

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](https://www.slido.com), [#GoodVibes](https://twitter.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

Candidate Tracker

Instructions: Use the chart below to track candidates who move through your hiring process. We recommend only tracking candidates who make it past the initial screening process in order to minimize the amount of time spent tracking candidates. Once you have your top 2-4 candidates, use the Top Candidate Evaluation tool to help determine who to hire.

Position: Insert Title / Year (Admin Asst 2021/1/1)

Candidate Name	Status	Step 1: Pre-Screening	Step 2: Phone Interview	Step 3: 3rd Screening / Testing	Step 4: 1st Person Interview	Step 5: Background / References	Step 6: Team Interview	Step 7: Final Interview	Offer / Position Accepted	Notes
Jane Doe	In-Person Interview Scheduled	Done 1/1	Done 1/3	Done 1/15	Scheduled					Identified as right background, but is less experienced. Need to continue process to evaluate further.
John Smith	Completing testing case study, due 2/1									Completed initial screen as "Yes" candidate. Has the right...
Lily Tomis	Pending decision, other candidates completing process									

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.

Name	Jane 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	Focusing on tech training in downtime.
Week 3	2/15/2021	Being proactive solving office problems, continue to work on mastering office.
30-day	3/1/2021	Introduced to most topics, just learning basics, has general office procedures down.
60-day	4/3/2021	Introduced to all topics, showing improvement, but needs additional training on industry specific items and paperwork support.
90-day	5/3/2021	Sell needs additional training, particularly related to account paperwork. Demonstrated competence on all standard administrative functions.
Only Check-in	8/1/2021	Able to complete paperwork with moderate supervision and continues to improve.
Only Check-in	10/30/2021	Fully competent and able to work independently with minimal direction. Still learning as new topics come up.
Only Check-in	1/28/2022	Fully competent and able to work independently with minimal direction, working to identify additional improvements and goals for development.

Success Shifter

HEALTH & FITNESS	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	
Physical fitness score	10																															
Stress level score	20																															
Productivity score	30																															
Work-life balance score	40																															
Overall score	50																															

THE PRACTICE BENCHMARK ANALYSIS: INPUTS & HISTORICALS

Instructions:

- In the cells to the right, select the current year and the quarter and data. Note: results will not be accurate if this information is not entered.
- Gather data from the Firm Data inputs column for the prior three years and for each quarter of the current year. Note: Current year data is YTD inputs for each quarter.
- For each year input your data into the light blue cells with grey text.
- Review year-over-year changes to evaluate historical trends.

Firm Data Inputs	2018	2019	YOY %	2020	YOY %	2021 Q1 YTD	2021 Q2 YTD	2021 Q3 YTD	2021 Q4 YTD	2021 Annualized	YOY %
Headcount											
Partner Professionals*											
Professionals*											
Staff Members											
Revenue											
Total (Gross Revenue)	\$0	\$0	*	\$0	*	\$0	\$0	\$0	\$0	\$0	*
Investment Management (AUM)											\$0
Investment Advisory (AIA) Fees											\$0
Financial Planning Fees (hourly or retainer)											\$0
Securities Trade & Commissions											\$0
Insurance Trade & Commissions											\$0
Other											\$0
COGS (Cost of Goods Sold, aka COI Fees, etc.)											\$0
Expenses											\$0

Priorities Tracker

Use the below worksheet to identify your priorities for the year, current priorities in process in order to track progress and next steps. Update status by entering the corresponding value: 3 = Green/On Track, 2 = Yellow/Issues, 1 = Red/Significant Issues, 0 = Black/Not Started. As a best practice, consider using a project management technology.

Current Quarter Initiatives	Status	Time Frame	Owner	Issues	Next Steps
Business Vision & Goals	3	Q1	Jim		Document and share with team
Service Model, Segment & Fees	2	Q2	Seth	Missing revenue data for some products, can't account for total revenue per client.	Partners out until after due date.
Organizational & Team Model	1	Q2	Jim		
Advisor Model & Compensation	3	Q3	Seth		

Upcoming Initiatives

Upcoming Initiatives	Status	Time Frame	Owner	Issues
Marketing Plan	0	Q2	Jim	
Business Systems Model	0	Q2	Seth	
Sales Process	0	Q3	Seth	



Program, Weekly Huddle

Overview **List** Board Timeline Calendar Dashboard Messages More...

+ Add task

Task name	Assignee	Due date
BIGs		
Quarterly Event Calendar Check-In	Allison Fouk	Dec 3
2022 Member Site Build (BIG)	Nicole Simp...	Nov 1
2022 Launch Plan (BIG)	Stephanie.b...	21 7
2022 Leaders Program (BIG)	Stephanie.b...	Today
2022 Lifestyle Program (BIG)	Stephanie.b...	Today
2022 Alumni-Community Offer (BIG)	Stephanie.b...	Today
Add task...		
THIS WEEK'S AGENDA		
Website Poll Results < 08.09 Coaching	Nicole Simp...	9
2021 Ambassador Program	Allison Fouk	Dec 3
Member Social Media Games @ Retreat	Lisa Vander	Aug 1
Event Planner (Cici, CJN Communicator)	Stephanie.b...	6
Ambassador/Alumni Participation	Allison Fouk	Aug 19
Public Website (limitless4life) (BIG)	Nicole Simp...	Aug 6
Creative-Content Manager	Nicole Simp...	Monday

September 22-25, 2021 Retreat

Overview **List** Board Timeline Calendar Dashboard More...

+ Add task

Task name	Assignee	Due date	Projects	Tags
EVENT EXPERIENCE (UPDATE)				
Ambassador/Alumni Participation	Allison Fouk	Aug 19	Co., Pro.	
Meals & Entertainment	Nicole Simp...		Team, Wee...	
After Hours Activities	Nicole Simp...	Friday		
Design Coach Event Experience	Stephanie.b...	Friday		
Determine CX gifts/deliverables	Lisa Vander	Friday	GSD Huddle	
Add task...				
REGISTRATION & COMMUNICATIONS (UP...				
Registration Numbers	Leona Abra...	Tomorrow	GSD Huddle	
Retreat Reminder Emails	Allison Fouk	Aug 18		
Set up Registration Reminders Campaign	Lisa Vander	Yesterday		
EVENT ORDER (BEO Information)	Lisa Vander			
Create Virtual Retreat Agenda landing	Allison Fouk	Aug 25		
Create Retreat Sessions Invitations	Leona Abra...	Aug 9		
Add task...				

Team, Weekly Huddle

Overview **List** Board Timeline Calendar Dashboard More...

+ Add task

Purpose	Assignee	Due date	Complete
	Nicole Simpson		
	Lisa Vander	Aug 4	
	Stephanie.bogan	Tomorrow 9:00pm	On track
	Allison Fouk		
	Stephanie.bogan		
	Stephanie.bogan		
	Stephanie.bogan		
	Stephanie.bogan		
	Nicole Simpson		
	Stephanie.bogan		

Reporting > Engagement Dashboard

This view is read-only.

Member Engagement Level

1 Filter

Category	Talk Count
High Gear	20
Positive P...	25
Pacing	10
Pressured	2

Dashboard Library Queue **Schedule** Import Categories Accounts History Stephanie Add new content

Day	Time	Item
Tuesday	8:45 am	Articles/Podcasts - Kitces.com
Thursday	8:45 am	Articles - Investment News
Monday	9:45 am	Articles - Advisor Perspective
Wednesday	9:45 am	Articles - FA Magazine
Thursday	9:45 am	Articles/Podcast - Kitces.com
Friday	9:45 am	Articles - Investment News
Monday	11:00 am	Articles - Investment News
Wednesday	11:00 am	Articles - Investment News
Thursday	11:00 am	Articles - Investment News

2021 Marketing Calendar

Post topic	Date	# of Times...	Status	Channels	Type
CAMPAIN		Count 13			
CFP Campaign					
Promote CFP Webinar	7/13/2021 9:00am	5	Approved	Twitter	Social
Promote CFP Webinar	7/13/2021 11:30am	3	Approved	LinkedIn	Social
Promote CFP Webinar	7/15/2021 9:00am		Approved	Twitter	Social
Promote CFP Webinar	7/15/2021 12:00pm		Approved	LinkedIn	Social
Promote CFP Webinar	7/19/2021 9:15am		Approved	Twitter	Social
Promote CFP Webinar	7/19/2021 11:15am	3	Approved	LinkedIn	Social
Promote CFP Webinar	7/20/2021 11:00am		Approved	Twitter	Social
Promote CFP Webinar	7/20/2021 11:44am		Approved	LinkedIn	Social

2021 Content Calendar & Curriculum

Lesson Title	2021 Status	Lesson Track	Learning Path	Date	Speaker
2020 Power Lift	Complete in 2020	Course - Coaching Call	Clarity and Planning - Better Business Plann...		LACP: Stephanie
Modern Marketing (Aud Madrill)	Complete in 2020	Course	Clarity and Planning - Better Business Plann...		Faculty: Jud Madrill
Bridging the Behavior Gap	Complete in 2020	Course - Expanded Lesson			Faculty: Carl Richards
Leveraging Value	Complete in 2020	Course - Keynote			
Action and Accountability	Complete in 2021	Course - Retreat	Clarity and Accountability, Delivering Your V...		
The Encouragement Concept	Complete in 2021	Course	Productivity Retreat		LACP: Stephanie
Building & Managing Teams	Complete in 2021	Complete	Building Your Brand		LACP: Stephanie Coach, Faculty: C...
Goal-based Client Review	Complete in 2020	Course - Retreat - Expanded Lesson	Value U Retreat		Faculty: Carl Richards
Mastering Systems and Tech	Complete in 2020	Course - Expanded Lesson			
Conscious Conversations	Complete in 2020	Course - Expanded Lesson	Digital Marketing		
5 Freedoms Celebration	Complete in 2020	Course	Crafting Your Client Service Model, Value U...		
Virtual Value	Complete in 2020	Course - Retreat			
Content Marketing	Complete in 2020	Course	Driving Referral Growth		Faculty: Carl Richards
Referral Roadmap	Upcoming in 2021	Course	Communicating Your Value		LACP: Stephanie
Breakout: Value of a Shared Story	Complete in 2020	Course - Coaching Call	School of Advice		
Run Your Practice Like a Business	Complete in 2020	Course - Expanded Lesson - Retreat	Delivering Your Value, Purposeful Prospect...	1/30/2020	LACP: Stephanie Faculty: Matt Ad...
Self-Talk for Success	Complete in 2020	Course - Expanded Lesson	Digital Marketing	2/20/2020	LACP: Stephanie Faculty: Alyse Mc...
Scary Markets	Complete in 2020	Course - Retreat - Expanded Lesson	Mindset Mastery	3/19/2020	LACP: Stephanie Faculty: Carl Rich...
Driving Growth During Disruption	Complete in 2020	Course - Expanded Lesson	Communicating Your Value	4/9/2020	LACP: Stephanie Faculty: Michael I...
Mindset Matters	Complete in 2020	Course - Core Lesson	Value U Retreat	4/16/2020	LACP: Stephanie
One-Page Financial Plan	Complete in 2020	Course - Core Lesson	Value U Retreat	4/16/2020	Faculty: Carl Richards
Breakout: Perfecting Podcasting	Complete in 2020	Course - Coaching Call	School of Advice	4/23/2020	LACP: Stephanie
Building a Breakout Brand	Complete in 2020	Upcoming Course - Retreat - Expanded Lesson	Value U Retreat, Staffing for Success, Produ...	4/23/2020	LACP: Stephanie
Breakout: Stellar Services and Value Adds	Complete in 2020	Course - Coaching Call		5/7/2020	Faculty: Matt Adams Coach: Bes I...

Weekly Inbox Insight

Subtasks

Planning

- Upcoming Content for Future Weeks

Process

- Record Inbox Insight Video (Aug 9)
- Edit & Upload Inbox Insights Video (Yesterday)
- Edit and Schedule Campaign (Yesterday)
- Write Inbox Insights Body Copy (Today)
- Final Test Inbox Insights (Today)
- Confirm Send (Today)
- Create new template for Inbox Insights (Today)

Content

- Add any Inbox insight to description for next week (Aug 6)
- Add any Inbox insight to description for next week (Aug 6)

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.

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

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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
<ol style="list-style-type: none"> Update the Weekly Team Meeting Agenda in preparation for Monday meeting. <ul style="list-style-type: none"> 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
<ol style="list-style-type: none"> Attend meeting, remembering: <ul style="list-style-type: none"> 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
<ol style="list-style-type: none"> Follow meeting agenda. <ul style="list-style-type: none"> 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
<ol style="list-style-type: none"> 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...

The image shows two Asana project views. The top view is for 'Nicole Onboarding' in List view, showing a list of tasks with assignees like Leona and training milestones. The bottom view is for 'Team, Weekly Huddle' in List view, showing tasks for agenda items and program milestones with assignees like Lisa Vander, Stephanie Bogan, and Allison Foulk. A task detail panel for Nicole Simpson's anniversary is also visible on the right.



WITH ASANA

