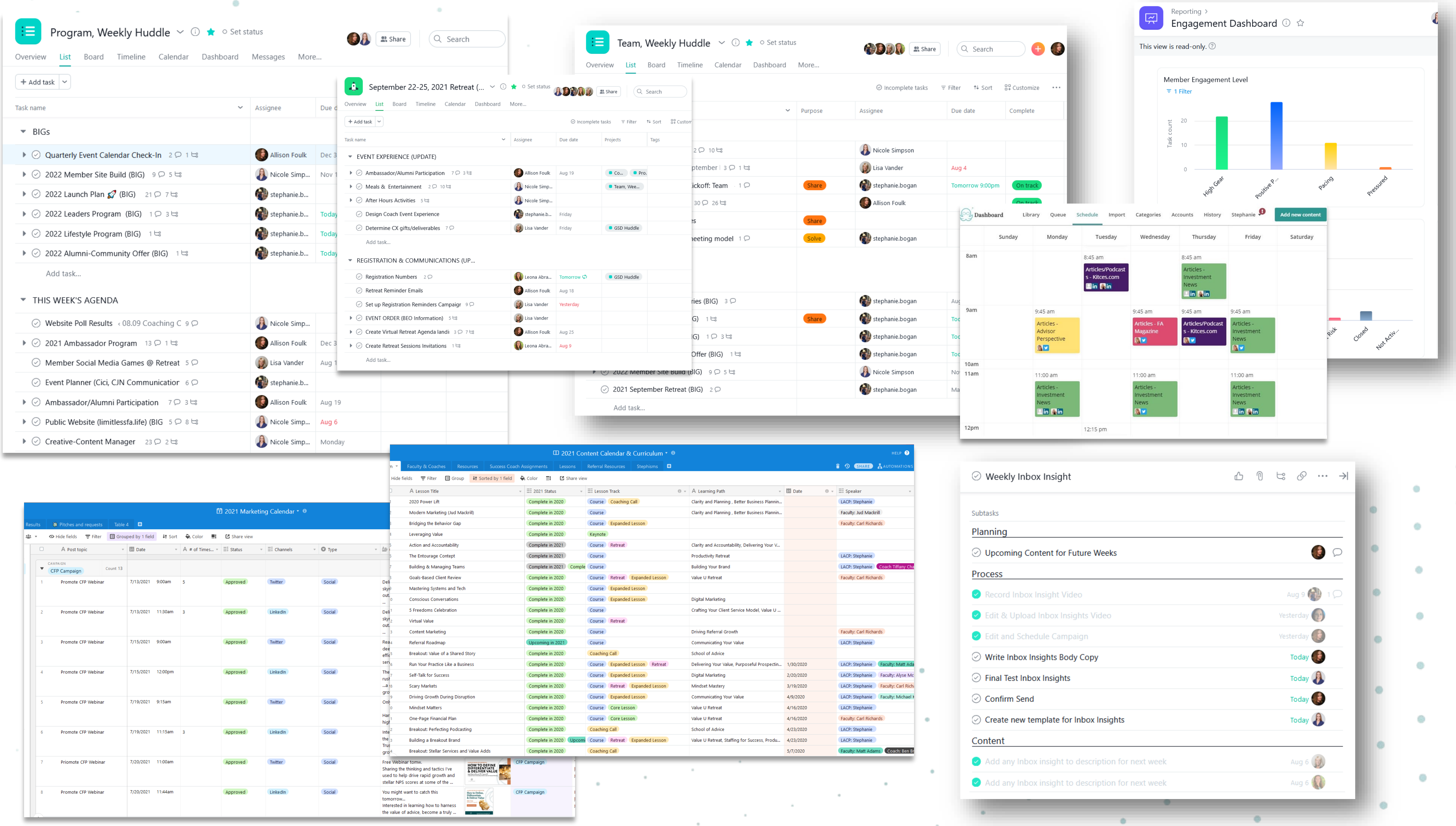
PEOPLE
LIMITLESS LESSONS
- Rock Star Right Hand
- Building & Managing Teams

PRIORITIES
LIMITLESS LESSONS
- Your Vision for Success
- My Model Practice
- Take Control of Your Time



PROJECTS
LIMITLESS LESSONS
- Action & Accountability





Program, Weekly Huddle
Set status
Share
Search
Overview
List
Board
Timeline
Calendar
Dashboard
Messages
More...
Add task
Task name
Assignee
BIGs
Quarterly Event Calendar Check-In
2022 Member Site Build (BIG)
2022 Launch Plan (BIG)
2022 Leaders Program (BIG)
2022 Lifestyle Program (BIG)
2022 Alumni-Community Offer (BIG)
Add task...
THIS WEEK'S AGENDA
Website Poll Results
2021 Ambassador Program
Member Social Media Games @ Retreat
Event Planner (Cici, CJN Communication
Ambassador/Alumni Participation
Public Website (limitlessfa.life) (BIG
Creative-Content Manager
Allison Foulk
Nicole Simp...
stephanie.b...
Lisa Vander
Today
Aug 19
Aug 6
Monday
September 22-25, 2021 Retreat (...
EVENT EXPERIENCE (UPDATE)
Ambassador/Alumni Participation
Meals & Entertainment
After Hours Activities
Design Coach Event Experience
Determine CX gifts/deliverables
REGISTRATION & COMMUNICATIONS (UP...
Registration Numbers
Retreat Reminder Emails
Set up Registration Reminders Campaign
EVENT ORDER (BEO Information)
Create Virtual Retreat Agenda landi
Create Retreat Sessions Invitations
Team, Weekly Huddle
Incomplete tasks
Filter
Sort
Customize
Purpose
Assignee
Due date
Complete
Nicole Simpson
Lisa Vander
stephanie.bogan
Allison Foulk
Share
Solve
On track
Tomorrow 9:00pm
2022 Member Site Build (BIG)
2021 September Retreat (BIG)
Add task...
Reporting
Engagement Dashboard
This view is read-only.
Member Engagement Level
1 Filter
Task count
High Gear
Positive P...
Pacing
Pressured
Dashboard
Library
Queue
Schedule
Import
Categories
Accounts
History
Add new content
Sunday
Monday
Tuesday
Wednesday
Thursday
Friday
Saturday
8am
9am
10am
11am
12pm
Articles/Podcasts - Kitces.com
Articles - Investment News
Articles - Advisor Perspective
Articles - FA Magazine
2021 Content Calendar & Curriculum
Lesson Title
2021 Status
Lesson Track
Learning Path
Date
Speaker
2021 Marketing Calendar
Post topic
Date
Status
Channels
Type
CFP Campaign
Promote CFP Webinar
Approved
Twitter
LinkedIn
Social
Weekly Inbox Insight
Subtasks
Planning
Upcoming Content for Future Weeks
Process
Record Inbox Insight Video
Edit & Upload Inbox Insights Video
Edit and Schedule Campaign
Write Inbox Insights Body Copy
Final Test Inbox Insights
Confirm Send
Create new template for Inbox Insights
Content
Add any Inbox insight to description for next week

Translate this...

Sample: Training Plan Overview

Instructions: Use this tool to map out a training plan and timeline for new employees. This plan sets up regular check-ins to review proficiency and performance of the team member. It also maps out the timeline and trainer for each training item. This sample can be used as a guide and a blank template is available on the Template tab.

LIMITLESS

Name	Jim Doe
Position	Administrative Assistant
Start Date	2/1/2021

TRAINING CHECK-IN SCHEDULE

Check-ins occur weekly for the first month, then every 30, 60 and 90 days. After that, move to quarterly check-ins. Review date should be set for each of the following check-ins. Summary notes are to be entered, including future follow-up items.

Training Check-Ins	Date	Notes
Week 1	2/1/2021	Introduced to most topics, just learning basics, has general office procedures down.
Week 2	2/8/2021	
Week 3	2/15/2021	
30-day	3/1/2021	
60-day	4/3/2021	
90-day	5/3/2021	
Qtrly Check-In	8/1/2021	
Qtrly Check-In	10/30/2021	
Qtrly Check-In	1/28/2022	

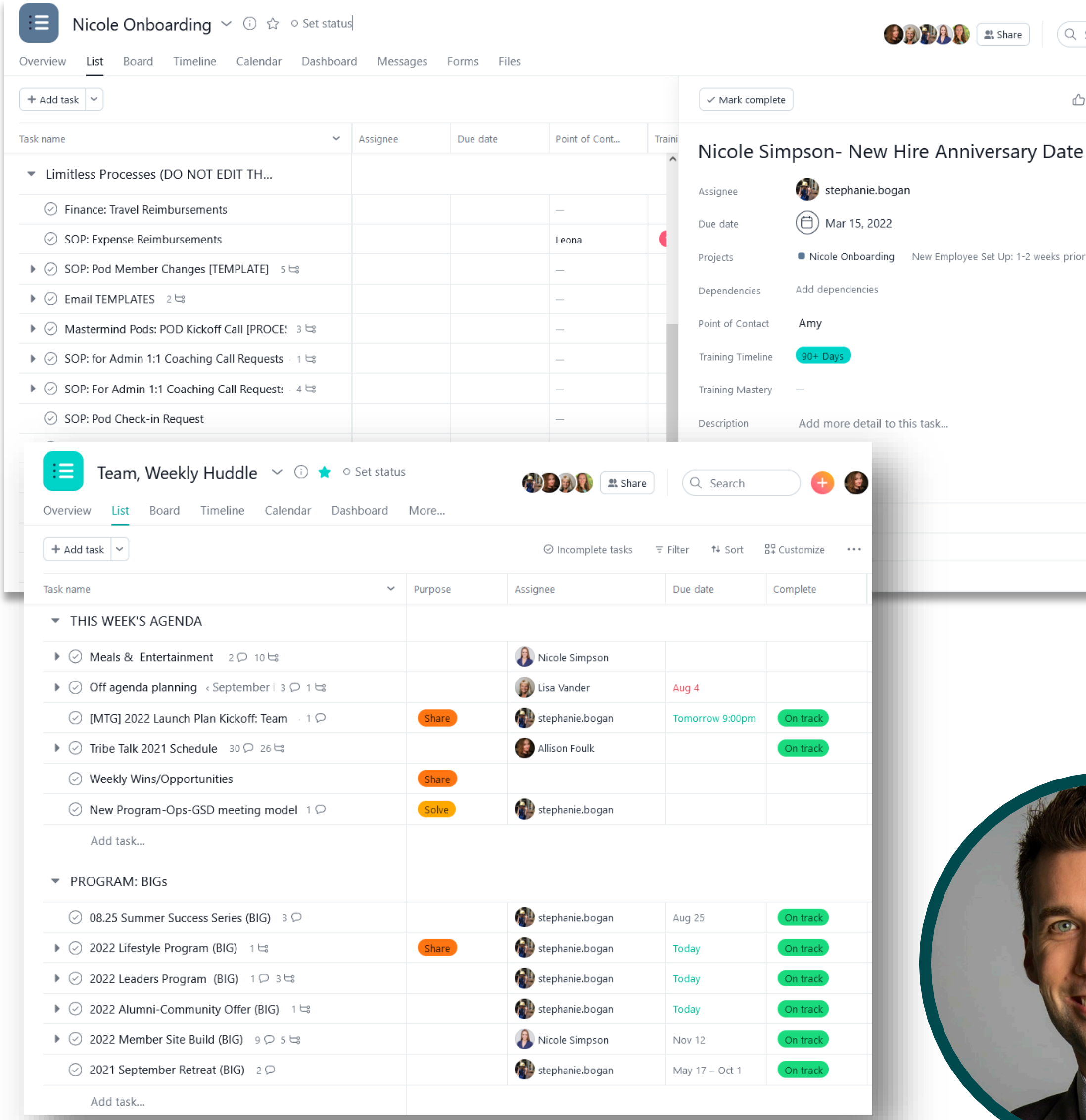
Example Process

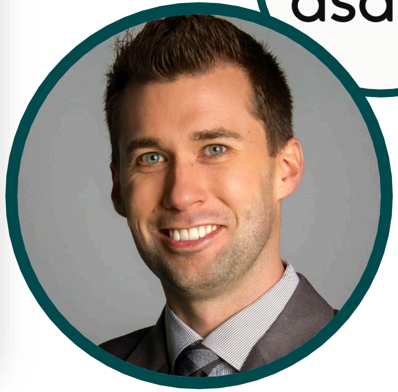
WEEKLY TEAM MEETING PROCESS: SAMPLE

Owner: CSA
Description: Process for preparing for, conducting and following up after weekly team meeting
Meeting date: Every Monday at 10 – 11 a.m.

	ACTION STEP	WHO	BY WHEN
1	Update the Weekly Team Meeting Agenda in preparation for Monday meeting. • Add any weekly win or shout out, these can be your own or for someone else • Update the status to reflect if a priority is Green = On track, Yellow = Issues to discuss, Red = Significant issues deadline in jeopardy • Each team member adds their most critical issue for discussion to Top Issues and remaining issues to Remaining Issues	Team Members	End of day Friday
2	Attend meeting, remembering: • The meeting will start on time even if all team members are not present • Be respectful, curious and work collaboratively to solve issues • Team members are responsible for capturing their own next steps • Meetings end on time, any remaining issue not discussed will be discussed in the next meeting or should be address in our 1:1 meetings	Team Members	Monday in meeting
3	Follow meeting agenda. • Priorities status check (On Track, Issue, Warning) – 5 min • Top Issues (1 per team member) – 30 min • Remaining Issues (everyone else) – 25 min	Team Members	Monday in meeting
4	After meeting ends, all team members input their action items with due dates into Asana by end of day.	Team Members	Monday after meeting

To This...





asana

WITH ASANA


LIMITLESS Q&A