

WELCOME

OCTOBER COACHING CALL



Tribe Insights

BE COOL LIKE CATHY PINARD: CONNECT ON TRIBE!



Q3 Quarterly Business Review Q4 Quarterly Planning



Coaching Calls:

Oct. 25: Digital Marketing Services with EntreTeam
(recording available for Launch)

Nov. 8: Relationship to Money with Stephanie

FOR TODAY'S QUESTIONS

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

on your phone or second screen

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LIMITLESS COACHING CALL

Quarterly Review
October 11, 2021

And the Results Are In...

★ Overall Rating: *9.5 out of 10 stars*



Most Talked About Sessions:

Steph's Keynote, Gearing Up for Growth, Choosing Channel, Websites that Work!



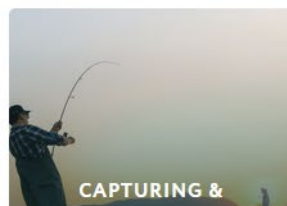
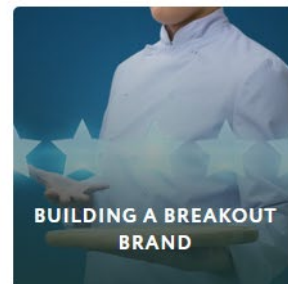
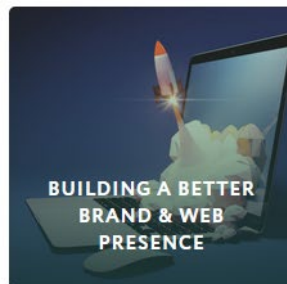
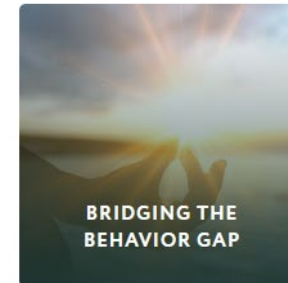
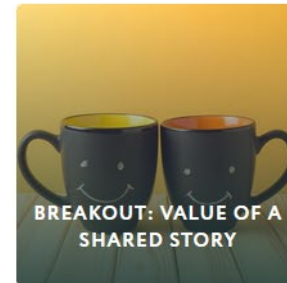
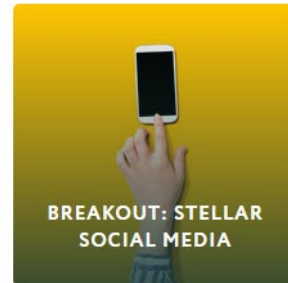
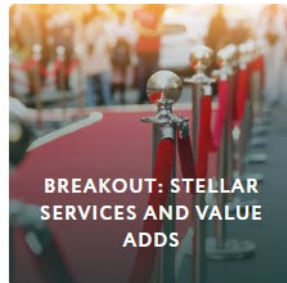
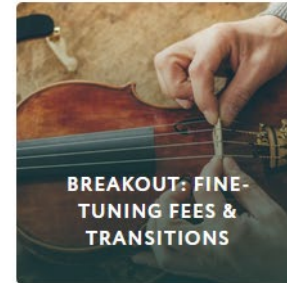
Most Positive Experience: *Keynote speakers and overall event experience*



Best Learning: *Breakouts and Peer Conversations (breaks, lunch, bars...)*

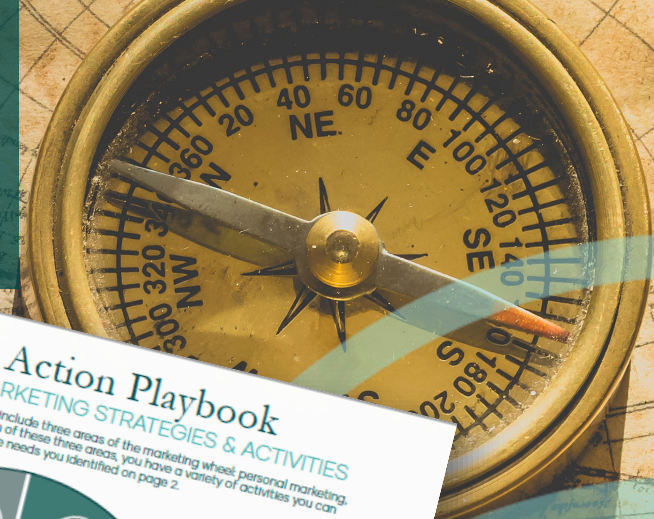
Key Takeaway	Action Item
Venue and Hotel Considerations	<ul style="list-style-type: none">• Give clarity around event experience, logistics and communication• Send instructions clearly, several times and in the email rather than in a PDF• Seating and volume considerations for next retreat• Nicer hotel (when available!)
Workbook	<ul style="list-style-type: none">• Fillable PDF/Online workbook added or in lieu of print• More closely follow the agenda and session slides
Areas to improve	<ul style="list-style-type: none">• Adding more 'workgroup' time into agenda• Share action items at the end of each lesson• Follow up in coaching calls (Bring to Office Hours!)

NEW COURSES PAGE



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YOUR MARKETING M.A.P.



Marketing Action Playbook

STEP 1: BUILD YOUR STRATEGY

Define your overall marketing strategy by establishing goals, defining your audience and setting your budget.

GOALS
What are the goals and objectives of your marketing activities?
Below are some examples you can choose or you can set your own goals.

- Add ___ new client relationships generating at least \$_____ per client
- Establish ___ COI relationships
- Increase quality and quantity of client referrals
- Build a digital audience
- _____
- _____
- _____

How will you measure your success?

AUDIENCE
Who is your target audience?
As you look at the goals of your marketing plan, determine who you need to target in order to achieve each goal.

Where would you or how could you find 100 of them (clubs, associations, organic search, acquisition, networkings, COIs, etc.)?

BUDGET
How much are you willing to invest in marketing over the next 12 months?

Time: _____ Money: _____

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Marketing Action Playbook

STEP 2: SELECT YOUR MARKETING STRATEGIES & ACTIVITIES

Your marketing activities can be summarized to include three areas of the marketing wheel: personal marketing, brand messaging and digital marketing. In each of these three areas, you have a variety of activities you can pursue based on the needs you identified on page 2.

PERSONAL MARKETING
BUILD REFERRAL RELATIONSHIPS WITH COIs

- Client Referrals
- COI Relationships
- Speaking
- Passion Prospecting

WILL THIS STRATEGY BE PART OF YOUR MARKETING PLAN? Yes No

WHAT DO YOU NEED TO CONSIDER?

- Gather names of all current client COIs, by type (CPA, Attorney, etc.)
- Build a COI dream team list
- Draft introduction scripts and practice them
- Create a 12 mo. communications calendar
- Build a COI information process to gather personal and professional information on your COIs
- Connect with your COIs on social media

WHAT PRE-MARKETING ACTIONS DO YOU NEED TO TAKE?

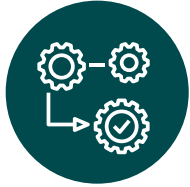
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Building Your Marketing Action Playbook



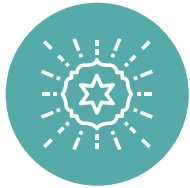
SET YOUR GOALS



Define your goals



Bring on 10 new clients
@ average of \$10,000 in
revenue per client



Build brand awareness
and credibility in community



Increase # of referrals from
COIs and clients to #/AUM year

Marketing Action Playbook

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GOALS

What are the goals and objectives of your marketing activities?
Below are some examples you can choose or you can set your own goals.

	How will you measure your success?
<input type="checkbox"/> Add ___ new client relationships generating at least \$_____ per client	
<input type="checkbox"/> Establish ___ COI relationships	
<input type="checkbox"/> Increase quality and quantity of client referrals	
<input type="checkbox"/> Build a digital audience	
<input type="checkbox"/> _____	
<input type="checkbox"/> _____	
<input type="checkbox"/> _____	

AUDIENCE

Who is your target audience?
As you look at the goals of your marketing plan, determine who you need to target in order to achieve each goal.
You may have more than one target audience.

Who is your target audience?	Where would you or how could you find 100 of them (clubs, associations, organic search, acquisition, networkings, COIs, etc.)?

BUDGET

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Starting from Ground Zero



ESTABLISH YOUR TARGET CLIENT

- Retirees in my area; with major local employer(s)
- Want secure retirement, family focus, time to live



WEBSITE

- Update, retirees ready to follow what sparks joy (family)
- Clear space speaking to employer sub-specialty



CONTENT MARKETING

- Social media campaigns (retirees/employer)
- Monthly Retirement Ready newsletter
- Podcast: retirees (employer plan special editions)



PASSION PROSPECTING

- Flying, Community, Company events



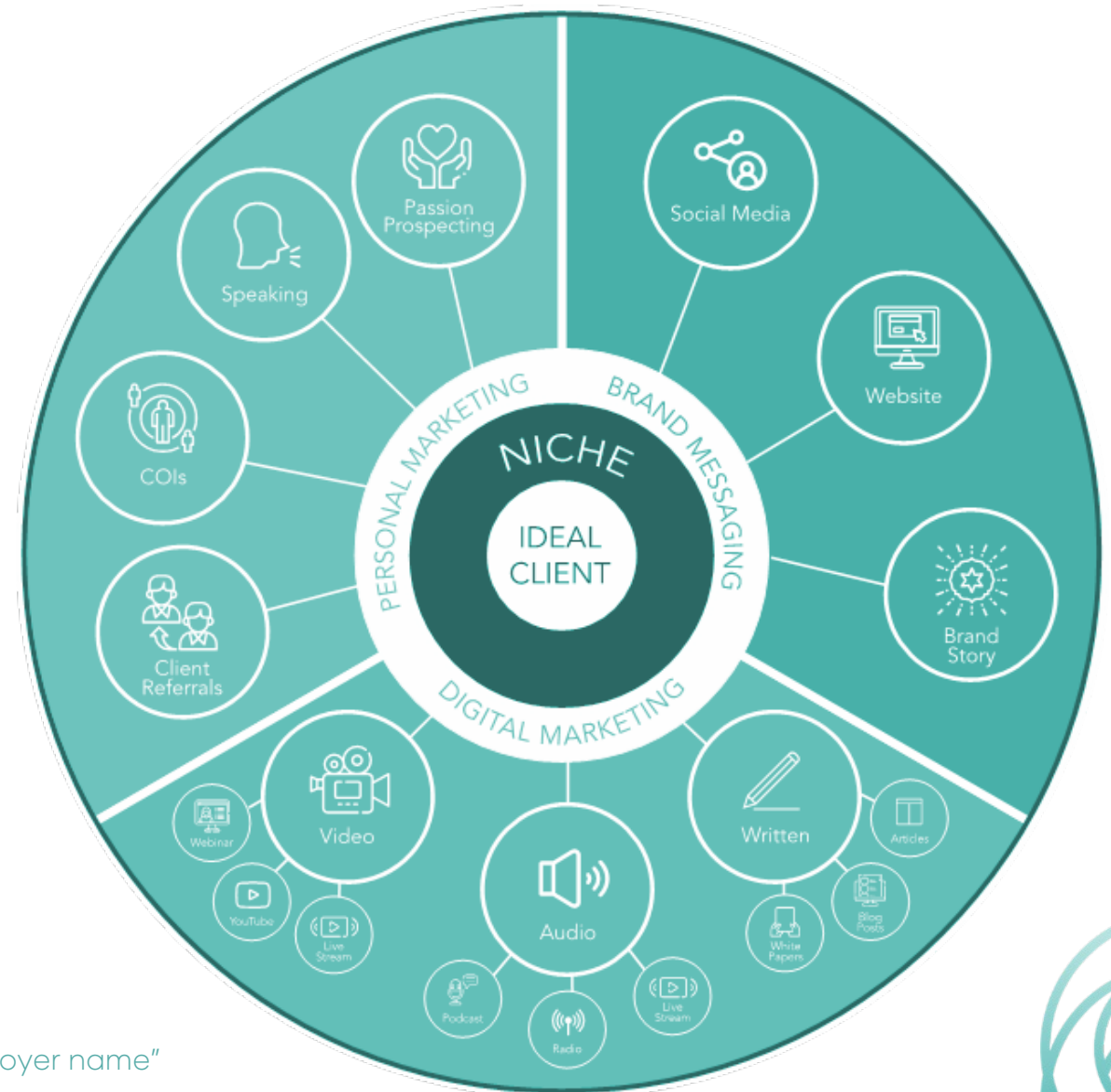
CENTERS OF INFLUENCE

- Local CPAs/Tax preparers
- Local Estate Attorneys
- Major Employer HR managers



WORKSHOPS

- 2x year: 5 retirement mistakes not to make with your "employer name" retirement plan



CREATE

your 1-Page Marketing Plan

One-Page Marketing Plan (SAMPLE)

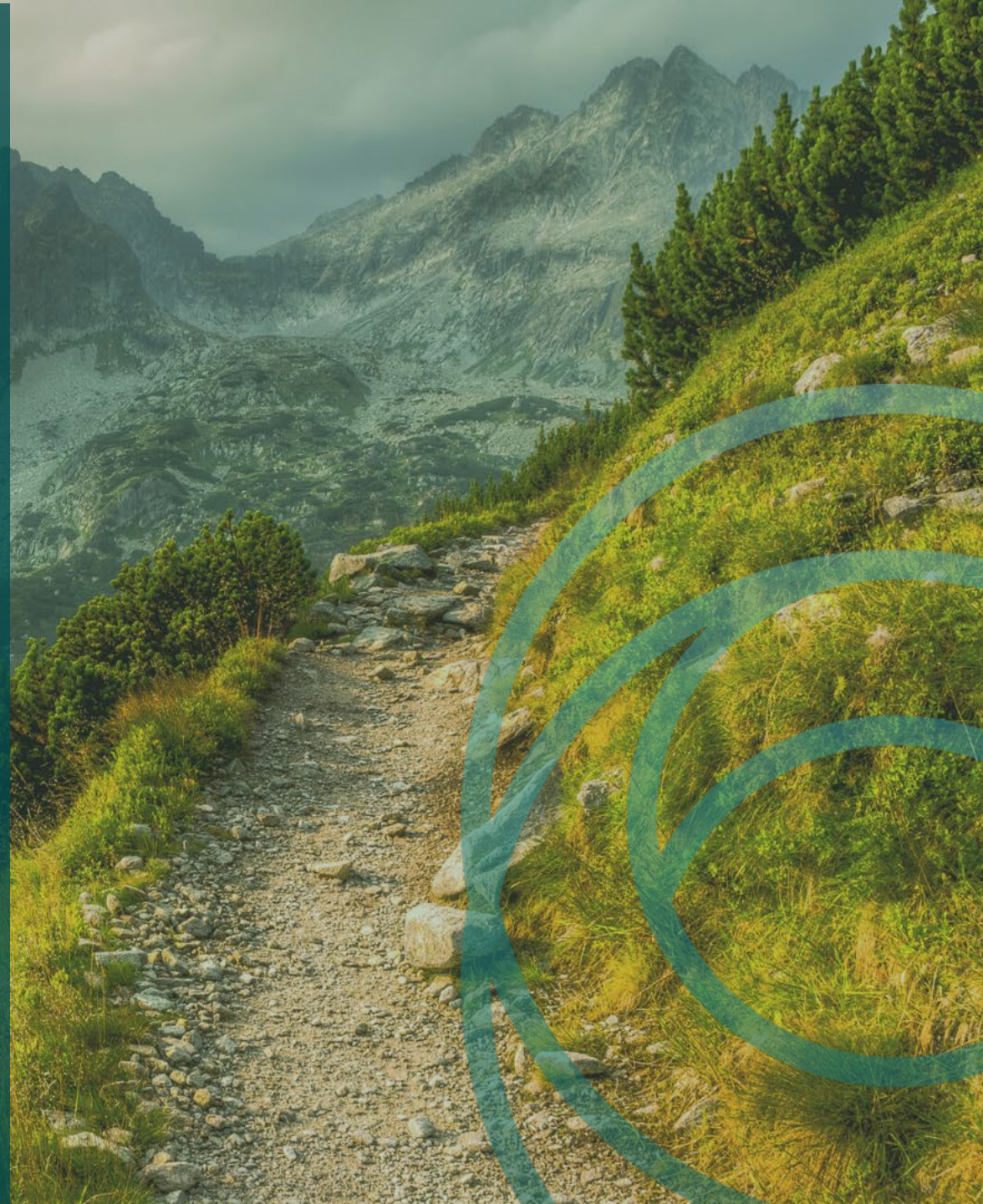
This sample marketing plan provides an example of how to customize the worksheet to your marketing plan. Simply edit columns and titles as needed to

WEEK	PLAN & PREP	CONTENT	COIs	NETWORKING	CLIENTS
1	Annual scheduling	Email Newsletter	COI meet w/(set)	Golf, weekly	
2	Q1 content drafting		Contact 3 new		
3	Q1 content drafting	Article	COI meet w/(set)	Board meeting	
4	Web firm decision		Contact 3 new	Coffee Chat	
5		Podcast	COI meet w/(set)		
6	Web update		Contact 3 new	Coffee Chat	
7	Web update	Email Newsletter	COI meet w/(set)		
8	Web update		Contact 3 new	Coffee Chat	Shredd
9	Web update	Article	COI meet w/(set)		
10	Record Q2 podcasts		Contact 3 new	Coffee Chat	
11		Podcast	COI meet w/(set)		
12	Prep, Tax Time Treats			Coffee Chat	
13	Launch web update	Email Newsletter	Tax Time Treats	Board meeting	
14			Tax Time Treats	Coffee Chat	
15		Article	COI connect		
16	BREAK WEEK				
17		Podcast	COI connect		
18				Coffee Chat	
19		Email Newsletter			
20	Record Q3 podcasts				
21		Article			
22					SPRING

HOW WILL I REACH THE PEOPLE?

LIMITLESS IN-PRACTICE

- Complete your Marketing M.A.P.
- Build your One-Page Marketing Plan
- Create a system to manage (Asana/CRM)
- Schedule annual marketing calendar
- Block time in your personal calendar
- Track activities and results with Success Shifter or Habits Journal (or other log)
- Start growth tracking and/or use the Practice Benchmark tool (quarterly review)
- Commit, calendar and consistently implement your marketing plan
- Remember, the plan will work if you work the plan





LET'S

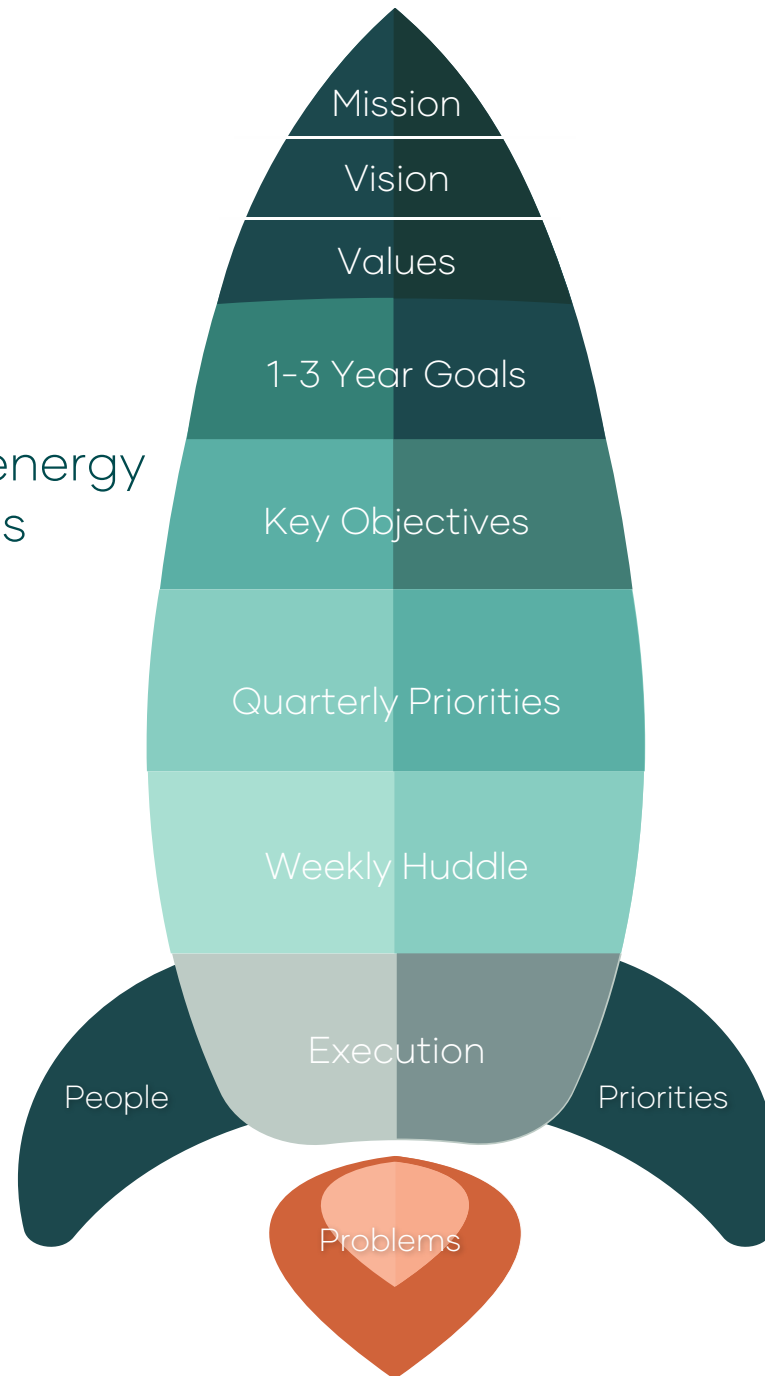
BREAKOUT!

Share your #1 marketing growth focus and your key action steps.

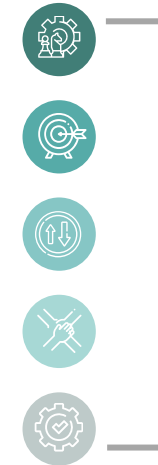
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The Limitless *LAUNCH* *PROCESS*

A simple process to focus your energy and launch new levels of success



CLARITY
your what and why



TRANSPARENCY
view on plans and progress



ACCOUNTABILITY
ownership of results

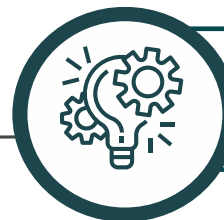
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YOU CAN'T
MANAGE
WHAT YOU
CAN'T
MEASURE



ANNUAL STRATEGIC PLANNING MEETING



Establish vision for future and set annual goals & priorities for the upcoming year

QUARTERLY BUSINESS REVIEW



Progress report on quarter priorities
Set upcoming quarter's priorities

WEEKLY TEAM MEETINGS



Review initiatives
Identify issues
Establish next steps

DAILY PRACTICE



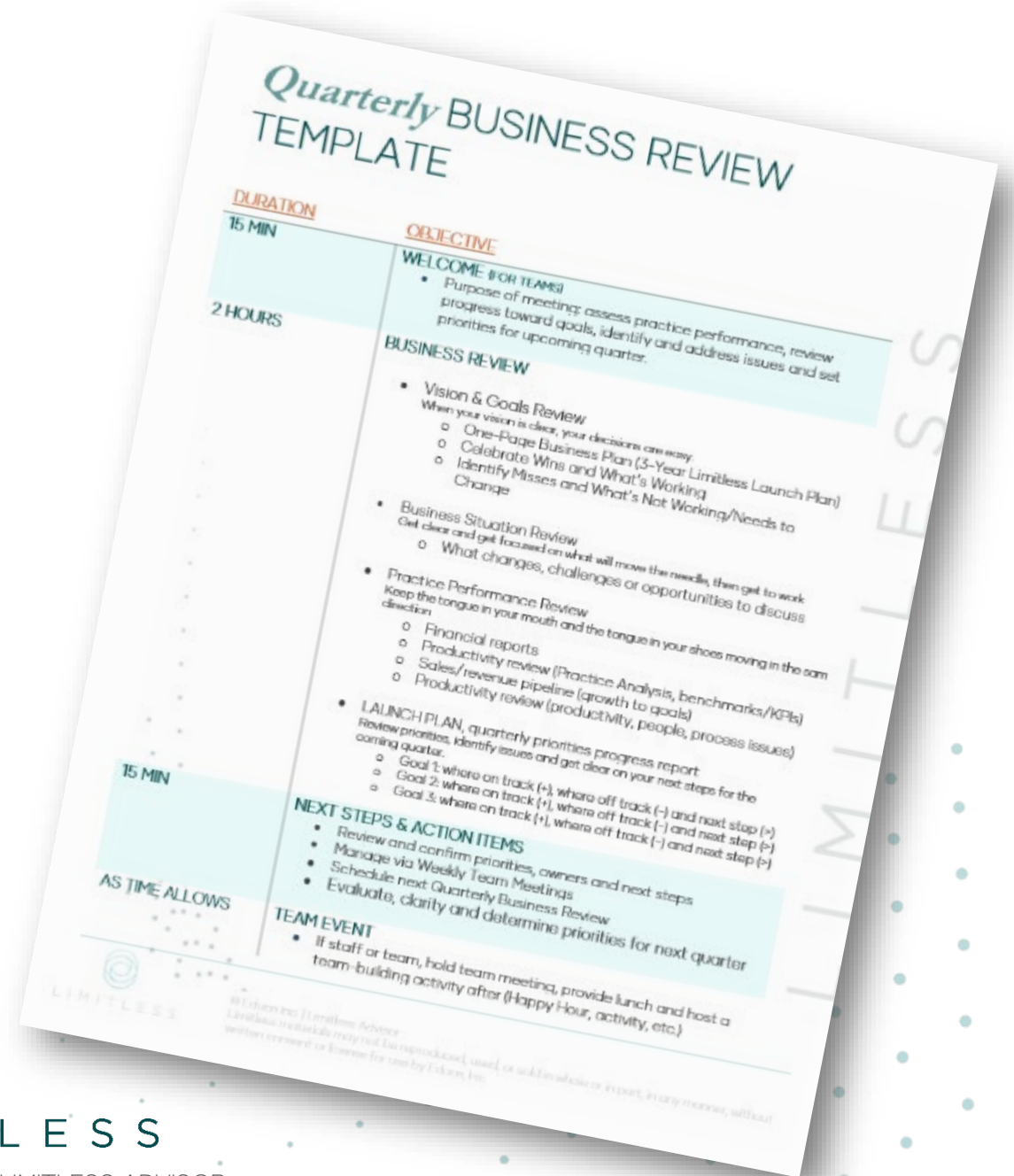
Be mindful
Be intentional
Be energized

LIMITLESS

QUARTERLY

Business Review

- Tracks quarterly progress
- Plan for next 90 days
- Focused on next 30 days increments
- Supported by Success Shifter
- Driven by weekly action plans
- Quarterly Business Review



CONTINUOUS EXECUTION

PRIORITIES


MANAGING PEOPLE, PROCESS & PROBLEMS

ANNUAL GOALS & LAUNCH PRIORITIES

- Define your goals
- Identify key objectives
- Define next quarter priorities

DETERMINE LAUNCH PRIORITIES FOR Q1

- Set Q1 Priorities
- 1 owner per priority
- Manage w/ Weekly Team Meeting



LIMITLESS

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.

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

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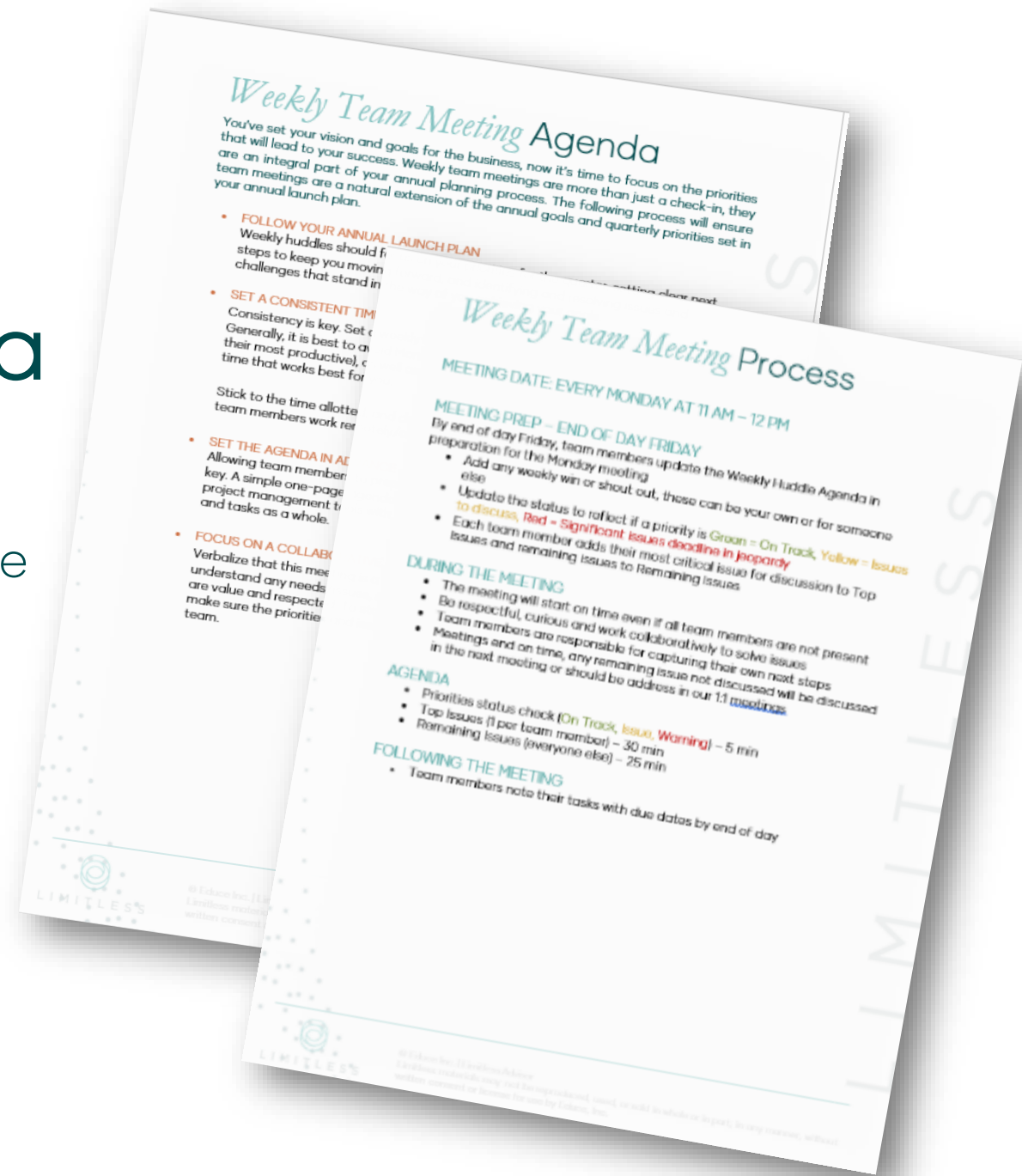
BEST PRACTICE:
use tech tools like Asana or CRM

LIMITLESS

WEEKLY

Team Meeting Agenda

- "Run the shop" day-to-day
- Maintains clarity and accountability
- Manage priorities, progress and people
- Address and resolve issues



CONTINUOUS EXECUTION

MANAGING PRACTICE PERFORMANCE

THE PRACTICE BENCHMARK ANALYSIS: BENCHMARKS & GOALS

Instructions

1. Input current and 3-year goals into the cells highlighted light blue, all other goals will calculate based on your inputs.
2. Use the dropdown to select your benchmark for comparison.
3. Review your % to Goal and % to Benchmark to evaluate your progress.

Business Performance Key Performance Indicator (KPI)	2020	2021	2022	2023 Annualized	2023 Goals	% to Current Year Goal	3 YEAR GOAL	BENCHMARK * (Select Below) \$500k-\$1M	% to Benchmark
Fee-based Clients per Total Headcount	*	*	*	*	*	*	*	n/a	*
Asset KPIs (Median)									
Assets Under Management (AUM)	\$0	\$0	\$0	\$0		*		\$92,384,957	0%
AUM per Client	*	*	*	*	*	*	*	\$767,225	*
AUM per Professional	*	*	*	*	*	*	*	\$43,593,848	*
AUM per Total Headcount	*	*	*	*	*	*	*	\$29,712,667	*
Lifestyle									
Partner Days Off	0	0	0	0		*		n/a	*
Return on Time (Revenue/Est. Hours Worked)							\$0	n/a	*

*InvestmentNews 2016 Financial Performance

Not all values are available, as such some

THE PRACTICE BENCHMARK ANALYSIS: ECONOMIC MODEL

Instructions:

1. Review the pre-populated data below to see how your firm financials are trending over time.

Year	Total Revenue	Direct Expenses Professional Comp	Indirect Expenses Staffing Comp	Indirect Expenses Overhead	Operating Profit
2020	\$ -	\$ -	\$ -	\$ -	\$ -
2021	\$ -	\$ -	\$ -	\$ -	\$ -
2022	\$ -	\$ -	\$ -	\$ -	\$ -
2023 Annualized	\$ -	\$ -	\$ -	\$ -	\$ -

100%

90%

benchmark/goal	<75% of benchmark/goal
benchmark/goal	>200% of benchmark/goal
benchmark/goal	<25% of benchmark/goal
benchmark/goal	>120% of benchmark/goal

Results Roadmap

Use this page to define the top 4 annual priorities that will really "move the needle" in achieving your goals this year. You may or may not be working on multiple priorities simultaneously, that will depend on your capacity, time and pace. These "move the needle" priorities will help you maintain clarity as you define your business priorities each quarter using the worksheet on the next page.

PRIORITY 1:	PRIORITY 2:	PRIORITY 3:	PRIORITY 4:
CLEAR/MEASURABLE OUTCOMES	CLEAR/MEASURABLE OUTCOMES	CLEAR/MEASURABLE OUTCOMES	CLEAR/MEASURABLE OUTCOMES
OWNER	OWNER	OWNER	OWNER
DUE DATE	DUE DATE	DUE DATE	DUE DATE
LESSONS / RESOURCES	LESSONS / RESOURCES	LESSONS / RESOURCES	LESSONS / RESOURCES
NOTES	NOTES	NOTES	NOTES

90-Day Launch P.A.D. Report

My Top 3 Commitments

	Due Date if applicable
1	
2	
3	

Personal Support & Accountability

Mastermind Pod: _____

Topic: _____ Coach: _____

Topic: _____ Coach: _____

Other: _____

Other: _____

90-DAY ACTION PLAN

	Due Date	Schedule	Delegate	Outsource	Revisit at Later Date



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Business Launch P.A.D.: Quarterly Review Guide

Every 90 days, review your Annual Business Launch Plan and update this worksheet to capture your progress and lessons engaged.

3-YEAR VISION

1-YEAR GOALS

TO HERE

REVENUE

AUM

OF BEST CLIENTS

OF DAYS OFF

ESSENTIALS LESSONS

STRATEGY & PERFORMANCE



Your Vision for Success

PERSONAL PRODUCTIVITY



Harness the Power of Productivity

CLIENT SERVICES



Nailing Your Niche

WOW! Service System

Setting, Sharing & Stepping up Fees

Compelling Client Meetings

ADVICE & PLANNING



One-Page Financial Plan

Managing Expectations & Objections

MINDSET



Mindset Matters

Overcoming Overwhelm

Personal Power

PEOPLE



Staffing Solutions

SYSTEMS & TECHNOLOGY



Setting Up for Scale

MARKETING



Modern Marketing

Capturing Client Referrals

Cultivating Centurs of Influence

Mastering Marketing Implementation

Mapping Your Marketing Plan

PROSPECTING



Telling Your Story

"Say Yes, No Stress" Prospect Process

Turning Passions Into Prospects



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LET'S

BREAKOUT!

What will you have to do differently to make your goals happen this quarter?

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LIMITLESS Q&A