

# LIMITLESS Coaching Call Transcript

JUNE 14<sup>TH</sup>, 2021  
LIMITLESS COACHING CALL  
MAINTAINING MOMENTUM

185

00:18:30.120 --> 00:18:41.340

Stephanie Bogan: Alright so let's talk about maintaining your momentum which is really what this program is all about, because here's what I know.

186

00:18:43.260 --> 00:18:51.960

Stephanie Bogan: any of you can do anything in this program once you decide to do it the trick is getting your mindset in the right place.

187

00:18:52.320 --> 00:19:00.330

Stephanie Bogan: Finding the right methods which you can stumble upon you've come to a great place to get the shortcuts the hacks to rip off and deploys that you know are proven practices that work.

188

00:19:00.930 --> 00:19:12.450

Stephanie Bogan: But at the end of the day, you've got to put those things together on a track that keeps you going with the focus and the energy and the pace that you need to make progress and that we like to call momentum.

189

00:19:13.020 --> 00:19:23.820

Stephanie Bogan: So today, as we hit June I really want to take a pause and talk to you about maintaining momentum and rather than having the advisor coaches we've got three of our we call them our advisor ambassadors.

190

00:19:23.850 --> 00:19:24.300

Liz Hand, CFP?: To do.

191

00:19:24.600 --> 00:19:26.550

Liz Hand, CFP?: While so I felt like it was a.

192

00:19:27.480 --> 00:19:30.300

Stephanie Bogan: Up sorry they've been around a while, which i'll talk to you.

193

00:19:30.300 --> 00:19:42.210

Stephanie Bogan: About in a minute and they've all done some great things so i've got gave Sydney and don with me today who are going to share as we talked about kind of the coaching experience that they've gone through over the last couple of years.



194

00:19:42.600 --> 00:19:48.630

Stephanie Bogan: Then we're going to talk about how that has shown up in a practical sense in terms of their business and life performance.

195

00:19:48.990 --> 00:19:57.300

Stephanie Bogan: And then we're going to go into some bench the benchmarking tool that I use to evaluate firm performance and talk through that we had gave and.

196

00:19:57.960 --> 00:20:00.660

Stephanie Bogan: don actually did the benchmark so we'll talk through that a little bit.

197

00:20:01.110 --> 00:20:11.070

Stephanie Bogan: And then we'll have another call later this quarter to dive deeper into doing that benchmark for those of you that are ready or want to go deeper so that is our agenda today and then Patrick Henry are you on the call.

198

00:20:14.460 --> 00:20:16.770

Stephanie Bogan: You got to be here you're in the hot seat today.

199

00:20:17.610 --> 00:20:24.870

Stephanie Bogan: So, Patrick Scott you're welcome i'm ready, so do you want to tell us what your hot seat issue is now so we can all start really thinking about that for you.

200

00:20:25.890 --> 00:20:34.440

Patrick H.: Yes, and I apologize, I was completely caught off guard, but I truly appreciate you put me on to this, yes I have an issue with.

201

00:20:36.000 --> 00:20:48.810

Patrick H.: Checking emails twice a day you're helping me with that I want to put it out there, because I see how deep seated it is, and it extends to other things, but i'll keep it specific to this issue challenge limitation.

202

00:20:49.080 --> 00:20:57.150

Stephanie Bogan: Great does anyone else have an issue only checking email twice a day circle of truth, the rest of you are liars right all right.

203

00:20:57.660 --> 00:21:01.740

Stephanie Bogan: Some of you are in and that's a good thing, this is one of those things that like no different than.

204

00:21:02.070 --> 00:21:10.560

Stephanie Bogan: lifestyle and eating and exercise it be like you it's a habit that you really want to condition so we'll talk through that at the end so Patrick we will make sure we have some time for that.



205

00:21:11.190 --> 00:21:16.470

Stephanie Bogan: All right, are you guys ready, can you tell that I am like I have my Monday mojo and i'm just ready to do it alright.

206

00:21:17.460 --> 00:21:21.420

Stephanie Bogan: Alright, so let's talk about one of my favorite topics which is maintaining momentum.

207

00:21:21.870 --> 00:21:29.670

Stephanie Bogan: we've talked a lot about mindset we're going to keep talking about mindset, but what I want to talk to you today is what creates momentum, or what sustains it.

208

00:21:30.300 --> 00:21:36.900

Stephanie Bogan: two essential ingredients to sustaining your momentum, and if you ever find yourself stuck or struggling.

209

00:21:37.260 --> 00:21:46.440

Stephanie Bogan: You can break it down to not feeling good right in that in our vernacular it's going to be one of these two things one it's going to be a lack of clarity around purpose.

210

00:21:46.950 --> 00:21:52.650

Stephanie Bogan: Not necessarily just the big why, but like Why am I having a Why am I doing a prestigious benchmark tool.

211

00:21:53.130 --> 00:22:04.800

Stephanie Bogan: Right it's not just some exercises, because you want an honest assessment of how your business is performing under the Hood in a way that will give you false hits excuses or lies that keep you stuck that's purpose.

212

00:22:05.220 --> 00:22:18.180

Stephanie Bogan: hey i'm going to do this thing say I did it i'm really busy i'm not going to take the time to really dive into the learning that I can get from it is not purpose, so you start to see the difference between purpose and pace.

213

00:22:18.990 --> 00:22:24.870

Stephanie Bogan: So, if you remember i've had this conversation with a couple of times now around momentum versus clarity.

214

00:22:25.950 --> 00:22:38.040

Stephanie Bogan: it's really easy when things are in a downward trend it's hard it's overwhelming I can't get out from my tesla tsunami or, this is the really scary one when things are going really well.

215

00:22:38.760 --> 00:22:43.680



Stephanie Bogan: right we get in sort of this success like it's like catching the wind or the wave in the water and you're going.

216

00:22:44.340 --> 00:22:51.660

Stephanie Bogan: And you're just feeling so good that you don't stop to ask yourself if all of these opportunities actually serve the goal.

217

00:22:52.410 --> 00:23:02.790

Stephanie Bogan: Are you investing your time to an effect that is going to net you something of value in your business your lifetime clients capital contribution, whatever is meaningful to you.

218

00:23:03.480 --> 00:23:15.540

Stephanie Bogan: And it's so easy because 80 to 90% of the time, we are in that momentum mode you come in, Patrick Henry you check your email, and what happens every single time that you do.

219

00:23:16.110 --> 00:23:29.460

Stephanie Bogan: Do you leave email going good I feel calm and clear and in control of my business in my life, that was a kick ass experience I think i'm going to do that 17 more times because it feels so good is that the experience, no.

220

00:23:30.930 --> 00:23:40.740

Stephanie Bogan: Right, the momentum is, I have a spare moment and my brain is on that sugar hat called dope me and that I get every time I check off a little email and feel productive.

221

00:23:41.910 --> 00:23:46.440

Stephanie Bogan: Right it's the difference between food and food product which I try to teach my kids.

222

00:23:47.460 --> 00:23:51.360

Stephanie Bogan: disclaimer I love food product is next to the person I let my pizza rolls and my tater tots can really do.

223

00:23:52.260 --> 00:24:04.920

Stephanie Bogan: But I also know that when I put them in my mouth they're not food their food product they are a little bits of food mashed up with other fix stuff that may or may not be amazing for me that I am putting in my food my body, because it tastes good, not because it's fuel.

224

00:24:06.630 --> 00:24:17.190

Stephanie Bogan: Right so understand the difference between pace and purpose is the difference between food, fuel and food product just stuff that keeps you freaking busy.

225

00:24:18.210 --> 00:24:29.940

Stephanie Bogan: Right this way you're tired and you can't sleep all that food products not helping your body do what it needs to do best the same way, the checking email 17 times a day or whatever is keeping you from your



purpose and progress.

226

00:24:30.690 --> 00:24:39.780

Stephanie Bogan: that's the food product that you want to eliminate from your diet doesn't serve you so get really clear intentional is the word choice here.

227

00:24:40.440 --> 00:24:48.840

Stephanie Bogan: Why did you show up today I got up this morning and I was like i'm going to show up and have a call this week about how we can really truly move the needle I feel good about that.

228

00:24:50.460 --> 00:25:00.120

Stephanie Bogan: Right, I have an intention around my day i'm clear on what's going to happen today i'm clear on my top six I know what effect i'm going to investment, what i'm going to invest my time into what effect.

229

00:25:00.660 --> 00:25:09.480

Stephanie Bogan: Step two is progress, which means we need to make at least incremental progress if you have a lot of purpose, but you make no progress, how are you going to feel.

230

00:25:11.220 --> 00:25:19.800

Stephanie Bogan: Right inspired and broke that's not a good thing for inspired and frustrated, not a good thing right progress is about can you can you pull the levers.

231

00:25:20.160 --> 00:25:28.290

Stephanie Bogan: To move the needle to make needlepoint moves not galactic shifts sometimes there's a revolution.

232

00:25:28.800 --> 00:25:34.890

Stephanie Bogan: i'm pulling up the band aid i'm raising my fees and making those transitions i'm okay with whatever the answer is is pulling the band aid off.

233

00:25:35.550 --> 00:25:37.680

Stephanie Bogan: But a lot of what you're doing is incremental.

234

00:25:38.370 --> 00:25:47.820

Stephanie Bogan: i'm going to use a one page plan with the client, for the first time, so I was on tried they're like wow this is really great i'm evolving, the way that I use it, but I can totally see how this has changed my client conversations.

235

00:25:48.270 --> 00:25:54.000

Stephanie Bogan: Right incremental progress not waiting for perfect so if you're clear on purpose.

236

00:25:54.870 --> 00:26:04.710



Stephanie Bogan: Not food product purpose when you're overwhelmed and you stop it's because the overwhelm is not aligned with your purpose and you need to recalibrate.

237

00:26:05.250 --> 00:26:13.410

Stephanie Bogan: reorganize the task list delegate to people outsource change the client profile change the fees build a service model right feedback is your friend.

238

00:26:14.070 --> 00:26:20.640

Stephanie Bogan: If you don't feel utterly intentional, in line with purpose each day and making progress, that means that there is a speed bump between you and your momentum.

239

00:26:21.390 --> 00:26:28.050

Stephanie Bogan: So just be really clear purpose and progress or your ingredients for a high performance happiness diet.

240

00:26:28.590 --> 00:26:38.340

Stephanie Bogan: that's what creates the momentum that with the right mindset, you can do it with a bad mindset, by the way you see examples of that in the world we're trying to be above the line right conscious capitalists.

241

00:26:38.760 --> 00:26:46.620

Stephanie Bogan: who use that momentum in ways that serve our businesses and our lives and that impact and contribute others for better right good stuff.

242

00:26:47.370 --> 00:27:00.840

Stephanie Bogan: that's inspired action I could go into games office sydney's office versus office brian's office and bends office and literally clear on an average day at least half of what happens, and it would be to know net deck negative effect.

243

00:27:02.010 --> 00:27:08.910

Stephanie Bogan: In terms of right planning over the longer term, because most of what we do is effort it action it's that stuff that fills our time.

244

00:27:09.180 --> 00:27:18.870

Stephanie Bogan: That we pick up that we say yes to that we compromise around and we end up having to push through all of that inspired action is a moment that every one of you is had.

245

00:27:19.140 --> 00:27:26.220

Stephanie Bogan: Where you got so clear on the purpose and your mindset and your momentum we're so in place that the action just happened the phone call ring.

246

00:27:26.760 --> 00:27:35.190

Stephanie Bogan: You got clarity about yes and i'm going to just make the leap and go ra i'm very clear on my network, whatever it is, you have that moment, where you do have that shift.



247

00:27:35.580 --> 00:27:44.340

Stephanie Bogan: Those steps when they become that clear or inspired action here's the problem, do you know why we don't spend more of our time and inspired action.

248

00:27:46.260 --> 00:27:52.590

Stephanie Bogan: Because of all the background noise that comes with all the other stuff it just suffocates the space.

249

00:27:53.250 --> 00:28:00.750

Stephanie Bogan: When you're in the shower when you're running when you're taking your dog on a walk what you know those moments where things happen.

250

00:28:01.050 --> 00:28:09.540

Stephanie Bogan: and thoughts float up it's because your mind is disengaged from the background noise and it's free to let your brain do the stuff that it does to service the answers.

251

00:28:09.930 --> 00:28:15.720

Stephanie Bogan: You have asked it for so your job as you've heard me say is to make sure you're asking better questions so you get better answers.

252

00:28:16.170 --> 00:28:21.420

Stephanie Bogan: Right what is stalking me what am I struggling with Why am I in this face Why am I struggling to get out of it.

253

00:28:21.780 --> 00:28:28.410

Stephanie Bogan: Is this a mindset or method, like you, guys have enough questions in your arsenal at this point to at least know.

254

00:28:28.740 --> 00:28:35.520

Stephanie Bogan: When you are stuck or struggling and it's not serving you and you're in the right place to write get help and support when you find yourself there so.

255

00:28:35.850 --> 00:28:46.290

Stephanie Bogan: It just really want to read ground you in the core theme and principle about maintaining momentum which is the philosophy of inspired action versus effort action.

256

00:28:46.920 --> 00:28:53.490

Stephanie Bogan: which comes when you focus on purpose and progress that is aligned with your goal.

257

00:28:54.150 --> 00:29:00.210

Stephanie Bogan: And nothing else right when you can get really directive and discerning about what's in and what's



out.

258

00:29:00.630 --> 00:29:14.460

Stephanie Bogan: that's the clarity of purpose that allows you to make progress because you're, you have the space mentally and physically to to here to surface here and act on those inspired actions, the ones that will truly get you that.

259

00:29:14.910 --> 00:29:20.610

Stephanie Bogan: hockey stick effect right, I want to pause there because I want to see if you guys have any questions around that.

260

00:29:22.140 --> 00:29:36.030

Stephanie Bogan: josh yeah see josh you're going to have a lot to do this summer inspired action josh broke his ankle so let's always josh my husband fractured his wrist mountain biking this weekend, he and another mountain biker came around a corner like this into each other.

261

00:29:37.620 --> 00:29:47.040

Stephanie Bogan: So inspired and broke yeah I was talking with someone recently who's really very good at what they do and I, and I had but they're not necessarily capitalist not in a bad way just in a.

262

00:29:47.370 --> 00:29:51.420

Stephanie Bogan: You should actually make some money for the work that you're doing and I had to remind them that.

263

00:29:51.990 --> 00:30:04.350

Stephanie Bogan: No, no comment on religion whatsoever, but I was like hey I just need to remind you that the church ain't broke spirituality is free religion has a distribution costs and that's that's what marketing is by the way, marketing is your distribution costs.

264

00:30:05.700 --> 00:30:07.410

Stephanie Bogan: All right, you guys ready to move on.

265

00:30:08.700 --> 00:30:10.320

Stephanie Bogan: All right, I know GABE is checking on.

266

00:30:11.850 --> 00:30:24.840

Stephanie Bogan: Okay, so this is the secret success triangle you guys have seen it before, but as we as got as don gave and Sydney go through kind of their performance path i'm going to ask you, questions and ask them.

267

00:30:25.230 --> 00:30:36.630

Stephanie Bogan: To really talk about it in the context of this triangle, because they're pretty familiar with it at this point state right above the line below the line success positive everything is figure out a bull can do.



268

00:30:37.230 --> 00:30:52.320

Stephanie Bogan: Right below the line negative disempowered story right, I can it's awesome i'll figure it out below the line I can't I shouldn't I won't i'm an imposter i'm not good enough if I say that's my clients, they will all walk out enraged.

269

00:30:53.850 --> 00:31:01.800

Stephanie Bogan: Really in 27 years I got my first letter to the editor for my column and investment news and somebody wrote literally if I said that to my clients, they would all walk out enraged.

270

00:31:02.790 --> 00:31:09.450

Stephanie Bogan: So I looked him up he's been in business 32 years and he's at \$30 million in revenue, so I have a feeling he might just not be.

271

00:31:09.930 --> 00:31:16.890

Stephanie Bogan: He might be a little bit resistant to things that move forward because it's scary and terrifying that's the power of story.

272

00:31:17.580 --> 00:31:24.360

Stephanie Bogan: Maybe some of your clients will walk out and rage not likely, and if you think language will do that find language.

273

00:31:24.690 --> 00:31:34.980

Stephanie Bogan: That won't do that right find the language that you can communicate what you need to communicate to clients so it's those stories that keep us from taking those next steps, because they're scary.

274

00:31:36.540 --> 00:31:44.730

Stephanie Bogan: Because we're worried about the sacrifice, but what our brains don't tell us is what we're stepping up into your brain tells you about the problem, not the possibility.

275

00:31:45.480 --> 00:31:56.310

Stephanie Bogan: It tells you about the obstacle, not the opportunity, so your job is to understand that state and story are really around staying above the line so that, as you formulate your strategy.

276

00:31:57.300 --> 00:32:04.110

Stephanie Bogan: we're doing it with a clear headspace, which means that you can do it in a way, with a clear line of sight between your actions and your behavior.

277

00:32:04.380 --> 00:32:11.370

Stephanie Bogan: And you can make sure they're aligned with your goals versus getting busy doing stuff and looking back and going oh my God can maybe I didn't need to do all 17 of those things.

278

00:32:11.700 --> 00:32:18.360



Stephanie Bogan: Maybe I didn't need to check email 19 times today, maybe I didn't need to say yes to that prospect, maybe I should have worked on my brand thing and gotten it done.

279

00:32:19.260 --> 00:32:30.990

Stephanie Bogan: So strategy is what you choose to do state in story or how you ultimately show up and do it, those are the pieces that really drive momentum so that's what I want you're saying strategies your methods.

280

00:32:31.410 --> 00:32:43.410

Stephanie Bogan: State and story or your mindset and your momentum it's do you have that energize ready to go i'm on it for you like it's really hard so wherever you are, I just want you to be really clear on that right now.

281

00:32:44.250 --> 00:32:52.800

Stephanie Bogan: So that we can really talk through the practical pieces of your business and how this relates, as the ambassadors go through their kind of their stories.

282

00:32:53.490 --> 00:33:04.800

Stephanie Bogan: Right i'm going to pause here and I want everyone to share one thing that has shown up for them up to this point in the call based on what we've talked about, and I want you to drop it in the chat.

283

00:33:05.670 --> 00:33:15.870

Stephanie Bogan: what's one thing that is really surface for you or you're like she might be onto something or oh hell no that does not apply to me she's crazy today, I welcome the challenge.

284

00:33:18.450 --> 00:33:30.030

Stephanie Bogan: All right, i'm looking at my chat, this is the interactive part, ladies and gentlemen, get to share your energy with me do you have a sales funnel setup which your sales system that's a great one inspired action versus effort and great.

285

00:33:31.350 --> 00:33:39.270

Stephanie Bogan: systems are the way to scaling not selling better, by the way, which we'll talk about incremental success, yes needlepoint moves or what get it done.

286

00:33:40.110 --> 00:33:47.250

Stephanie Bogan: Literally will talk about the summer, like you do one thing a day, every day on any project and you watch your momentum just move it forward.

287

00:33:47.730 --> 00:33:54.030

Stephanie Bogan: Negative stories are providing friction and staffing negative stories are big when it comes to people, because we don't like the conflict.

288

00:33:54.630 --> 00:34:01.320

Stephanie Bogan: That comes with what we perceive to be the conflict, on the other side of those conversations, but if you can stop purpose.



289

00:34:02.010 --> 00:34:05.280

Stephanie Bogan: My purpose in this conversation is not to beat my employee up.

290

00:34:05.850 --> 00:34:13.170

Stephanie Bogan: My purpose in this conversation is to identify the outcome that we want for this role in the company to identify breakdowns and gap or process.

291

00:34:13.440 --> 00:34:20.040

Stephanie Bogan: To communicate those in a way that allow that person to lead with dignity and get agreement on what we're each going to do to remedy that gap.

292

00:34:20.820 --> 00:34:31.500

Stephanie Bogan: Does that sound bad at all, in fact, if you have a performance problem does that sound like a really good plan yes what's the story between what Nathan, wrote and what I just said.

293

00:34:32.910 --> 00:34:40.710

Stephanie Bogan: Right somewhere in there is a story, because when I say it that way, it makes perfect sense we go into that interaction our brain goes, I want to do that that's going to be comfortable.

294

00:34:41.760 --> 00:34:49.200

Stephanie Bogan: So you see how those stories start to show up and trick us and stick us into this spot that we're in they really like to stuck us it's not a real word but I like it.

295

00:34:50.460 --> 00:34:53.880

Stephanie Bogan: purpose without progress is inspired but broke, we are not here to be broke.

296

00:34:54.720 --> 00:35:04.230

Stephanie Bogan: scary and terrifying yes, I eat your frog Okay, focusing on best use of time alright, so does everybody have a thing that they can latch on to as we move forward.

297

00:35:04.680 --> 00:35:10.620

Stephanie Bogan: And then feel free to drop questions and slide oh allison will let me know as they drop in and we'll make some time for those as well.

298

00:35:11.820 --> 00:35:21.390

Stephanie Bogan: Alright let's see alright, so this is your coaching path for the year I was talking with with the guys before the call they didn't have one of these they didn't have all these steps.

299

00:35:21.810 --> 00:35:26.700

Stephanie Bogan: They had a little bit more than the first years like it's Harry Potter or something right the first years



in the second years.

300

00:35:28.380 --> 00:35:39.270

Stephanie Bogan: And, but what they did, that is the most impactful ingredient, the one that I try to inspire and inform and extract from you, but that I cannot give you is.

301

00:35:39.570 --> 00:35:43.800

Stephanie Bogan: They had the mojo where they just went out and they grabbed what they needed and they started working on it.

302

00:35:44.760 --> 00:35:53.190

Stephanie Bogan: and gave will tell you like hey there's still stuff he still wants to work on, but you're going to see he's made such incredible progress that he has not let perfect stop him in his pursuit.

303

00:35:54.090 --> 00:36:05.910

Stephanie Bogan: So these are the steps that we are taking with you every single month to make sure that you're clear and accountable and focus and at work if you're not feeling this that's your cue this is we offering you the coaching challenge.

304

00:36:06.330 --> 00:36:16.830

Stephanie Bogan: That your job is to find out why you're stuck you have been on call you haven't been on tribe you haven't asked a question where and how can we help you because the coaching path is there.

305

00:36:17.640 --> 00:36:26.520

Stephanie Bogan: So that's just one of our honest challenge moments that I would be I would be what is that saying I would be a really bad coach if I didn't challenge you on that right.

306

00:36:27.780 --> 00:36:37.320

Stephanie Bogan: Alright, so here's what I would like to do now i'm going to ask Sydney and then gave and then dawn to walk through high level kind of where they started.

307

00:36:37.920 --> 00:36:45.030

Stephanie Bogan: And where they are now a few years later and they're not going to read everything on the slide, but I just want them to speak to the story.

308

00:36:45.450 --> 00:36:56.310

Stephanie Bogan: From the place of you see the strategies on the page you see the outcomes of those strategies, but what did they do around that triangle, to get here and what advice would they offer you.

309

00:36:56.730 --> 00:37:03.630

Stephanie Bogan: As you really work to make sure that you're making the most of the second half of our Year together so Cindy I will kick it off with you.



310

00:37:04.410 --> 00:37:15.300

Sidney Divine: All right, awesome from what you said earlier, anyone can do this, I feel like I share that with everyone because i'm not supposed to be doing this and if I can have some success.

311

00:37:15.630 --> 00:37:20.400

Sidney Divine: I feel as though everyone can have some success, I first came to limitless and.

312

00:37:21.390 --> 00:37:35.820

Sidney Divine: I actually watched the year and webinar on my honeymoon so you can imagine how life was back in the day when I needed to ask my new wife permission to watch a webinar for this great coach that I heard about on the podcast.

313

00:37:36.870 --> 00:37:44.460

Sidney Divine: The wife turned it down so that was the scary story i'm like man, this is our biggest decision as a couple and I basically have to follow suit, but.

314

00:37:45.390 --> 00:37:52.560

Sidney Divine: I found a way and was able to join limitless and now the wife, after having are almost 10 month old.

315

00:37:52.890 --> 00:38:02.490

Sidney Divine: has been off for more time since then, so that was our story, and now you know we have a completely different story, so I wrote notes, just to kind of stay on track.

316

00:38:02.970 --> 00:38:09.870

Sidney Divine: In terms of what I have done so far, raising fees was definitely one of the things that I had some.

317

00:38:10.410 --> 00:38:17.250

Sidney Divine: I guess horror stories with as it relates to my mindset and that's something that limitless has been incredible with.

318

00:38:17.820 --> 00:38:24.090

Sidney Divine: i've always knew that I delivered tremendous value to my clients, but I was scared to charge them for it.

319

00:38:24.630 --> 00:38:34.260

Sidney Divine: And since joining limitless one of the things that I kind of took away was you know you want to pay them again next year because they're awesome so you got to do something.

320

00:38:34.470 --> 00:38:41.460

Sidney Divine: And one of the things that I felt like I needed to do was raise fees, because without you guys I wouldn't have done it so that was my.



321

00:38:41.910 --> 00:38:48.210

Sidney Divine: way of holding myself accountable so since joining the program i've actually increased about 18 clients fees.

322

00:38:48.840 --> 00:38:57.870

Sidney Divine: Eight of those clients have moved up a higher fee level with me five of them have stayed on with our new associate and the others have left.

323

00:38:58.860 --> 00:39:09.420

Sidney Divine: what's interesting is six months ago we had about 54 clients our revenue was less than what it is now we've got the same 54 clients and our revenue is higher than what it was back then.

324

00:39:09.870 --> 00:39:20.760

Sidney Divine: So it was worth it, and a couple of things that i've heard from people, one of our clients who just got her first increase said that I was worth twice my weight and platinum.

325

00:39:21.210 --> 00:39:31.020

Sidney Divine: And we joked about how I needed to keep gaining weight in order to keep my value going up, and I have a best friend who's a client of mine in California.

326

00:39:31.500 --> 00:39:39.720

Sidney Divine: And prior to his becoming a client I sent him limitless is increased letter and just said hey I want to get some feedback and he said to me.

327

00:39:40.560 --> 00:39:46.470

Sidney Divine: The pandemic is going on, people are losing like a percentage of their income Sydney you'd be crazy to send this out.

328

00:39:47.370 --> 00:39:55.050

Sidney Divine: So he said that my older brother who was an accountant said that the only person who was, for it was my little sister right, so I.

329

00:39:55.410 --> 00:40:04.950

Sidney Divine: went with my little sister and I sent the letter out and it's interesting that same best friend is now a client paying what he thought other people would not pay so that's a great.

330

00:40:06.330 --> 00:40:15.360

Sidney Divine: um The other thing that happened a couple weeks ago we quoted a newer client and she said, you know what I think your fee should be half of what you're quoting me.

331

00:40:15.810 --> 00:40:27.660



Sidney Divine: And I was confident enough to say unfortunately I haven't quoted that amount since 2018 and I feel uncomfortable, especially with where our clients are currently paying and the value that we are delivering to them.

332

00:40:28.080 --> 00:40:34.830

Sidney Divine: That same client is a client now her meeting was scheduled for Wednesday she paid our invoice yesterday, so another.

333

00:40:35.280 --> 00:40:43.800

Sidney Divine: Good story and everything, I think, for me, has kind of stemmed from mindset, but if you believe it, you can achieve it like where your mind goes the rest of you will follow.

334

00:40:44.550 --> 00:40:49.440

Sidney Divine: I don't know what other weird cliches I can put into this, but let's see what else I got here.

335

00:40:49.950 --> 00:41:01.200

Sidney Divine: um i've played 55 rounds of golf so far this year and i've got three more scheduled for this year, I used to think that I needed to be in the office all the time working, all the time in order to be successful.

336

00:41:01.620 --> 00:41:12.120

Sidney Divine: And now I am seeing that that's not the case and prior to limitless I didn't necessarily know what the direction of the future for the firm would look like.

337

00:41:12.420 --> 00:41:24.870

Sidney Divine: Now I feel like I have a good guide on that and I believe in having my cake and eating it too so basically I outsource a lot of stuff so that I can continue to play rounds of golf spend time on the floor with Eva.

338

00:41:25.290 --> 00:41:34.680

Sidney Divine: hanging out with my wife, and you know, working on being as great of a husband because golf isn't in the future, for me, like I can't be a great golfer despite how hard I try guess.

339

00:41:35.760 --> 00:41:41.970

Sidney Divine: But that's it I don't know if you guys have any other questions or if I covered everything but that's that's What about.

340

00:41:42.030 --> 00:41:45.360

Stephanie Bogon: You now have a new nickname which is Sydney platinum divide.

341

00:41:45.780 --> 00:41:46.350

Sidney Divine: Oh, really.

342

00:41:47.760 --> 00:41:53.430



Sidney Divine: nicely I actually wrote the platinum number on my board so anytime I get nervous about.

343

00:41:53.520 --> 00:42:05.760

Sidney Divine: Increasing fees or even floating a fee I look at that and, like obviously other clients felt this way, even though she was the one who voiced it because other clients are paying and they're happy about it so.

344

00:42:06.060 --> 00:42:16.110

Stephanie Bogan: And the fan, I know you guys have heard me say this 100 times, but I hope what you're hearing Sydney say really reinforces it in a way that your brains like Okay, she like this will really be an okay thing is.

345

00:42:16.410 --> 00:42:21.750

Stephanie Bogan: When you always have to deliver the value like that's without question you're not going out and not delivering the value.

346

00:42:22.200 --> 00:42:28.410

Stephanie Bogan: But to once you do you start to get Okay, which sounds really uncomfortable but you start to get Okay, with the fact that.

347

00:42:28.830 --> 00:42:39.840

Stephanie Bogan: Some people aren't going to agree with you, like, I can tell you that, right now, so what happens is when that first point of resistant comes up we back off that's the crisis of confidence and what you hear Sydney talking about.

348

00:42:40.260 --> 00:42:52.110

Stephanie Bogan: Is that he was so clear in his purpose and where he wanted to go and, as he made those incremental moves which you'll see he ultimately worked on a lot of stuff but you'll see how we started is you get that confidence that hey.

349

00:42:52.560 --> 00:43:02.760

Stephanie Bogan: You know what they were right about this and it worked Okay, I can do the next thing, and the next thing, and the next thing and then you get an attract where one you can start to pace it because you realize this never ends never ends.

350

00:43:03.030 --> 00:43:04.200

Stephanie Bogan: Can want to pace yourselves.

351

00:43:04.620 --> 00:43:17.010

Stephanie Bogan: To that you control that pace, based on your progress and that you have enough presence to be intentional about it you're not just going to put stuff on your plate because that's the momentum and the habit, you are going to be discerning.

352

00:43:17.340 --> 00:43:31.470

Stephanie Bogan: about what you do and who you do it with and how you invest your time in the ways that you do it



to make sure that you are looking at everything the lens of maximum efficacy maximum experience maximum economics and maximum enjoy ability.

353

00:43:32.490 --> 00:43:37.620

Stephanie Bogan: and none of great nobody's in a million on this list, yet, but their lives are radically.

354

00:43:37.920 --> 00:43:51.090

Stephanie Bogan: Better in their practices than they were a couple of years ago because they're in the process of making those needlepoint and sometimes seismic shift so Sydney thanks for sharing that Sydney platinum divine is your new nickname.

355

00:43:51.540 --> 00:44:00.090

Stephanie Bogan: Get you a little name tag if you guys have any sessions for questions for Sydney drop them and slide Oh, we can grab them at the end gave you want to run through your story.

356

00:44:01.230 --> 00:44:01.470

Stephanie Bogan: The last.

357

00:44:02.700 --> 00:44:03.720

Gabe Nelson: The last two years.

358

00:44:04.920 --> 00:44:18.990

Gabe Nelson: Well, you guys have already heard the quote a few different times when the student is ready, the teacher appears and I spent the 2018 year thinking and watching the limitless group and then pulled the trigger in.

359

00:44:21.330 --> 00:44:28.920

Gabe Nelson: I showed up into the program thinking i'm going to learn X, but I learned y plus Z plus the rest of the alphabet and.

360

00:44:29.520 --> 00:44:45.330

Gabe Nelson: Basically, just started implementing things and put them in place, but what I really came away with in that first year was I got a mess I don't know about there's there's a few of you who've created this big ugly hairy mess of a business and I had a mess of a business when I started.

361

00:44:46.380 --> 00:44:59.430

Gabe Nelson: It was the the fear mindset that lack of abundance that i'm going to run out of clients so i'm just going to keep putting them on whether they're profitable or not, and so I started the program with.

362

00:45:00.750 --> 00:45:12.420

Gabe Nelson: 425 households all by myself, no staff, no nobody, and so I hired my first virtual assistant in March.

363



00:45:12.990 --> 00:45:22.560

Gabe Nelson: And somehow some way i've turned out to be the virtual assistant king in this program I don't quite get it other than the fact that I just keep hiring them and trying to figure out how to make them work.

364

00:45:23.850 --> 00:45:36.570

Gabe Nelson: But short sweet and simple, the first year I realized I needed to clean my mess up, and I can still remember my call with stephanie she looks me so so you've got it kind of you got kind of a crappy nonprofit here gave you got you got clients that are.

365

00:45:37.440 --> 00:45:38.640

Stephanie Bogan: happy, I know I didn't.

366

00:45:39.060 --> 00:45:44.760

Gabe Nelson: know, I was trying to keep it clean i'm trying to make sure that I don't go where I normally go, which is you know.

367

00:45:45.600 --> 00:45:48.390

Gabe Nelson: bombs so i'm trying to keep it clean so anyways.

368

00:45:48.630 --> 00:45:53.880

Gabe Nelson: It was a crappy nonprofit that I had so I sat back and I looked at my practice, and I said Okay, where do I gotta go.

369

00:45:54.420 --> 00:46:04.380

Gabe Nelson: And that's I needed to right size, this practice and I needed to start getting the practice where it should be so I raised my fees in that first year I transitioned 40% of my practice out.

370

00:46:04.800 --> 00:46:16.620

Gabe Nelson: It was 160 households that I moved away and then really started to move the needle in the second year, where we just kept moving forward and moving forward.

371

00:46:17.610 --> 00:46:29.430

Gabe Nelson: Which set me up for a lot better revenues my expenses were still up a little bit, and then I just kept focusing on okay what's next and I decided to launch a podcast.

372

00:46:30.450 --> 00:46:46.740

Gabe Nelson: i'm authoring a book, which will then come out here January 11 of 2022 and basically have continuously just focused on how can I continuously streamline this business because i'm trying to.

373

00:46:47.460 --> 00:46:57.570

Gabe Nelson: Keep from getting jealous when I look at the revenue per client that the other guys have here i'm sitting at a measly 3100 and we're looking at eight grand and seven grand my egos hurt just a little bit.



374

00:46:58.620 --> 00:47:03.540

Gabe Nelson: But i'm making more money than they are self and i'm pretty darn profitable so.

375

00:47:06.540 --> 00:47:19.530

Stephanie Bogan: just goes to show right like the yardstick that you measure by like the industry is so good at giving us right this a human this revenue it doesn't talk about he bought it doesn't talk about like it doesn't talk about anything that makes the AU in revenue worth having.

376

00:47:20.100 --> 00:47:22.500

Stephanie Bogan: Again, those are the economic engines, but.

377

00:47:22.920 --> 00:47:33.930

Stephanie Bogan: That that's what I love about this program is it's you know gave will beat himself up, but right two years ago, if I had said hey you're gonna like these are going to be your stats he would have been like I don't care what anyone else is doing.

378

00:47:34.260 --> 00:47:44.100

Stephanie Bogan: This is amazing that's the cost of comparison right is that, like the energy just in thinking that is disempowering so one day gave you guys stop doing that.

379

00:47:44.430 --> 00:47:54.270

Stephanie Bogan: Because what I want you to focus on you all do this when you're like oh I haven't done everything in limitless i'm behind oh it, you know if you're in there, like oh it's not worth it.

380

00:47:54.540 --> 00:48:02.640

Stephanie Bogan: People have literally turn things around in October, no joke, and none of you, I read the survey results they're awesome none of you seem to be in that boat that's good thing.

381

00:48:03.390 --> 00:48:10.500

Stephanie Bogan: But my point is like six months is a lot of time to move that needle and something that gave said that I think is really important is.

382

00:48:10.830 --> 00:48:17.220

Stephanie Bogan: He talked about like and I see that one of you Scott has a question so Scott, if you can drop that in slider we'll make sure we try and get to it at the end is.

383

00:48:17.610 --> 00:48:28.020

Stephanie Bogan: He did that gave I want you to here's the, this is what our brains, do you got those numbers, while get it right transitioning out 40% of your clients.

384

00:48:28.770 --> 00:48:38.430

Stephanie Bogan: So to double your revenue in two years, while transitioning out 40% of 425 clients is massive.



385

00:48:39.240 --> 00:48:46.710

Stephanie Bogan: And what it does is it's like when you know when they go up in the hot air balloons and you throw the bags off to lighten the load that's what gave is doing.

386

00:48:47.340 --> 00:48:58.560

Stephanie Bogan: Is no matter where you are if you're in that your larger mid you know who I call it the bento box versus the spaghetti bowl it's like i'm tying a necklace if you have necklaces or wives and spouses necklaces.

387

00:48:58.860 --> 00:49:05.430

Stephanie Bogan: When a necklace you really love gets super knotted up you kind of do the painstaking work of i'm nodding and where you just ditch it.

388

00:49:06.420 --> 00:49:11.460

Stephanie Bogan: you're not going to ditch your practices you're in that pain, some of you were in that painstaking work.

389

00:49:11.820 --> 00:49:20.820

Stephanie Bogan: and your reality is just get okay with that and that's why we share these stories, is it wasn't like some big seismic shift you'll see in a minute, it was a lot of needlepoint moves.

390

00:49:21.510 --> 00:49:30.480

Stephanie Bogan: So gave I want you to just one, there are a lot of people who would love, they will get they joined this program they would love anything to have this kind of results in two years, so.

391

00:49:30.870 --> 00:49:37.620

Stephanie Bogan: That is a real success shot in the arm so don't discount I mean literally if you if you can do that we're getting rid of almost half your clients it's pretty impressive.

392

00:49:39.630 --> 00:49:44.730

Gabe Nelson: yeah and and i'll gladly address that towards the end like there was a question about you know how did I transition them off.

393

00:49:45.540 --> 00:49:54.540

Gabe Nelson: And I do want to add one other point in my very first retreat and this just kind of goes to the as you guys see things throughout the time that you're in this program.

394

00:49:54.930 --> 00:49:59.250

Gabe Nelson: it's amazing how they come back, I can remember the very first retreat stephanie stood up on the.

395

00:49:59.610 --> 00:50:06.090



Gabe Nelson: stage in March and basically said that you know you're going to be able to raise your fees and you're going to you know transition clients often it's gonna be like nothing.

396

00:50:06.690 --> 00:50:10.620

Gabe Nelson: i'm like bullshit it's not going to be nothing that's going to be hard as hell.

397

00:50:11.070 --> 00:50:19.950

Gabe Nelson: And I can now here, I say you know, nearly two years later it's a piece of cake i've got 2401 k's on transitioning away that.

398

00:50:20.370 --> 00:50:34.050

Gabe Nelson: i'm going to be now under easily under 200 households here in my profits are going to go up like crazy because they were not overly profitable and i'm like all right who else can I get rid of, I mean I you said it stephanie on, and I was like.

399

00:50:34.950 --> 00:50:36.870

Gabe Nelson: I tell the joke every time because.

400

00:50:36.870 --> 00:50:42.030

Stephanie Bogan: People don't believe in like we're going to do this you're going to have these white I call them white knuckle moments you're going to be like.

401

00:50:43.350 --> 00:50:52.740

Stephanie Bogan: you're going to push through that because i've shown you 50 examples of people who have followed the advice gotten the right that's why I keep hitting you with them over and over and over again, so your brain believes me.

402

00:50:53.010 --> 00:50:58.620

Stephanie Bogan: you're going to get on the other side of it, two or three in and you're going to if you were a private client, you would call me and be like.

403

00:50:59.160 --> 00:51:09.300

Stephanie Bogan: Oh, my God who's next and like I have clients who are like let's do another read like no like slow your roll it becomes a habit not it ditching people.

404

00:51:10.320 --> 00:51:21.360

Stephanie Bogan: It becomes a habit of discernment can we add equitable what I call reciprocal value can I add as much value to their business and life.

405

00:51:21.750 --> 00:51:28.890

Stephanie Bogan: Is they can add to mine relative to the value exchange and just because you might be in different places doesn't mean you're bad and greedy.



406

00:51:29.130 --> 00:51:32.460

Stephanie Bogan: And it doesn't mean that they're cheap and lazy it just means that you're in different places.

407

00:51:32.820 --> 00:51:41.160

Stephanie Bogan: But there's plenty of people up here and you get this level of discernment when you get that confidence and you hear people say you're so worth this.

408

00:51:41.730 --> 00:51:47.310

Stephanie Bogan: The next time someone doubt you you're like some will some won't so what so who's next as opposed to I suck.

409

00:51:47.970 --> 00:51:56.040

Stephanie Bogan: that's the shift and man when you get there you start to make decisions that you wouldn't make before and like you raise your fees there's nothing you can't do.

410

00:51:56.790 --> 00:52:02.610

Stephanie Bogan: So I was talking with GABE i'm going to do if you guys were on tribe i'm going to do another moonlight marathon would do a half marathon.

411

00:52:03.270 --> 00:52:05.190

Stephanie Bogan: In December you're all invited, if you want to come.

412

00:52:05.700 --> 00:52:14.700

Stephanie Bogan: But I was saying to him because it's like this crazy cool adventure race you're climbing trees muddy ditches headlamps at night super fun obviously doesn't everybody want to do that.

413

00:52:15.150 --> 00:52:29.850

Stephanie Bogan: And I seen her the best part was in the middle of it you're like this sucks this sucks what was I thinking this hurts so freaking bad and then you have to remind yourself, I know, like this was a goal, I can do this, and then you get to the end, and you know how you feel at the end.

414

00:52:30.930 --> 00:52:41.490

Stephanie Bogan: And invincible I was like oh my God there's nothing in that office that can even slow me down I just conquered a mountain in the rain at night with a headlamp.

415

00:52:42.120 --> 00:52:57.000

Stephanie Bogan: I got this so it doesn't mean you have to climb the mountain it's about that's what leader raves about challenging yourself to tackle that mountain whatever it is for you so gave and Sydney hit those done an incredible job of that, as has down down you there.

416

00:52:57.510 --> 00:52:58.050

Don Hilario, CFP?: i'm here.



417

00:52:58.620 --> 00:52:59.730

Stephanie Bogan: i'm here at Google or.

418

00:53:00.420 --> 00:53:01.980

Don Hilario, CFP?: No all right.

419

00:53:02.010 --> 00:53:04.110

Stephanie Bogan: When I give us your your success story.

420

00:53:04.380 --> 00:53:05.160

Don Hilario, CFP?: yeah yeah.

421

00:53:06.330 --> 00:53:10.590

Don Hilario, CFP?: i'm just always appreciative of hearing Cindy engage stories it's awesome.

422

00:53:10.770 --> 00:53:22.380

Stephanie Bogan: You know what I love about this program is I swear everybody is so humble everyone's like oh I just love hearing everyone else, I just love that everyone's like everyone is here to help each other, be successful, which is that's the point all right.

423

00:53:22.410 --> 00:53:34.590

Don Hilario, CFP?: i'm sorry for the interruption, no, no that's that's a great segue because i'm I was trying to think crowd sydney's going to kill it he did gave them the killer he did now no now speed right great um.

424

00:53:34.830 --> 00:53:39.540

Stephanie Bogan: i'm going to try and make it does catch that head trash sneaking in what do you what's that story that you hear right there.

425

00:53:40.650 --> 00:53:46.380

Stephanie Bogan: Right GABE said it in some way, shape or form right i'm not as good as those guys my number in that box is different.

426

00:53:46.890 --> 00:53:50.610

Stephanie Bogan: you hear dawn the guy he was talking about one of them going.

427

00:53:50.910 --> 00:54:00.300

Stephanie Bogan: i'm not as good as those other guys you guys heard that story about the small firm that looks at the medium firm and the medium firm wants to be like the big firm, the big firms, looking at the small firm because they're all quick and nimble.



428

00:54:01.470 --> 00:54:15.600

Stephanie Bogan: laughs love the heck out of where you are, if you learn to love, where you are you're in a much better space to embrace going forward, because if you are not loving where you are, you are in a zone that feels bad and you will not get in that conscious space.

429

00:54:16.020 --> 00:54:23.700

Stephanie Bogan: To make a line decisions, we know that, because if you would have if you were going to do it, you would have done it already.

430

00:54:25.410 --> 00:54:31.920

Stephanie Bogan: that's why we're constantly coming back at you would like where's your headspace right what what's going on in there, because we know the methods are there.

431

00:54:33.090 --> 00:54:35.670

Stephanie Bogan: All right, Don, yes I love the Google trip behind you too.

432

00:54:36.000 --> 00:54:36.690

Don Hilario, CFP?: yeah awesome.

433

00:54:38.040 --> 00:54:50.460

Don Hilario, CFP?: i'm going to i'll tell my story using state storage strategy it helps me stay organized so before them in this, I had no concept of like above the line below the line I just knew, sometimes I felt really.

434

00:54:51.120 --> 00:55:01.740

Don Hilario, CFP?: awesome with the work I do and then other times i'm like undeserving and then my strategy was, like all over the place, you know it's just not really.

435

00:55:02.940 --> 00:55:10.770

Don Hilario, CFP?: Seeing my book of business has like a niche or niche you know call richards vernacular but then literally like year one.

436

00:55:12.240 --> 00:55:14.010

Don Hilario, CFP?: You know the fire hose of information.

437

00:55:15.420 --> 00:55:20.220

Don Hilario, CFP?: I was probably the first guy to get really lit by the bar because i'm like open bar the scope right.

438

00:55:20.580 --> 00:55:20.880

Don Hilario, CFP?: But.

439



00:55:21.720 --> 00:55:23.940

Don Hilario, CFP?: But that's when I knew okay well you know you only get better.

440

00:55:25.260 --> 00:55:33.750

Don Hilario, CFP?: And then hearing stephanie seeing stephanie like live, I thought okay this like head trash go for it, because what what you're when did for me.

441

00:55:34.560 --> 00:55:44.580

Don Hilario, CFP?: It gave me permission to to acknowledge that it's okay to have my own like you know head trash whatever want to call it, I didn't know the concept of like.

442

00:55:45.390 --> 00:55:54.270

Don Hilario, CFP?: cultivating habits and so forth, and like yeah sure like I would really like Anthony robbins you know all these other high performance stuff but to hear it live.

443

00:55:54.780 --> 00:56:01.920

Don Hilario, CFP?: among my peers, who have billion dollar practices i'm thinking Okay, if this is the blueprint, I can either.

444

00:56:02.790 --> 00:56:13.500

Don Hilario, CFP?: keep telling my self like I can't do it, or the whole undeserving thing or finally own it because i'm investing in this, so I might as well, like just do it i'd be unapologetic so you're one.

445

00:56:14.880 --> 00:56:21.720

Don Hilario, CFP?: I really made the effort to to stay above the line that inspired state like it's super helpful.

446

00:56:22.950 --> 00:56:31.440

Don Hilario, CFP?: I made, I maintain my one on ones with stephanie Lisa dander I remember dateline I asked her what what's the number one thing I can do to get the most of this program she told me engage.

447

00:56:32.130 --> 00:56:44.640

Don Hilario, CFP?: So I wrote this down, aside from like having my niche I really focus on that fine tuning my my service and i'll break down the quiet because i'm all about the numbers to.

448

00:56:45.990 --> 00:57:03.960

Don Hilario, CFP?: I gotta get my pod so much credit like I still have the same pod going on what this is my second year, plus six months now, what am I pod there's there's no way, hence them I could I could just you know excel in this program so three times now my pod awesome.

449

00:57:07.740 --> 00:57:11.250

Don Hilario, CFP?: When when I told myself okay so i'm not gonna.



450

00:57:12.390 --> 00:57:19.830

Don Hilario, CFP?: Think about it too much to like do the searches i'm not going to email a letter i'm just going to do it i'm just gonna say okay great what's that.

451

00:57:20.460 --> 00:57:24.660

Don Hilario, CFP?: Automatic scheduled Kelly alright that looks easier than acuity booking count done.

452

00:57:25.230 --> 00:57:32.040

Don Hilario, CFP?: And then not even asking my clients what they think about it right okay boom, I even call it search if you go on my website, it says search right and then.

453

00:57:32.550 --> 00:57:38.010

Don Hilario, CFP?: One of my good lawyers asked me what what does that mean, but then on the spot, I thought crap what do I do.

454

00:57:38.520 --> 00:57:50.070

Don Hilario, CFP?: i'm going to come up with an acronym right so that that that that's another story itself, but for year one I pretty much kept my head down knowing, knowing that I wasn't alone.

455

00:57:50.640 --> 00:57:55.620

Don Hilario, CFP?: In these like below the line above the line mindsets and actually fueled me I thought I can either.

456

00:57:56.610 --> 00:58:11.370

Don Hilario, CFP?: Just to be honest, be like the herd or I can just focus keep my blinders on and then at the end of year one, I want to be there be there, meaning like okay I this is how i'm motivated I see stephanie limitless as my coach and how do I want to you know.

457

00:58:12.630 --> 00:58:23.190

Don Hilario, CFP?: make my coach proud, I want to hit my numbers, so I thought okay mathematically if i'm going to meet two to three times per week during search and i'm going to do that for eight weeks that's 72 times.

458

00:58:23.850 --> 00:58:35.190

Don Hilario, CFP?: Can I prepare for every meeting for every household deliver where i'm not encroaching beyond I don't know 2830 hours per week so before I knew it after your one.

459

00:58:37.080 --> 00:58:43.140

Don Hilario, CFP?: My meetings for the organized I got really comfortable with my tech stack like.

460

00:58:44.220 --> 00:58:51.150

Don Hilario, CFP?: i'm not confident in a lot of things, but I respectfully challenge anyone to do a one page plan like me there's no way, and I say that.



461

00:58:51.750 --> 00:59:05.850

Don Hilario, CFP?: Not using stephanie isms here right now tools press but to impress upon you, that I own that one page mentees right like there's there's no way I can I can give you a checklist but you'll never do it like, and I mean that that's like just just be owning my practice.

462

00:59:05.850 --> 00:59:07.860

Stephanie Bogan: I guess a tribe top challenge on.

463

00:59:08.580 --> 00:59:09.180

Don Hilario, CFP?: yeah bring it on.

464

00:59:10.920 --> 00:59:14.910

Stephanie Bogan: He wants to have done walk through is super cool tech stack one page plan, I want to know.

465

00:59:17.100 --> 00:59:18.120

Don Hilario, CFP?: Oh crap okay.

466

00:59:18.180 --> 00:59:18.420

yeah.

467

00:59:19.650 --> 00:59:33.930

Don Hilario, CFP?: Oh, and you know what i'm so so I got really clear with my one page plan and then that helped me find my practice and say Okay, it takes me, maybe one to one and a half hours to prepare I just did the math backwards right reverse engineered it.

468

00:59:34.710 --> 00:59:39.570

Stephanie Bogan: keeping in mind don has no support staff so he is doing this from the absolute.

469

00:59:40.080 --> 00:59:41.940

Stephanie Bogan: no excuses zone.

470

00:59:42.690 --> 00:59:55.080

Don Hilario, CFP?: yeah I saw me see some shout out a Whitney Whitney majors on number one upon number so to go to the clinic my process it really helped me just keep my head down and streamline my business because I knew.

471

00:59:56.160 --> 01:00:08.670

Don Hilario, CFP?: The size, the Bach and all those numbers I knew that in year one I just need six to 12 new niche clients and I think like year one or year to especially I just I blew it off the handle.

472



01:00:09.090 --> 01:00:16.380

Don Hilario, CFP?: Like I look at my revenue was like holy cow what am I going to do with all this like it's like state taxes, so I am I pretty much.

473

01:00:16.410 --> 01:00:19.950

Stephanie Bogan: repeated the price files on his way to helping you all of us with that.

474

01:00:21.390 --> 01:00:26.160

Don Hilario, CFP?: And, and then gear to is more the same right but here's here's a different thing.

475

01:00:26.850 --> 01:00:36.570

Don Hilario, CFP?: I neglected the mindset, because I got so jazzed about my performance in year one, and then I just repeated the process gets doing my searches for fine refining people i'm going to work with.

476

01:00:37.080 --> 01:00:46.740

Don Hilario, CFP?: And I got burned out like I remember I don't know if it was October, or like q3 or Q4 and had a one on one with stephanie and I was saying how wow i'm gonna hit my numbers again and.

477

01:00:47.040 --> 01:00:54.120

Don Hilario, CFP?: My goals, this was kind of influenced by Adam or no fruit salad on to shout out at home right but I thought oh that's pretty cool you know, keep keep did like.

478

01:00:55.530 --> 01:00:56.850

Don Hilario, CFP?: 100,000 new revenue.

479

01:00:59.130 --> 01:01:01.740

Don Hilario, CFP?: goal be nice that'd be nice and I think yeah.

480

01:01:03.150 --> 01:01:04.080

Don Hilario, CFP?: Every year hundred thousand.

481

01:01:06.150 --> 01:01:13.170

Don Hilario, CFP?: But I got burnt out in here to like I wasn't enjoying the process, I felt like man, this is worth it, I just don't want to do it.

482

01:01:13.680 --> 01:01:23.850

Don Hilario, CFP?: So then stephanie help me remember it's really about the mindset right gotta come from an inspired state and the hack that she gave me what if it works and it feels good just do it.

483

01:01:25.080 --> 01:01:28.860

Don Hilario, CFP?: i'm loving these chats, by the way, during me off, but shut down Thank you awesome.



484

01:01:29.100 --> 01:01:45.420

Stephanie Bogan: So that's here, let me just test does it work hand and because this is not what most consultants can come here a success, people will tell you, does it feel good most of our success is created without a single consideration to how it feels.

485

01:01:46.320 --> 01:01:51.420

Stephanie Bogan: yeah I don't think I get to be successful unless my family says i'm successful.

486

01:01:51.570 --> 01:01:53.010

Don Hilario, CFP?: As a big time so.

487

01:01:53.280 --> 01:01:55.440

Stephanie Bogan: So what happened was after yours.

488

01:01:56.400 --> 01:02:02.970

Don Hilario, CFP?: I year three I made a point to invest my time and, like meditating just journaling and it it.

489

01:02:03.510 --> 01:02:08.760

Don Hilario, CFP?: And I spend less time in my numbers and then to be honest in preparing for this meeting I didn't do the.

490

01:02:09.300 --> 01:02:21.480

Don Hilario, CFP?: benchmark practice until until we had to do it, and then, when I saw the numbers i'm like wow come on like that, then, by the way, gave yeah when I saw the numbers want to offset these numbers, the old me would have been like a sock.

491

01:02:21.750 --> 01:02:23.190

Don Hilario, CFP?: sock shouldn't even be here.

492

01:02:23.820 --> 01:02:29.010

Don Hilario, CFP?: And now i'm like having fun with that i'm like Oh, I see you see me okay yeah let's go on, you want it, you want to reach these.

493

01:02:29.250 --> 01:02:37.170

Don Hilario, CFP?: scopes I never sees right, that was a limiting belief that's Okay, they gave i'm thinking yeah but you know he's he's he's he's older than me sorry sorry, you know.

494

01:02:37.710 --> 01:02:41.880

Don Hilario, CFP?: Like you're looking at my humor right it's all good, the reality is I don't.



495

01:02:43.050 --> 01:02:55.350

Don Hilario, CFP?: I don't care if I hit this year with like another 100,000 what I care more about is i'm always smiling in the moment and my clients are okay.

496

01:02:55.830 --> 01:03:12.240

Don Hilario, CFP?: That, that is, that just gives me about the line and what's funny is I don't do any strong marketing right but I get constant referrals and i'm thankful for that follow the whole like workflow that this does you know all these amazing resources but but to close this out.

497

01:03:13.440 --> 01:03:25.500

Don Hilario, CFP?: Looking back so it'll it'll be three full years at the end of this year aside for me lengthen getting my benchmarks my my goals and so forth, is a really cool thing, and again I want to stephanie health is too.

498

01:03:26.520 --> 01:03:44.160

Don Hilario, CFP?: So my my niches Google right, I can say that the average age is like 39 to 40 right and what's really cool is after after two years i'm like my niche and stephanie helped me get that out because i'm thinking like here's my business plan I gotta find my niche.

499

01:03:44.310 --> 01:03:50.610

Stephanie Bogan: It was like I gotta hit this goal, I gotta hit this number to be here by the 250 and I was like can we stop the second that was like.

500

01:03:51.090 --> 01:04:02.490

Stephanie Bogan: you're the same age as your clients your economics, are now awesome like your clients and you have another template you know and and like you have another 10 years to go and he was like.

501

01:04:03.030 --> 01:04:12.030

Stephanie Bogan: was like so basically you're already there like literally there but unable to enjoy it because we're striving for that number.

502

01:04:12.450 --> 01:04:21.150

Stephanie Bogan: That we think will create some form of significance it doesn't mean the growing is bad I love to grow, but I had to learn that sometimes that striving that momentum over clarity.

503

01:04:21.480 --> 01:04:30.930

Stephanie Bogan: Is because the stories are driving us because we're stuck in the pattern of saying yes, because we're you know we just haven't broke that condition chain we're afraid of what the changes will mean.

504

01:04:31.230 --> 01:04:41.700

Stephanie Bogan: We write our beliefs are this is as good as it can get so when we can get unstuck you start to see like the doors just open wider and wider and their momentum.

505



01:04:42.390 --> 01:04:51.330

Stephanie Bogan: Again, not perfect, like notice those course corrections that's because it's like the matrix right you're always going to be aware of how your business works and does it feel good.

506

01:04:51.960 --> 01:04:59.010

Stephanie Bogan: Because you've been here but that's a really good litmus test, because at the end of the day, it's, what are the yard sticks.

507

01:04:59.580 --> 01:05:09.390

Stephanie Bogan: By which you're going to measure your definition of success and dawn's is different than games is different than ben's is different than dan's is different than Liz.

508

01:05:09.990 --> 01:05:18.600

Stephanie Bogan: Then is different than sydney's is different than mine right we all want our version of the five freedoms and that wildly successful business and in life that we love, but as john pointed out.

509

01:05:18.960 --> 01:05:21.780

Stephanie Bogan: We have to figure out what levers we each need to pull.

510

01:05:22.410 --> 01:05:29.670

Stephanie Bogan: And then the resources and the methods are all there for you, so I want to thank all three of you for sharing because those are some really epic shares.

511

01:05:30.000 --> 01:05:38.790

Stephanie Bogan: What you did not hear any of them say was I hit it out of the gate I went straight to the moon, and you know I faced no resistance whatsoever.

512

01:05:39.870 --> 01:05:43.830

Stephanie Bogan: He didn't hear any of them say that right they all talks about the work.

513

01:05:44.370 --> 01:05:56.280

Stephanie Bogan: That they had to do 90% of which happens between your ears, because once you decide right it's executing right the rip off and deploy pass resources and tools for just for for most everything are there.

514

01:05:56.760 --> 01:06:08.010

Stephanie Bogan: So I just want to pause or thank the three of you one for just being so committed to your success and courageous enough to take the steps and make the changes that created that reality for yourself, because I want you guys to know.

515

01:06:08.550 --> 01:06:23.610

Stephanie Bogan: You did that 100% you own the outcome that you see on the screen, you made a decision, a commitment you engaged in the changes that's how you exercise control over your situation you create.



516

01:06:24.480 --> 01:06:33.180

Stephanie Bogan: You create you create the life that you want not right crunch everything until you do more and more harder and harder tighter and tighter.

517

01:06:34.230 --> 01:06:40.140

Stephanie Bogan: All right, Okay, so thank you guys for that and now let's talk a little bit about the past that you took.

518

01:06:40.890 --> 01:06:53.340

Stephanie Bogan: So I know, one of the things that you guys are often working on, is what comes next what have I done sometimes it's hard to capture you're all in a slightly different passes the beautiful thing about limitless is, we can give you the track.

519

01:06:53.790 --> 01:07:02.580

Stephanie Bogan: and make sure all the bases recovered deeper and broader than you can go in a year the hard part about it candidly is you've got afford to track so.

520

01:07:02.880 --> 01:07:10.080

Stephanie Bogan: This is one of the tools that allison and I came up with, and we had done and gave fill it out actually in retrospect, because they did not have this tool.

521

01:07:10.830 --> 01:07:18.930

Stephanie Bogan: But I asked him to kind of go through, and just to the best of their ability think through what they did, and in what order so you could start to see.

522

01:07:19.290 --> 01:07:29.280

Stephanie Bogan: You know, like you notice that right don really got started I get a lot of up here, he really started to pick up on that in your three like this, so he started working on these things added these.

523

01:07:29.610 --> 01:07:39.840

Stephanie Bogan: So the things with multiple checks obviously are things that once you start you're continuing to work on, but if you if you got rid of all the checks behind them what you would see is not that many things on the page.

524

01:07:42.840 --> 01:07:52.620

Stephanie Bogan: They didn't do 12 things in a year they did a few like a couple, in most cases, and then all that you came here for X, but you get why ABC and the alphabet soup with it.

525

01:07:53.190 --> 01:08:01.560

Stephanie Bogan: All that layers in and you guys absorb and digest and use that in your practice in whatever ways work for you and there's a ton of value in that stuff we just can never predict it so.

526

01:08:01.800 --> 01:08:09.540



Stephanie Bogan: This is a tool that I want you guys to use allison will drop it in the chat and it's on it'll be in the next inbox and in the resource library.

527

01:08:10.260 --> 01:08:17.340

Stephanie Bogan: But I want you to just use this if it's helpful to you to think through the core lessons that we've covered what have you started.

528

01:08:17.760 --> 01:08:24.270

Stephanie Bogan: And or use a different pin rate use an extra why, however, you want to do it, you just get clear on what path you have covered.

529

01:08:24.930 --> 01:08:32.070

Stephanie Bogan: Your one, two or three For those of you who've been here more than one year for those of you who are new you can literally take this.

530

01:08:32.670 --> 01:08:39.720

Stephanie Bogan: And map out a three year path like hey Clinton, if I were going to just say this is your one and then it's year two and then it's your three.

531

01:08:40.020 --> 01:08:49.440

Stephanie Bogan: How would, I think I want to go through these lessons not that you can't implement a couple questions from the one page plan, but are you ready to make that big change this quarter or is it something else.

532

01:08:49.860 --> 01:09:05.430

Stephanie Bogan: So it's really just a very simple page but it's designed to help you have a forcing mechanism for picking something each quarter literally just a in my working on something from the last quarter that right it's not done or am I starting something new.

533

01:09:06.720 --> 01:09:13.800

Stephanie Bogan: So GABE and don talked a lot and, as did send me about kind of the changes they made so i'm not going to make them talk through the sheets but.

534

01:09:14.670 --> 01:09:32.370

Stephanie Bogan: What I want you all to do is type something in the chat box, what is the thing that you are working on right now, if I said to you what box, can you check or boxes, can you check on this page for this year, if you can drop in the chat box what those would be.

535

01:09:33.510 --> 01:09:46.020

Stephanie Bogan: So Scott Sullivan, like what have you worked on this year right what goes in the chat box, I am not looking for a list of seven, by the way, i'm just looking for Kelly raising fees Whitney branding when you come into the brand boot camp.

536

01:09:47.100 --> 01:09:51.300



Stephanie Bogan: I hope so that's gonna be so fun you guys know is like one of my favorite things in the whole world.

537

01:09:52.140 --> 01:10:03.810

Stephanie Bogan: To get really excited about it, telling your story fees niche communicating my value finding my fees, yes, I am yeah productivity prospecting surges one page plan hiring staff that's a lot of stuff.

538

01:10:05.340 --> 01:10:13.620

Stephanie Bogan: Right, so you are each getting something that is hopefully according to your survey results more than worth the price of admission will share those with you and our next call they were really great.

539

01:10:14.910 --> 01:10:23.430

Stephanie Bogan: So just use this if it's helpful if it's not don't you know don't create work for yourself, this is not that is not the assignment the assignment is, can you get clear on what you've done.

540

01:10:23.910 --> 01:10:34.770

Stephanie Bogan: And if you were going to map out the next one, two or three years, how would you map it in terms of order of operations, just as simple exercise to help you guys focus as we run into the second half of the year.

541

01:10:36.150 --> 01:10:42.570

Stephanie Bogan: Does anyone have questions about what might go on their map that they want to talk through, because we can drop you in the hot seat.

542

01:10:47.370 --> 01:10:48.750

Stephanie Bogan: Look at all those takers.

543

01:10:50.550 --> 01:10:55.530

Stephanie Bogan: You know, someone called my office last week and they could not get a call with me because I don't have any time.

544

01:10:57.090 --> 01:11:03.960

Stephanie Bogan: So if you have a question feel free to ask it, because this is where I'm choosing to spend my time, so please ask questions.

545

01:11:04.500 --> 01:11:11.400

Stephanie Bogan: All right, what are some forcing mechanisms for not checking email, we are going to actually get to that when we get to pat's hot seat, because I know a lot of you have that one.

546

01:11:12.270 --> 01:11:21.240

Stephanie Bogan: curious about how how some have check marks every quarter is that constant refinement I'm going to let gawe and done speak to that is that your constant refinement or you just redoing their record.

547



01:11:23.130 --> 01:11:27.750

Gabe Nelson: constantly refining I am constantly going over everything and.

548

01:11:29.340 --> 01:11:35.520

Gabe Nelson: Trying to make sure that we continuously are systematically streamlining the business so that anytime something comes up.

549

01:11:36.450 --> 01:11:41.010

Gabe Nelson: Like I have a meeting every single Monday with my two staff people and.

550

01:11:41.880 --> 01:11:55.170

Gabe Nelson: Basically it's like here's a bottleneck and seeing this happen let's fix this, how can we put a process in place to make sure that this doesn't happen like docuSign, for example, how many people pass docuSign questions, the first time you send them the form.

551

01:11:56.220 --> 01:12:06.210

Gabe Nelson: Maybe 60% 40%, we have to go back and fix well there's a cell phone system that you can actually change it to cell phone, so we updated that process today like.

552

01:12:06.750 --> 01:12:12.870

Gabe Nelson: doesn't matter, make sure that you put the cell phone piece, so we are constantly streamlining so that's why that's always checked in mind.

553

01:12:14.490 --> 01:12:15.510

Gabe Nelson: All it doesn't carry on.

554

01:12:16.020 --> 01:12:21.450

Stephanie Bogan: I can tell you, as a client docuSign on the cell phone is the best thing.

555

01:12:23.070 --> 01:12:28.020

Stephanie Bogan: Literally you get an email I got a sign ding ding done Thank you so much, love it.

556

01:12:33.510 --> 01:12:34.530

Don Hilario, CFP®: Always hard to follow them.

557

01:12:36.240 --> 01:12:36.930

Don Hilario, CFP®: With me.

558

01:12:37.320 --> 01:12:39.840

Don Hilario, CFP®: I thought of it like a Doc i'm older than you i've earned this.



559

01:12:40.080 --> 01:12:41.160

Don Hilario, CFP?: season season.

560

01:12:45.030 --> 01:12:53.610

Don Hilario, CFP?: So you know when a doctor comes right they like spend I don't know seconds, maybe minutes, looking at the diagnostic and then giving you a recommendation right.

561

01:12:53.940 --> 01:13:00.570

Don Hilario, CFP?: So for me it's always like gave constantly refining my process I would do these custom agendas using big words financial jargon.

562

01:13:01.500 --> 01:13:08.760

Don Hilario, CFP?: On the day of the meeting and make sense, but if I were to look back six months ago, a year ago it's like Hieroglyphics i'm like what the heck.

563

01:13:09.390 --> 01:13:14.460

Don Hilario, CFP?: And I mean Christian my words like what the F like that I right, if I can understand it, how about the climate in it.

564

01:13:14.790 --> 01:13:19.710

Don Hilario, CFP?: So that it forced me to say Okay, what can I do literally create a one page plan, where I can look at it.

565

01:13:19.950 --> 01:13:27.210

Don Hilario, CFP?: And just immediately get in the zone and say okay yeah, this is a client who already know how to do, I do insurance about the benefits blah blah blah done.

566

01:13:27.870 --> 01:13:38.010

Don Hilario, CFP?: And not just requires my process and they get really good and confident and how I work with my niche yeah so that's that's why I constantly check all those all those check marks.

567

01:13:38.580 --> 01:13:48.450

Stephanie Bogan: So your goal here is identify the things that are going to move the Needle for you what's next not right you're not going to check every box and every square over the next three years.

568

01:13:49.110 --> 01:13:56.370

Stephanie Bogan: You might have check marks after the fact, in terms of that constant refinement like I we look at productivity every quarter, we look at our model schedule, we look at our calendar and.

569

01:13:56.400 --> 01:14:01.530

Stephanie Bogan: You look at our workflows like hey do we need to make any tweaks right my calendar changes about every quarter.



570

01:14:01.950 --> 01:14:12.030

Stephanie Bogan: Because that's part of the process right, so our focus on productivity is a business system has allison right we just had the team this last quarter go back through.

571

01:14:12.420 --> 01:14:16.470

Stephanie Bogan: Right check email twice a day check a sauna we call it your daily in boxes.

572

01:14:17.130 --> 01:14:29.610

Stephanie Bogan: Like literally, what are your top six at the end of each day use your journals like your success shifters like going back through with everybody really fine tuning that because gravity always pulls things to the edges.

573

01:14:30.300 --> 01:14:39.240

Stephanie Bogan: Always in time, going back to the hot seat here we're going right time, is that thing that gravity most likes to pull away from us if we're not really discerning about how we use.

574

01:14:41.160 --> 01:14:47.520

Stephanie Bogan: All right, thank you guys for sharing that so now, I want to take a couple of minutes we're going to do a deeper dive on this, but I just want to introduce.

575

01:14:47.850 --> 01:14:57.060

Stephanie Bogan: This to you for those of you that are newer and remind and reintroduce this For those of you who are alumni, this is the practice benchmark analysis, so this is a tool.

576

01:14:57.930 --> 01:15:03.390

Stephanie Bogan: That basically takes all the data from your practice there's an input tab which makes it pretty straightforward.

577

01:15:03.750 --> 01:15:15.480

Stephanie Bogan: You put in the data and then it spits out for you, basically a benchmark comparison, so I had done and gave to them, for example, so you can see where those performance numbers came from.

578

01:15:15.990 --> 01:15:26.760

Stephanie Bogan: And you can see it breaks down what we called this kpis are the key performance indicators right the metrics like it's like the the right the dashboard on your car right what's your engine temperature what's your gas level, etc.

579

01:15:27.300 --> 01:15:33.840

Stephanie Bogan: And it really can highlight for you, where those inefficiencies where that tangled necklaces in.

580

01:15:34.260 --> 01:15:40.860



Stephanie Bogan: A practice right if we see that your revenue per client is below where it needs to be in terms of your goals that tells us that.

581

01:15:41.250 --> 01:15:47.580

Stephanie Bogan: Raising revenue per client is one of the levers that you need to pull, how do you raise right, how do you raise revenue per client.

582

01:15:48.480 --> 01:15:56.970

Stephanie Bogan: there's only a few ways right you raise the fees on clients, you have fewer clients with higher fees right you like that's that's kind of it.

583

01:15:57.330 --> 01:16:09.240

Stephanie Bogan: Okay, those are my two options now you are in a clear position to make discerning decisions, whether you do or not is up to you, but the data will not lie will tell you the story, it will give you the feedback that you need.

584

01:16:09.900 --> 01:16:21.930

Stephanie Bogan: So the idea is you go in you input your data and there is a one hour natalie recorded, I think a full hour like how to use the tool, how to go through it, so that if you want that deep dive yes, that is, on the website.

585

01:16:23.580 --> 01:16:34.500

Stephanie Bogan: And it's a pretty comprehensive tool, so what it will do is it will give you the benchmark, you can put in your goals it'll evaluate where you are relative to your whole and relative to your three year goal.

586

01:16:36.090 --> 01:16:42.090

Stephanie Bogan: And then I do have to tell you I was looking at it this morning, I think we need to update the benchmark numbers I don't think we've done it this year, so you might be.

587

01:16:42.120 --> 01:16:48.390

Stephanie Bogan: Over performing because we've had a couple of years of market performance but it's still a really good indicator and it hasn't changed that much.

588

01:16:49.050 --> 01:16:59.820

Stephanie Bogan: I will take a look at that and let you guys know, but what I want you to do is you can start to see the trends here, and then it gives you an indicator of where you are relative to the benchmark.

589

01:17:00.330 --> 01:17:06.840

Stephanie Bogan: You guys know I like to keep things simple green yellow or red, so you know total revenue to goal Joe Do I need to be worried about that.

590

01:17:08.370 --> 01:17:12.930

Stephanie Bogan: No it's green right like we're on track, where do I know in an instant I need to be looking.



591

01:17:14.280 --> 01:17:24.000

Stephanie Bogan: Right my expense per client right, obviously I should have some indirect expenses wow my operating profit now, this is a tricky one it's red it's actually a good thing.

592

01:17:26.310 --> 01:17:30.750

Stephanie Bogan: Alright it's backwards yeah when I click I can keep thinking it's a spreadsheet I can actually click into.

593

01:17:31.650 --> 01:17:39.300

Stephanie Bogan: Just with me I love excel but not in PowerPoint So the idea is you can go through, and then, as you can start to see down here, it will.

594

01:17:39.810 --> 01:17:43.860

Stephanie Bogan: You can't see great in this example, I can see, I think i'm in PowerPoint it can scroll.

595

01:17:44.760 --> 01:17:50.280

Stephanie Bogan: It basically tells you how your expenses break down what's direct in terms of right cost of goods and advisor COMP.

596

01:17:50.730 --> 01:17:56.040

Stephanie Bogan: Where your indirect your staff and overhead and then what's your profit and then it allows you to track that over time.

597

01:17:56.370 --> 01:18:05.310

Stephanie Bogan: there's also a fee profitability tool there's the simple see the client light profitability tool, so that anyone can do a simple version there's a more complex version.

598

01:18:05.880 --> 01:18:14.130

Stephanie Bogan: That allows you we've talked about it a few times to put in things like fee changes and model, what will happen to your revenue, if you do that.

599

01:18:14.550 --> 01:18:19.920

Stephanie Bogan: So when you do the bit jason's cremonese when you when you do this.

600

01:18:20.370 --> 01:18:30.510

Stephanie Bogan: it's a good idea if this doesn't give you, you know glowing green marks across the board to run to that client profitability and fee analysis and see what you would need to do.

601

01:18:30.960 --> 01:18:44.160

Stephanie Bogan: Man, you want to talk about like wow if I just raised, my fees 20% and transition the bottom 20% of my clients I would be 60% of the way to my goal wow without any new clients holy moly that might be something I want to tackle.



602

01:18:44.610 --> 01:18:52.500

Stephanie Bogan: So this is my literally one of my favorite tools in private client and coaching work, because it gives me all the data I need to surface the stories.

603

01:18:52.890 --> 01:19:05.580

Stephanie Bogan: about where a business is struggling suffocating stress points and what we need to surface strategy wise to make the changes that will move the Needle, and when I say move the Needle, this is what I mean on the dashboard.

604

01:19:06.540 --> 01:19:13.650

Stephanie Bogan: Right The goal is to go from red to yellow to green from not done to in progress to rate kicking butt taking names got the value of my business.

605

01:19:14.250 --> 01:19:19.860

Stephanie Bogan: So really encourage you all to do this, we will have a follow up call tribe talk around it.

606

01:19:20.250 --> 01:19:29.340

Stephanie Bogan: So we can talk through right how you know the modeling and how it works, but also to talk through some of your rate, if you have anything on your benchmark you want to talk about that will be the place to come.

607

01:19:30.210 --> 01:19:36.630

Stephanie Bogan: Right, do you how do you guys feel about this, I see a couple of comments in the chat he's excited about this anybody.

608

01:19:37.770 --> 01:19:45.510

Stephanie Bogan: Thank you, Joe see JASMINE I got it yeah, so this is a great tool for any of you data geeks like me i'm a closet data geek I love all of it.

609

01:19:46.560 --> 01:19:53.160

Stephanie Bogan: yeah yeah the world will not increase yeah the nice thing about the profitability tool, the fetal that Sydney was talking about in the chat is.

610

01:19:53.460 --> 01:20:00.600

Stephanie Bogan: It allows you to model like if I lose those clients it's what I call the break even if you raise your fees 20% i'm just picking a number at random.

611

01:20:01.140 --> 01:20:03.990

Stephanie Bogan: How many clients, can you lose and still breakeven.

612

01:20:04.980 --> 01:20:14.220



Stephanie Bogan: And when you know that right, if you know the number 17 it makes it a lot easier because the odds are overwhelming you're not going to lose 17 clients knock on wood it's never happened.

613

01:20:14.790 --> 01:20:22.170

Stephanie Bogan: Right, I think three is the most i'm not saying it couldn't be more but three is literally the high bar on clients lost in 27 years.

614

01:20:22.590 --> 01:20:39.780

Stephanie Bogan: So you want to be thoughtful you want to be intentional, you want to do all the things we talked about in terms of writing fair and communicating and all that, but I want you to know your job here is to engage in a way that removes your ability to make excuses.

615

01:20:41.100 --> 01:20:50.460

Stephanie Bogan: So any level at which you're not engaging I know some of you weren't trying people there's coaching happening there right this isn't like a hey Bob and New York that I don't know.

616

01:20:50.970 --> 01:20:57.000

Stephanie Bogan: there's right the tribe talks there's the coaching calls obviously retreats when we can get them in person, my point there is.

617

01:20:57.630 --> 01:21:17.250

Stephanie Bogan: Is that not engaging barring a family situation you're not going to love this, but it is the moment of coaching truth any say any way that you are not engaging is some form of excuse, it is your situations your stories your state's way of saying this is the status quo and I stay here.

618

01:21:18.480 --> 01:21:24.870

Stephanie Bogan: Because anytime that you have made a committed belief based decision with conviction, you have gone out and done it.

619

01:21:26.430 --> 01:21:34.410

Stephanie Bogan: So if you're not engaged i'm not saying, you are right again that the survey results were stellar and MPs scores were really, really good, which I feel great about but.

620

01:21:35.310 --> 01:21:39.750

Stephanie Bogan: i'm not going to sit on my laurels because we have kicked butt NPs scores, I still know.

621

01:21:40.170 --> 01:21:47.100

Stephanie Bogan: That there is that opportunity for you to create a little bit more clarity little bit more focus pull a little bit more data.

622

01:21:47.580 --> 01:21:57.330

Stephanie Bogan: To get really clear on what are the one or two things that you can do to truly right put fuel in your rocket for the second half of this year and get your blast off.



623

01:21:57.900 --> 01:22:07.470

Stephanie Bogan: Not that you're going to double your average client overnight, but you should actually know that you're on a path that, over the course of two or three years, you can have those same kinds of results.

624

01:22:08.010 --> 01:22:18.120

Stephanie Bogan: They are utterly available to you if you were willing to do the work the mindset, the methods, the mapping in the momentum, this is huge for mapping momentum, because it tells you.

625

01:22:18.540 --> 01:22:21.060

Stephanie Bogan: Where your problems are so that you can put them in your plan.

626

01:22:21.450 --> 01:22:31.080

Stephanie Bogan: And it gives you the momentum, because if you are looking at your dashboard every quarter, which is what I highly recommend, especially for those of you with teams and larger firms you can't get off track.

627

01:22:31.950 --> 01:22:38.400

Stephanie Bogan: If your goal is to double your revenue per client and you take one client below your current average what happens Cindy.

628

01:22:39.630 --> 01:22:41.100

Stephanie Bogan: What happens to my revenue per client.

629

01:22:41.970 --> 01:22:42.930

Sidney Divine: It goes up.

630

01:22:43.410 --> 01:22:51.630

Stephanie Bogan: Right, well, it will go down right if my if my current average is five and I raised it to eight, and I take a client that's for my revenue per client just went down.

631

01:22:51.960 --> 01:22:53.580

Sidney Divine: Oh, you said, if you let them go.

632

01:22:53.730 --> 01:22:58.590

Stephanie Bogan: yeah yeah and the reverse right in the exit and if I take in the reverse if I take a small client.

633

01:22:59.010 --> 01:23:07.260

Stephanie Bogan: That i'm not in the place to add the best value to and I let them go my revenue per client actually goes up so it's a better yardstick than pure annual revenue.

634



01:23:08.070 --> 01:23:18.690

Stephanie Bogan: Right that's why we look at that's why we look at those other data points so that you can start to see you know what my revenue hasn't grown by my ebook has who cares about revenue if you're a box growing the box what you take home.

635

01:23:20.040 --> 01:23:26.610

Stephanie Bogan: So this is a practical tool that I wanted to bring to the philosophy of mindset and momentum to give you.

636

01:23:27.000 --> 01:23:33.060

Stephanie Bogan: A reminder that this is here, we will again have a tribe talk to go deeper there's a recording and walk through it in great detail.

637

01:23:33.960 --> 01:23:44.670

Stephanie Bogan: But I want you guys, to know that right all the the nuts and the bolts, and the nitty gritty and the you know the blood muscle and sweat and all that stuff you got to do it, these tools are here for you, so I want to make sure that you are leveraging them.

638

01:23:46.380 --> 01:23:59.190

Stephanie Bogan: Alright, so I would highly encourage you all to do that if you run it For those of you in lifestyle we're going to do a check in mid year a little bit deeper on lifestyle so run it send it to me, and we can talk about it next one's calling me get to the hot seats.

639

01:24:00.660 --> 01:24:11.670

Stephanie Bogan: All right, speaking of high seas, was that was the benchmark reminder I know we did it at the beginning of the year, but I like to recycle thing, because I know that's one of 50 things we've talked about and mid year is a really good point.

640

01:24:12.330 --> 01:24:19.080

Stephanie Bogan: If you're smaller or you've just got a lot, and you don't want you know twice a year is a really good model right halfway through the year, am I on track.

641

01:24:19.350 --> 01:24:25.680

Stephanie Bogan: And my focus on the things that are moving the needle in the right direction, if not, you have raised in their half of the year to course correct.

642

01:24:26.100 --> 01:24:33.390

Stephanie Bogan: And really be looking at marketing for the balance of this year, next year, as you look at your growth strategies all right, Patrick Henry are you there.

643

01:24:34.170 --> 01:24:37.230

Stephanie Bogan: Yes, i'm going to talk about email twice a day.

644



01:24:38.130 --> 01:24:49.920

Patrick H.: Yes, please, and thank you again and i'm sorry to hear about JASMINE I just had the same thing, three weeks ago in terms of the wrist and same thing for someone at the beginning of the call they feel better as well yeah.

645

01:24:51.480 --> 01:24:55.500

Patrick H.: And also because I mean if we get this chance again i'll try to look here taking a cue from.

646

01:24:56.430 --> 01:25:01.140

Patrick H.: One of the lessons we had a few weeks ago I don't do a zoom often for work.

647

01:25:02.340 --> 01:25:07.830

Patrick H.: I had an outburst I think about six months ago, and one of our big goals and i'm sure Someone needs to be very quickly.

648

01:25:08.070 --> 01:25:13.650

Patrick H.: And if so, and i'm pretty sure that was the case that someone mentioned to me, I just want to say, I am sorry for that I was at a.

649

01:25:14.010 --> 01:25:23.400

Patrick H.: decidedly below the line place at that time, so if there was me and i'm sure it was just want to say sorry to anyone who was on that call six months ago, where they are about so sorry about that.

650

01:25:23.940 --> 01:25:24.450

Remember.

651

01:25:25.740 --> 01:25:27.300

Patrick H.: Now it's nice here to say.

652

01:25:29.010 --> 01:25:41.550

Patrick H.: So yeah the two times a day looking at email striving so last year was my first year on with la CP i've heard it a lot.

653

01:25:42.150 --> 01:25:48.270

Patrick H.: How email can can be a major challenge to doing our effective work and, in addition to that.

654

01:25:48.930 --> 01:25:54.990

Patrick H.: I want to reduce email to reduce my hours or at least a more consistent with a certain target of hours per week.

655

01:25:55.770 --> 01:26:04.380



Patrick H.: And, with your help, stephanie and everyone else here i've heard a lot of good messages on this, I am getting better, but I am finding that.

656

01:26:04.890 --> 01:26:13.440

Patrick H.: i'm sure there's at least one or two people that can relate to this i'm finding that it is extremely habitual it's everything you interact with stephanie it's like the little dopamine hits.

657

01:26:14.700 --> 01:26:25.710

Patrick H.: I have since because of you are some of your comments i'm in the last few weeks i've actually taken even my gmail APP sell on my phone but it's a way, so I can't see it it's tucked away and like that an APP folder.

658

01:26:26.220 --> 01:26:32.670

Patrick H.: And that has actually freed up my personal life in a way that I could be with my daughters and be more present with my daughters, a lot more.

659

01:26:33.210 --> 01:26:36.030

Patrick H.: So, the reason I bring it up to be on the hot seat is.

660

01:26:36.510 --> 01:26:47.460

Patrick H.: I am doing much better, I am making progress, but I have an extremely long way to go, there are some days that have hit twice a day Max, which is a friggin miracle a modern miracle because of you.

661

01:26:47.880 --> 01:26:51.990

Patrick H.: And there are some days, where i'm just checking it work emails that is i'm just checking it.

662

01:26:52.170 --> 01:26:56.280

Stephanie Bogan: what's the difference between a day that you stay on track and a day that you don't.

663

01:26:58.950 --> 01:27:10.050

Patrick H.: yeah the positive reinforcement is there when I am only doing two or even three i'm able to be in flow like that guy or whatever his name is Michelle check I can never say that guy's name godless.

664

01:27:11.310 --> 01:27:18.510

Patrick H.: I truly inflow I feel like i'm President of service, I meant to say it is good i'm in a good way.

665

01:27:18.720 --> 01:27:20.760

Stephanie Bogan: We make sure what puts you in flow.

666

01:27:22.800 --> 01:27:26.700

Patrick H.: Being able to be present and not be an interrupt every 57 seconds.



667

01:27:27.330 --> 01:27:28.830

Stephanie Bogan: what's what's interrupting you.

668

01:27:28.890 --> 01:27:33.090

Stephanie Bogan: Like what's physically coming into your office tapping you on the head and saying stop what you're doing.

669

01:27:35.130 --> 01:27:49.980

Patrick H.: So I work with one of the wire house is our quote unquote CRM lack thereof, whatever you want to say it's all Microsoft outlook, so I have the Microsoft outlook running all day which are learning to change right now but that's what's happening, I get the notifications.

670

01:27:51.420 --> 01:27:59.040

Stephanie Bogan: Right, so we can do a lot around this but i'm going to take you through just once a mindset stuff and to some method stuff to see if we can't start to change the habit.

671

01:27:59.340 --> 01:28:06.660

Stephanie Bogan: Sometimes we make a change it comes pretty effortlessly right Okay, like, for whatever reason, we were in the right time and place it wasn't super deep.

672

01:28:07.050 --> 01:28:14.520

Stephanie Bogan: Other things are harder Patrick when you get up in the morning, do you put your feet on the floor in the same spot go to the bathroom the same time, in the same way, every single day.

673

01:28:15.150 --> 01:28:28.890

Stephanie Bogan: yep yes, because that's the conditioned habit now there's a thing called I call it a condition set, which is what are the, what are the conditions in which you're operating and what are the resources available to you right do you have an assistant.

674

01:28:30.120 --> 01:28:31.110

Patrick H.: Yes, we have to.

675

01:28:31.440 --> 01:28:41.700

Stephanie Bogan: Okay right, so we know that you have a person who can help with email right so value is an important variable and the conditions that if you don't have someone helping you with email, which many of you don't.

676

01:28:42.270 --> 01:28:54.870

Stephanie Bogan: you're going to want to do all the same stuff except you're just going to want to block time to be your admin and time to be you because they're different roles, so the problem with email in general is one it's a constant distraction.

677



01:28:55.560 --> 01:29:05.580

Stephanie Bogan: So I want you to think about this is just a mindset shift, but I want you all to think about tech is a tool and a good tool like my pair of scissors will sit on this desk until I call them.

678

01:29:06.480 --> 01:29:14.250

Stephanie Bogan: And then they will serve me in exactly the way that I want, and then I will put them down and they will leave me, because they will not be beckoning me in any way, shape or form.

679

01:29:15.000 --> 01:29:25.800

Stephanie Bogan: tech is not a tool like this tech is a tool like sugar is to your brain, there are people who make a lot of money, they are designed to keep you in it right they understand how the brain works understand biochemistry.

680

01:29:26.100 --> 01:29:38.700

Stephanie Bogan: dope I mean when we check email we get something out of it but we're also what we're brain is not paying attention to is what we're giving up in exchange for that you don't get to feel that good for free.

681

01:29:40.260 --> 01:29:47.250

Stephanie Bogan: Right so we've got to ask ourselves is does it feel so good when we're done that it's worth it, and the answer is no, because every time we're like when my day.

682

01:29:48.180 --> 01:29:57.120

Stephanie Bogan: So what we need to understand is that there's a basic human right trigger rate queue and trigger response you've all heard about it, many, many times, our job is to break the trigger.

683

01:29:57.870 --> 01:30:01.410

Stephanie Bogan: One mindset, we think that there's something in there.

684

01:30:02.280 --> 01:30:09.330

Stephanie Bogan: That you know we're know ones and they're looking for their next biggest client there and they're looking for the stressor right, because if we can hit it off with the past, so one.

685

01:30:09.660 --> 01:30:13.440

Stephanie Bogan: We need a system that gives our brain, the security of knowing.

686

01:30:14.160 --> 01:30:25.230

Stephanie Bogan: everything's okay if there's an emergency, the phone will ring ring will teach our clients that like there's an actual emergency where you need me in under eight hours, like to see it.

687

01:30:25.770 --> 01:30:30.660

Stephanie Bogan: pick up the phone and call me that way, we know it's urgent right people puter that really, really quickly.



688

01:30:31.500 --> 01:30:41.490

Stephanie Bogan: day of you know you've got an assistant So what should be happening at base level is I want you to give yourself some physical cues so that you can use the strategies.

689

01:30:41.790 --> 01:30:49.530

Stephanie Bogan: we've got to create some space between the habit and your new hit your new your new headspace for the new condition to form, so do you have post it.

690

01:30:50.910 --> 01:30:51.480

Patrick H.: Too many.

691

01:30:51.540 --> 01:30:52.590

Stephanie Bogan: But I think you have.

692

01:30:52.620 --> 01:30:57.540

Stephanie Bogan: To post it please you can all do this with Patrick grab to post it.

693

01:31:03.540 --> 01:31:07.980

Stephanie Bogan: On one post it right one, and on another there you go and and another post it right to.

694

01:31:09.390 --> 01:31:14.340

Stephanie Bogan: put those on your monitor at the beginning of each day that's how many times you get to check email.

695

01:31:16.140 --> 01:31:25.890

Stephanie Bogan: The physical queue of having a post it on your monitor when you go to check it you're like oh it's one of my two times Do I really want to use it that way.

696

01:31:27.300 --> 01:31:36.360

Stephanie Bogan: Right so that's the commitment i'm only going to check twice today i've got to post its on my desk or on my monitor eat because all it's doing all we're doing is creating a pause.

697

01:31:36.990 --> 01:31:47.790

Stephanie Bogan: Between the queue I have a second my brain is going to habitually go to email because that's where the dopamine hit is in the middle of my stressful day and I would like some please write whiskey at one o'clock is frowned upon.

698

01:31:48.240 --> 01:31:56.130

Stephanie Bogan: So i'll go to my email to deal with my stress right that's my escape it's my little place of happy, or at least you know containment.



699

01:31:56.550 --> 01:32:07.770

Stephanie Bogan: We need to break that habit space micro actions just having to pick up the post it and take it off, so that you have a physical cue is a second or two.

700

01:32:08.430 --> 01:32:16.890

Stephanie Bogan: That makes you stop and say is this one of my two times and then you're back in that above the line conscious choice oriented state.

701

01:32:17.220 --> 01:32:24.960

Stephanie Bogan: hey I feel like I want to, but I remember that conversation with stephanie and the truth is, I really don't because I only have to post it's for the day that's my commitment.

702

01:32:25.560 --> 01:32:33.570

Stephanie Bogan: Now what's the accountability right for those of you in masterminds if you're not really kicking butt and taking names I promise you it's because you're not clear.

703

01:32:34.380 --> 01:32:43.470

Stephanie Bogan: you're not transparent, what you need to do and you're not holding each other accountable Patrick what are you willing to commit to to own your time and break that happen.

704

01:32:44.820 --> 01:32:47.790

Patrick H.: I stuffy do you mean giving myself consequences.

705

01:32:48.210 --> 01:32:55.410

Stephanie Bogan: Like pick a reward or a consequence that will really and I don't mean like any like when when I mean like Do you really want to own your time and do you mean it.

706

01:32:56.760 --> 01:33:08.460

Patrick H.: I do there's massive fear there that POPs in and says i'm going to be a conservative slovenly advisor my clients are going to think i'm asleep at the wheel, I have those thoughts that sometimes penetrate.

707

01:33:08.940 --> 01:33:19.410

Patrick H.: and make me check I should say make me but promptly to check it but i'm i'm willing to put guardrails in there and get myself punishment, if you will, or.

708

01:33:20.160 --> 01:33:31.020

Stephanie Bogan: Negative we're not we're not going to talk about punishment, we weren't talking about in terms of consequence, because everything we do as a consequence, if I eat a brownie there's a consequence of a piece of broccoli there's a consequence.

709

01:33:31.290 --> 01:33:40.200

Stephanie Bogan: punishment has a negative connotation, all I want you to do, Patrick is start to reframe the



consequences consciously.

710

01:33:41.220 --> 01:33:58.950

Stephanie Bogan: right if someone walked up to me with a bag of French Fries and an actual pound of fat and said, can I slap that on your backside when you eat the French Fries i'd be like, no, no, you may not right, but i've had to work off many of those pounds after the fact.

711

01:33:59.970 --> 01:34:08.580

Stephanie Bogan: Because we're not in that moment, conscious about the choice of what we're putting in our mouth, because the stressors and the stories in the state in the background noise say.

712

01:34:09.000 --> 01:34:18.210

Stephanie Bogan: eat the cookie have the cocktail it's worth a CIG like do whatever we do, whatever the condition habit it so what you're all trying to do in one way, shape or form literally.

713

01:34:18.570 --> 01:34:28.650

Stephanie Bogan: Is break habits, whether it's email or rate getting uncomfortable having tough conversations with your staff or communicating with your classroom feast you're just have it hacking.

714

01:34:29.580 --> 01:34:39.480

Stephanie Bogan: So one understand that when that fear kicks in it's because your brain has some story in the back of your mind that says bad things are going to happen, I better go find them before they come.

715

01:34:40.050 --> 01:34:48.900

Stephanie Bogan: Because we are hard wired our caveman brain is hardwired to survey the landscape for risk that's what email, is it is literally rewarding you to be afraid.

716

01:34:51.570 --> 01:34:57.630

Stephanie Bogan: Now that's a perfect model for keeping people stuck in email it's really bad model for having a better life experience.

717

01:34:58.800 --> 01:35:13.350

Stephanie Bogan: So one who's going to own your time, as you move forward like that's a conscious choice that I want you to sit within your body take a deep breath and consciously choose and if you're not ready say i'm not ready.

718

01:35:15.990 --> 01:35:18.510

Stephanie Bogan: And if you are ready, say i'm ready to on my time.

719

01:35:21.300 --> 01:35:31.980

Stephanie Bogan: Okay, so what is the consequence so when you right, I want you to just have something to weigh the dopamine hit again straight, the French Fries come with fat what's the fat.

720



01:35:33.750 --> 01:35:44.280

Stephanie Bogan: Or it can be a good consequence right, it can be i've been wanting to, and when I do this every day for 30 days i'm going to buy myself or go do like whatever find one that's motivating to you like really motivated.

721

01:35:44.880 --> 01:35:49.500

Stephanie Bogan: Because you're going to need that to overcome willpower because it's never there when you need it it'll last three days.

722

01:35:53.910 --> 01:35:58.950

Stephanie Bogan: So do you want to be a positive consequence or a negative consequence what's more motivated to you right now.

723

01:36:00.930 --> 01:36:03.720

Patrick H.: i'm at a complete loss, and I can, I think about it journal.

724

01:36:04.230 --> 01:36:09.510

Stephanie Bogan: nope you cannot, because that is the excuse zone so friends on the line you're all with me.

725

01:36:09.510 --> 01:36:12.600

Stephanie Bogan: and Patrick does anybody have any good ideas, where is this pod.

726

01:36:13.290 --> 01:36:22.830

Stephanie Bogan: Come on, ladies and gentlemen, help Patrick come up with something that will hold him accountable and you're welcome to share it if you want to join him in the note email challenge, I will say no i'll say you know twice a day.

727

01:36:24.360 --> 01:36:25.770

Stephanie Bogan: positive consequences.

728

01:36:29.100 --> 01:36:31.860

Stephanie Bogan: what's something you want to do with something that you like a.

729

01:36:33.870 --> 01:36:35.760

Patrick H.: lot of things I like I can't do at the moment.

730

01:36:36.060 --> 01:36:36.570

Patrick H.: All right.

731

01:36:36.870 --> 01:36:42.690

Patrick H.: I love music got enough to be treated myself to music instead of working my crazy that could be an option,



I don't know.

732

01:36:43.470 --> 01:36:48.750

Stephanie Bogan: All right, so you guys see what patrick's brain is doing right now literally cannot pick a consequence.

733

01:36:51.360 --> 01:37:00.720

Stephanie Bogan: Now, does that make any logical sense that we simply cannot pick a consequence good or bad, no, it makes no sense whatsoever So what does that tell you is happening in patrick's brain right now.

734

01:37:01.350 --> 01:37:06.720

Stephanie Bogan: live on the spot he's being really brave right, because now i'm doing this and talking about it, while he's like oh God I gotta supposed to come up with something.

735

01:37:07.140 --> 01:37:22.500

Stephanie Bogan: Now his brains definitely a shutdown which is that's The excuse them that's a strategy I don't know I learned this one from ELISE I don't know is a strategy it's a cop out because your brains like I can't be I can't I can't figure this out right now.

736

01:37:23.790 --> 01:37:38.310

Stephanie Bogan: Of course you can Patrick you can say I will pay you \$100 I will drink, you know something I really hate, I will donate \$100 to my least favorite politician, I will buy tickets to a concert that i've wanted to go to since I was you know 18 years old.

737

01:37:40.260 --> 01:37:47.910

Stephanie Bogan: So what that tells me is that motivation set like that that resistance is still that you may see that feel that you notice it.

738

01:37:49.110 --> 01:38:05.250

Stephanie Bogan: you've all experienced that you are some of you are still experiencing, that every day that's the lie that's the my brain is really holding on to this and it's so uncomfortable it just is like I can't think about this right now so we're just going to pick something.

739

01:38:06.600 --> 01:38:07.050

Stephanie Bogan: anything.

740

01:38:08.190 --> 01:38:09.180

Stephanie Bogan: Because your favorite band.

741

01:38:10.560 --> 01:38:13.380

Patrick H.: I just saw two great ones one positive one.

742



01:38:15.090 --> 01:38:21.900

Patrick H.: and gave mentioned, you know take my doors on experience, if I can do it when I stick to it and that's.

743

01:38:23.700 --> 01:38:29.310

Patrick H.: Something i'd never heard in my life that's that's a that's a doozy donate money to this picture.

744

01:38:30.570 --> 01:38:34.440

Stephanie Bogan: Oh yeah I can get I can give you some I can give you some quality candidates, if you want to.

745

01:38:35.550 --> 01:38:42.510

Stephanie Bogan: Make sure you definitely don't send the money that beautiful i've used that when a couple times right, you must wear a Yankees Jersey to fenway I love that.

746

01:38:42.810 --> 01:38:46.860

Patrick H.: haha and you'll have for water these got to be.

747

01:38:47.580 --> 01:38:57.870

Stephanie Bogan: yeah see but that's the point notice the energy there is fun or it's lighter it's Ford focus notice just a difference and Patrick state in.

748

01:38:57.870 --> 01:39:00.840

Stephanie Bogan: The 60 seconds that we came up with some specific ideas.

749

01:39:01.950 --> 01:39:12.600

Stephanie Bogan: That was the unstuck just that little bit now he's in his own where he can right now, he can think about it so pick one, you will shave half your left eyebrow off i'm down with that to.

750

01:39:13.680 --> 01:39:13.860

Patrick H.: Be.

751

01:39:16.410 --> 01:39:17.340

Patrick H.: very intense.

752

01:39:19.500 --> 01:39:22.350

Stephanie Bogan: it's why it's called the hottie so I called the lukewarm see.

753

01:39:23.610 --> 01:39:24.960

Stephanie Bogan: No one's ever gonna do it again.

754

01:39:26.700 --> 01:39:33.120



Patrick H.: I guess, for now, to start i'll stick to the i'll throw hundred bucks some organization l.

755

01:39:34.170 --> 01:39:34.800

Patrick H.: don't like.

756

01:39:35.160 --> 01:39:36.360

Stephanie Bogan: Okay let's get one.

757

01:39:37.380 --> 01:39:38.340

Patrick H.: I don't even know.

758

01:39:38.520 --> 01:39:42.750

Stephanie Bogan: ya see that but that's the COP out your brain won't you just there's no there's nothing to commit to.

759

01:39:46.440 --> 01:39:50.340

Stephanie Bogan: who's your least favorite politician, I doubt you're going to offend anyone here.

760

01:39:54.300 --> 01:39:58.350

Patrick H.: that's a tough one, because I wouldn't be a fan of some of the current policies of.

761

01:39:58.590 --> 01:39:59.730

Patrick H.: The current President, but.

762

01:39:59.820 --> 01:40:06.390

Patrick H.: I don't despise him as a person, I could care less as a person God bless intuition, the best, but I wouldn't abide by politics.

763

01:40:06.630 --> 01:40:10.770

Stephanie Bogan: Are you are you like, are you a vegetarian or a God like just pick some.

764

01:40:11.160 --> 01:40:12.750

Stephanie Bogan: Who do you not want to send money do.

765

01:40:16.410 --> 01:40:19.260

Patrick H.: Alright, so don said something there i'm from New York.

766

01:40:19.320 --> 01:40:22.800

Patrick H.: yeah I could send something to the Boston red SOx got blessing.



767

01:40:23.970 --> 01:40:24.330

Stephanie Bogan: All right.

768

01:40:24.660 --> 01:40:28.470

Patrick H.: So I despise them but I guess that's something that I certainly wouldn't put on your.

769

01:40:28.770 --> 01:40:33.870

Stephanie Bogan: mindset, you could just write a check straight to the happily take your money right.

770

01:40:34.230 --> 01:40:38.220

Patrick H.: Good tricky one and I'm like as I guess it up get it back in a way it's like.

771

01:40:38.280 --> 01:40:40.560

Stephanie Bogan: nope no bacon for a month, so do you see.

772

01:40:40.770 --> 01:40:43.620

Stephanie Bogan: This is the kind of stuff I want you guys doing in your masterminds.

773

01:40:44.580 --> 01:40:51.390

Stephanie Bogan: it's a no excuse own if you were not holding each other to this level of commitment, well, it might be great like that's the up level.

774

01:40:52.980 --> 01:41:00.630

Stephanie Bogan: And what I just did right like that's pretty straightforward like while you're hedging their we don't hedge around here we pick something we write it on a piece of paper and we go for it.

775

01:41:01.440 --> 01:41:15.000

Patrick H.: I'll send a bagel because there's my organization, but I don't dislike game, I like cake, but yes, I will send you 100 if I don't if I look more than twice is that per day or is that any day I look more than twice stephanie.

776

01:41:16.080 --> 01:41:21.450

Stephanie Bogan: You posted pick one you can do three I don't care just pick something you can commit to is three better.

777

01:41:22.950 --> 01:41:30.330

Patrick H.: awesome how about not a cop out I'll start with three a day I go over three Gable send your hundred dollars, and that is not easy for me.

778

01:41:30.630 --> 01:41:31.140

Stephanie Bogan: There you go.



779

01:41:31.950 --> 01:41:32.580

Patrick H.: No, thank you.

780

01:41:32.640 --> 01:41:37.860

Stephanie Bogan: On game on so let's add that to the accountability room allison mixtape.

781

01:41:39.150 --> 01:41:47.880

Stephanie Bogan: yeah so Dave will take all the money that you sent him buy tickets to the game, he wants to go to and send you pictures of the Jersey, that you bought him.

782

01:41:49.620 --> 01:41:50.010

Stephanie Bogan: All right.

783

01:41:50.520 --> 01:41:51.510

Stephanie Bogan: Now, Patrick.

784

01:41:52.140 --> 01:41:56.520

Stephanie Bogan: Are you clear on why you have been checking email twice a day.

785

01:41:59.010 --> 01:42:01.830

Patrick H.: Am I clear on why the time the successful times.

786

01:42:01.920 --> 01:42:07.710

Stephanie Bogan: know just up to this point, like I why I should frame that correctly, are you clear why you are where you want to be with email.

787

01:42:08.880 --> 01:42:09.840

Patrick H.: fairly clear yeah.

788

01:42:10.620 --> 01:42:13.770

Stephanie Bogan: Are you clear on what you've committed to with respect to email.

789

01:42:14.370 --> 01:42:14.880

Patrick H.: Yes.

790

01:42:14.940 --> 01:42:24.660

Stephanie Bogan: I said now what changes are you going to make to enforce that to reinforce that one you're going to give yourself a physical Q posted on your desk.



791

01:42:25.470 --> 01:42:32.070

Stephanie Bogan: To you're going to walk out to your daughters and say to them hey Daddy made a commitment today that's going to help him be more.

792

01:42:32.550 --> 01:42:43.530

Stephanie Bogan: With you when he's home and every time I don't do this, I have to send \$100 to a guy who is going to wear a Jersey, that I don't like, and I promise you those girls will hold your feet, to the fire way more than gave well.

793

01:42:44.670 --> 01:42:53.400

Stephanie Bogan: Right so you'd be like I mean they're going to take you guys to the game with the money and bias jerseys are ominous engaged to a game to a game with jerseys and i'm pretty much baton on me, what do you girls think.

794

01:42:54.270 --> 01:43:00.210

Stephanie Bogan: Right, so you want to get like because they're right success is when everyone around you is that the way you're doing that.

795

01:43:00.780 --> 01:43:11.370

Stephanie Bogan: And then you see if you're using your success shifter or your habits journal honestly a physical Q, is so important, those micro actions of having to check the box every day.

796

01:43:11.670 --> 01:43:19.050

Stephanie Bogan: or check it off in the habits journal are really big to read wiring your brain, which is what you're doing.

797

01:43:19.320 --> 01:43:29.430

Stephanie Bogan: So the habit that you have how you get up your feet on the floor pick up your phone and go to the bathroom is a neural pathway in your brain it comes with a set of chemical instructions and you don't even have to think about it and.

798

01:43:30.240 --> 01:43:39.600

Stephanie Bogan: that's what email is it's the default distraction distraction, if there was like a distraction mode like in the spy movies really pushed the button that's what email would be.

799

01:43:40.230 --> 01:43:51.570

Stephanie Bogan: it's the default distraction mode, you should be in there when you have time presence and intention, so if you have staff right have them check your email have it today folder.

800

01:43:52.920 --> 01:43:56.190

Stephanie Bogan: right that says here's the stuff that Patrick needs to deal with today.

801



01:43:57.330 --> 01:44:05.970

Stephanie Bogan: You can look at my email policy different people have different ones, but you basically want to build a system where either it goes to a client service email so they're filtering most of the email.

802

01:44:06.450 --> 01:44:13.890

Stephanie Bogan: Or it goes to yours integrating cases and then they're screening your email, and then you have a folder that tells you what to pay attention to today.

803

01:44:14.670 --> 01:44:20.580

Stephanie Bogan: And then you can build whatever workflow system, you want around that we can always do it we'll talk about that managing people in priorities but.

804

01:44:21.000 --> 01:44:26.640

Stephanie Bogan: So you want to make sure that you have your staff in place right your people you want your process.

805

01:44:27.120 --> 01:44:30.960

Stephanie Bogan: I'm going to check it I'm going to go to this folder I'm going to do it for X amount of time.

806

01:44:31.320 --> 01:44:37.860

Stephanie Bogan: And you're working on things you're not processing them right everything in the folder should already have been processed that's why it's left for you.

807

01:44:38.520 --> 01:44:46.980

Stephanie Bogan: You want your success shifter or your Journal on the back into your day right the post it's on the front end get your clarity and focus here's the outcome, I want to create.

808

01:44:47.400 --> 01:44:59.280

Stephanie Bogan: The journaling and the tracking and the back end of the day, gives you that backstop right did we show up in that way and that pattern loop, day after day, literally every time you go to check email but don't.

809

01:45:00.630 --> 01:45:08.400

Stephanie Bogan: You are stopping the neuro chemistry of that pathway, and it will, over the course of about 21 to 30 days wither and die.

810

01:45:08.880 --> 01:45:19.140

Stephanie Bogan: And if you focus on the new behavior every time you go no that's not going to serve me I check email three times a day because that's how right I'm conscious about cloning my time.

811

01:45:19.530 --> 01:45:30.120

Stephanie Bogan: Every time you do that, you are literally laying new chemistry new neural pathway, so that, over the course of time, the old one drops off dies, and the new one becomes the new, stronger muscle.



812

01:45:30.450 --> 01:45:39.660

Stephanie Bogan: that's essentially what you're doing you can do that with any habit a micro action i've had some of you get up in journal for five minutes a day.

813

01:45:40.890 --> 01:45:48.870

Stephanie Bogan: literally just to just to own five minutes your time I don't care what you journal about literally it's about saying I can carve out five minutes, where I.

814

01:45:49.320 --> 01:46:01.860

Stephanie Bogan: consciously choose to carve out space once you create that micro habit you're out of default mode and you're back into driver mode, which means you can get yourself above the line declare a good focus and get to work.

815

01:46:03.360 --> 01:46:04.530

Stephanie Bogan: Right does that help you.

816

01:46:05.340 --> 01:46:09.030

Stephanie Bogan: tremendously right are you clear on what you want to do, and why you want to do it.

817

01:46:09.660 --> 01:46:14.730

Stephanie Bogan: Yes, all right you're focused on what you need to do to actually make the change.

818

01:46:16.050 --> 01:46:20.040

Stephanie Bogan: Right, you said, accountability and you're going to get to work, yes.

819

01:46:20.160 --> 01:46:21.570

Patrick H.: Thank you stephanie Thank you everyone.

820

01:46:21.930 --> 01:46:24.330

Stephanie Bogan: Oh, my pleasure you guys Thank you guys for participating.

821

01:46:25.140 --> 01:46:26.370

Stephanie Bogan: that's the power of community.

822

01:46:26.490 --> 01:46:33.630

Stephanie Bogan: Now all of you have have something like that that you're stuck around most of you well, we all have something me included.

823

01:46:34.320 --> 01:46:40.710

Stephanie Bogan: Our job is to have that level of awareness so that as things in our life aren't working and aren't



feeling good.

824

01:46:41.070 --> 01:46:54.090

Stephanie Bogan: We have the power to pause get present and say, am I working on purpose, am I working at a pace of progress that feels good to me and am I producing the results in my business and life.

825

01:46:54.420 --> 01:46:58.110

Stephanie Bogan: That are moving me in the direction of my goals and if I am.

826

01:46:58.560 --> 01:47:06.450

Stephanie Bogan: That is a good day and I can check the box get up tomorrow do it again and know that in two or three years i'm going to be on the screen.

827

01:47:06.720 --> 01:47:20.310

Stephanie Bogan: Like Adam and tanya and then engage and on all of the other examples, because when you work, the plan, the plan will work, which is what I unretire to share with all of you and i'm going to end right now, because I think it makes me on time.

828

01:47:22.170 --> 01:47:23.010

Stephanie Bogan: That I do in the meantime.

829

01:47:24.000 --> 01:47:24.930

Limitless Adviser: six minutes over.

830

01:47:25.770 --> 01:47:29.100

Stephanie Bogan: See, I can see my clock I got this big clock but it doesn't have a timer.

831

01:47:29.190 --> 01:47:29.520

Stephanie Bogan: alright.

832

01:47:29.550 --> 01:47:32.280

Stephanie Bogan: We answer your questions, all right all right.

833

01:47:32.880 --> 01:47:40.740

Stephanie Bogan: Christopher his PA pod an email Patrick to make sure that you're accountable see I love that how they just jumped right in and hold your feet, to the fire For those of you.

834

01:47:41.040 --> 01:47:48.540

Stephanie Bogan: Who are in pods who are not at that level of clarity kicked butt and accountability, I have just given you some Monday mojo.



835

01:47:48.990 --> 01:47:56.130

Stephanie Bogan: expect you to hold each other to that level of challenge coaching and commitment in your next mastermind call.

836

01:47:56.730 --> 01:48:03.450

Stephanie Bogan: Anything less is a cost of compromise because that's what you came here to do, ladies and gentlemen, and I.

837

01:48:03.810 --> 01:48:10.410

Stephanie Bogan: am here to remind you that life is now in session there are no do overs and my job is to help you make the most of it with that.

838

01:48:10.650 --> 01:48:22.920

Stephanie Bogan: Thank you all for today, I hope, today's call was valuable and helpful and gave you what you need to get clear get focused and keep getting to work, Patrick I expect an update and our next call June 28 man.

839

01:48:23.820 --> 01:48:26.340

Stephanie Bogan: You are on the you're on the radar now.

840

01:48:26.940 --> 01:48:27.450

Patrick H.: Thank you.

841

01:48:27.660 --> 01:48:28.410

Stephanie Bogan: Thank you very much.

842

01:48:28.890 --> 01:48:36.000

Stephanie Bogan: Everyone else was this helpful to you today in terms of just kind of recalibrating resetting principles practice proven stuff.

843

01:48:36.330 --> 01:48:49.320

Stephanie Bogan: You guys have everything that you need get clear what is the one thing that you're going to move the Needle, on between now and our next call keep focused and if you get stuck in the work you know where to find this with that you guys have a great day.

