

# LIMITLESS Coaching Call Transcript

JULY 26<sup>TH</sup>, 2021  
MAKEOVER DAY  
LIMITLESS COACHING CALL

104

00:18:25.470 --> 00:18:28.740

Stephanie Bogan: All right, how is everybody today, Brian freaky how are you.

105

00:18:30.660 --> 00:18:39.300

Stephanie Bogan: How thumbs up alright Steve how are you today, I see right there your office blue shirt okay pat you moving forward on the brand.

106

00:18:41.010 --> 00:18:47.970

Stephanie Bogan: Right, I had Leona send you some notes about some other fitness oriented planners to check out so that should be coming to you if you haven't gotten it yet.

107

00:18:48.780 --> 00:18:56.040

Stephanie Bogan: Alright, everybody today is our limitless coaching call lifestyle in particular and i'm going to call this makeover day.

108

00:18:56.910 --> 00:19:14.610

Stephanie Bogan: So the whole point of makeover day is to really take a pause as we're just sort of past the the pivot point or the halfway point of the year we're now almost a month through the second half of the year and i'm going to ask you all really important question.

109

00:19:16.140 --> 00:19:19.650

Stephanie Bogan: But first and want you to find something on your desk that's light.

110

00:19:20.760 --> 00:19:21.120

Stephanie Bogan: want.

111

00:19:24.270 --> 00:19:32.460

Stephanie Bogan: So find something on your desk that's light i'm going to find just a pair of glasses, I want you to hold them hold them out some somehow like this hold him up.

112

00:19:34.650 --> 00:19:38.130

Stephanie Bogan: i'm watching you too, so I want to see everyone doing it i'm going to scroll through screen here.

113



00:19:39.450 --> 00:19:43.680

Stephanie Bogan: Already married josh Scott you're hiding behind your camera can't see you, but everyone else.

114

00:19:44.730 --> 00:19:47.820

Stephanie Bogan: Okay, so I just want you to hold on to that for just a SEC okay.

115

00:19:49.740 --> 00:19:58.020

Stephanie Bogan: Right so let's talk a little bit about makeover today i've got coach tiffany here with me who's done some radical makeovers in her business and personal life so she's gonna.

116

00:19:58.410 --> 00:20:05.670

Stephanie Bogan: Help navigate sort of how the process has worked for her and be sort of a guide through this process with you today, because, as I shared.

117

00:20:06.300 --> 00:20:17.220

Stephanie Bogan: Today is makeover day and part of makeover day is really asking yourself what was the breakthrough that they came for now you're still holding your thing Scott Sullivan, I don't see you holding your thing.

118

00:20:17.700 --> 00:20:23.910

Stephanie Bogan: And this is no joke said yes and he's like oh gotta put it up and here's a you got to hold it up, but you can't like hold yourself up, I just want.

119

00:20:23.910 --> 00:20:24.570

Stephanie Bogan: You to hold it up.

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00:20:24.900 --> 00:20:29.430

Stephanie Bogan: can't be on a desk like you have to be holding just this little thing not a big deal right.

121

00:20:30.270 --> 00:20:40.200

Stephanie Bogan: keep going so it's time for a breakthrough, so I was going back through some things on tribe, and I noticed this picture which I just love, because it always makes me feel so good, when I see it.

122

00:20:40.950 --> 00:20:53.310

Stephanie Bogan: Because I know all these faces and I know their stories and I know what their life was like, on the other side and I realized that as we go through our summer sprint that I would love for each of you, as you are out traveling and roaming.

123

00:20:54.330 --> 00:21:00.360

Stephanie Bogan: To find a place that you really enjoy something that you're doing that is part of your limitless life and snap a picture yourself.

124



00:21:00.750 --> 00:21:14.820

Stephanie Bogan: With your I am a limitless advisor sign, so please feel free will put that in the inbox insight, but we will do a collage and we will have it in September retreat, so I would love to know where you are being limitless over the course of your summer.

125

00:21:15.990 --> 00:21:20.910

Stephanie Bogan: All right, are you still holding your weights Aaron are you holding your thing Okay, is it getting heavier.

126

00:21:22.710 --> 00:21:29.160

Stephanie Bogan: it's getting a little heavier right but it's still just a little thing you got this right you're strong, you can endure you've got willpower and patience all sorts of other stuff.

127

00:21:29.820 --> 00:21:40.080

Stephanie Bogan: So as you're having your summer, please do this is a really fun thing it's really fun for me and we're going to w right the class of 2021 and do a really cool thing, so you want your picture to be in it.

128

00:21:40.620 --> 00:21:47.580

Stephanie Bogan: So make sure that you send that off to us the other thing that I wanted to talk to you about while you're holding on to those little things.

129

00:21:48.000 --> 00:22:00.810

Stephanie Bogan: Is the accountability room so as we work on our summer sprint remember those big one, the big personal and we're professional thing that you really want to attack this summer, even if attacking it means taking time.

130

00:22:01.260 --> 00:22:12.060

Stephanie Bogan: So we pulled some of the snapshots from the accountability room Liz hand I don't get a scroll through to see if you're here, if you are pop on, and let me know how it's going.

131

00:22:13.230 --> 00:22:17.460

Stephanie Bogan: Andrew palumbo are you here he'll take me forever to scroll but.

132

00:22:20.370 --> 00:22:20.820

Liz Hand, CFP?: i'm here to.

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00:22:21.300 --> 00:22:25.410

Stephanie Bogan: hey all right Liz so let's do a quick check in How are things going.

134

00:22:27.540 --> 00:22:35.850

Liz Hand, CFP?: i've been practicing my script from what i'm referencing there, which is not being able to talk about myself i've got my six points.



135

00:22:38.550 --> 00:22:43.590

Liz Hand, CFP?: i've tried to go through it once formally and then I failed to do it once at a networking event.

136

00:22:45.540 --> 00:22:47.040

Stephanie Bogan: All right, and your next step is.

137

00:22:51.390 --> 00:22:52.380

Liz Hand, CFP?: Keep practicing.

138

00:22:53.640 --> 00:22:58.500

Liz Hand, CFP?: and bring it to my awareness, the next time i'm around somebody that I could possibly say it to okay.

139

00:22:59.250 --> 00:23:04.530

Stephanie Bogan: All right, and so do you find that the momentum is changing at all there in terms of how it feels.

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00:23:06.660 --> 00:23:14.760

Liz Hand, CFP?: You know I would say so, at least have some some tangible things to say that kind of roll off my tongue, a little bit better.

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00:23:16.530 --> 00:23:18.030

Liz Hand, CFP?: Not for comfort there so.

142

00:23:19.140 --> 00:23:24.810

Stephanie Bogan: Are you one, two or 5% forward from where you started, which was saying nothing.

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00:23:25.890 --> 00:23:29.250

Stephanie Bogan: I think great choking is not the outcome that we're looking for so.

144

00:23:29.340 --> 00:23:29.790

Stephanie Bogan: Great.

145

00:23:30.000 --> 00:23:31.470

Stephanie Bogan: Have you mom okay.

146

00:23:32.160 --> 00:23:33.330

Liz Hand, CFP?: Yes, I have moved away from.

147

00:23:33.390 --> 00:23:37.080



Stephanie Bogan: Okay, so everybody give Liz a huge high five because.

148

00:23:37.140 --> 00:23:50.070

Stephanie Bogan: You all know how that feels and it's not that fun when you have this incredible message, and you know you're good, and when you go to tell someone like some voice in your head says you're not worthy don't do it and you shrink back.

149

00:23:50.970 --> 00:23:59.670

Stephanie Bogan: And what we learn when we take these little steps Michael you're still holding your pen no get lazy killed it up it's supposed to be getting heavy at this point i'm making a point here so don't cheat.

150

00:24:01.170 --> 00:24:16.050

Stephanie Bogan: Right it's these little things you guys are in the business of what like one of the things that you do in investments is tell people, the story of compounding interest this breakthroughs from the other screen right oh this happy faces.

151

00:24:17.280 --> 00:24:23.940

Stephanie Bogan: You know, yes, there were a full giant band aid REPS but, for the most part, it was those incremental moves it's these little things.

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00:24:24.480 --> 00:24:31.470

Stephanie Bogan: That we do every day and because Liz moved off of choking her brain learns she didn't die.

153

00:24:32.220 --> 00:24:47.280

Stephanie Bogan: Which means the next time the resistance goes from 100% to 95% and then the next time it goes from 95 to 90 and sooner than she realizes it it's rolling offered time, like her middle name and she's moving on to whatever her next resistance point is.

154

00:24:48.510 --> 00:24:54.870

Stephanie Bogan: So the point here is, I want you to think about what you're holding on to still.

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00:24:57.570 --> 00:25:13.620

Stephanie Bogan: Because little thing like i'm you know I haven't had that conversation with my staff member i'm still checking my email haven't really nailed the surges or the model schedule, or I haven't just taken that next step on my brand those little things compound every single day.

156

00:25:15.000 --> 00:25:24.060

Stephanie Bogan: And, like all forms of energy, when you get critical mass, what happens here's the kicker energy is universal it's Switzerland.

157

00:25:24.600 --> 00:25:37.530

Stephanie Bogan: Like it gives you back what you give it so if you're focused in a positive forward focused way that's where your energy is going to go and if you're looking at your feet and you're spinning and you're dealing with all



those little things you're not setting them down.

158

00:25:38.790 --> 00:25:47.280

Stephanie Bogan: Then you're going to stay where you are so sometimes the little things are little things there's things we have to move off of our desk and we're procrastinating.

159

00:25:47.610 --> 00:25:58.260

Stephanie Bogan: And sometimes the little things are the decisions that we make, are we don't make are the choices that we do or don't make on a daily basis that ultimately, if we're not careful, become the big things.

160

00:26:00.510 --> 00:26:11.940

Stephanie Bogan: So I'm going to ask Kent to check in on his accountability room, but when I want to ask all of you to think about first you can put your pens or pencils were for friendship is very I love your little timer verge you held it up the whole time.

161

00:26:14.460 --> 00:26:21.480

Stephanie Bogan: When they want you to think about is what have you been holding on to right, what was the breakthrough that you came for is how we started.

162

00:26:23.220 --> 00:26:29.880

Stephanie Bogan: And, according to all of your responses and your feedback you're making incredible progress, like a super positive year as a group.

163

00:26:31.140 --> 00:26:41.160

Stephanie Bogan: And I still know what's possible for you, not in terms of doing more, but in terms of those are has the breakthroughs that are going to get you that hockey stick effect.

164

00:26:42.480 --> 00:26:52.260

Stephanie Bogan: Right, whatever that next level is you get that jump in, then you get the win and the momentum and you're starting you really should at this point, starting to see that and I know that you are.

165

00:26:52.620 --> 00:27:04.620

Stephanie Bogan: So ask yourself what have you been holding on to is it you know discomfort with changing a staff member is that you know being bored by sitting down or process what what is it that you're holding on to.

166

00:27:05.520 --> 00:27:18.780

Stephanie Bogan: That you could choose to set down that would lighten your load just a little bit and let you reapply that energy in a way that would move you forward so you think about that and I'm going to check in with can't where all the checking in Kent.

167

00:27:18.840 --> 00:27:20.550

Limitless Adviser: and Andrew here to stephanie.



168

00:27:20.730 --> 00:27:22.860

Stephanie Bogan: Oh great, how is the schedule going.

169

00:27:23.760 --> 00:27:24.870

Kent Hickey: it's going awesome.

170

00:27:26.250 --> 00:27:31.170

Kent Hickey: i'm in week three now and one of the weeks as well, or is that for free.

171

00:27:32.820 --> 00:27:40.830

Kent Hickey: But this week is really busy from a client, there are a lot of clients that kind of came up over the weekend that need advice.

172

00:27:42.330 --> 00:28:00.390

Kent Hickey: So i'm fitting them into my my schedule and previously, I would have just been like whenever they wanted to talk, I would have been making myself available and putting everything else aside, but now i'm managing the process much better and.

173

00:28:02.070 --> 00:28:06.450

Kent Hickey: The thing I keep going back to is i'm checking my email twice a day.

174

00:28:07.980 --> 00:28:09.480

Kent Hickey: which for me.

175

00:28:10.740 --> 00:28:18.780

Kent Hickey: is like it's it's so free to be able to like know that I don't need to be on the email all day long.

176

00:28:20.070 --> 00:28:25.710

Kent Hickey: And it's definitely back a lot more focus time where I can actually do meaningful things.

177

00:28:26.580 --> 00:28:33.630

Stephanie Bogan: And that's the combination of pulling back on email because email is this I call it impulse and react.

178

00:28:34.440 --> 00:28:46.920

Stephanie Bogan: We get bored we're shifting gears our brains natural reaction is give me some sugar food that's called dopamine if we're sugar on your desk, but if you don't have that right, and where do we get that quick and easy every time or phone or email.

179

00:28:48.060 --> 00:28:56.730

Stephanie Bogan: And so we are literally addicted to those little so it's about just retraining our brain and when you



have when you don't have something to turn to.

180

00:28:57.300 --> 00:29:07.740

Stephanie Bogan: This is for everyone it's hard to stick to a habit that's why models are so valuable rights why societies have models and processes or models and time has models.

181

00:29:08.220 --> 00:29:15.510

Stephanie Bogan: Is the way that we've learned to take agency which is can't what you're really starting to get back and these little moves is.

182

00:29:15.930 --> 00:29:23.310

Stephanie Bogan: A bad if I asked him how he feels now that he has more agency over his time like look he just smiled when I talked about it.

183

00:29:23.760 --> 00:29:34.890

Stephanie Bogan: And he's just getting started right he's learning to exercise the discipline muscle of it's not an I have to it's an impulse to check email, because when we get there we're just constantly reacting.

184

00:29:35.550 --> 00:29:45.630

Stephanie Bogan: Right and so when you have a place the model schedule, then you then your brain has a path Okay, I know where they're going I don't have to service them right now, because.

185

00:29:46.050 --> 00:29:54.480

Stephanie Bogan: I can get to this on Tuesday that's my time for service i'll be prepared and organized on that idea sounds really good the client didn't pass out nobody died.

186

00:29:54.960 --> 00:29:58.590

Stephanie Bogan: And then it literally six months from now it's going to be boring and routine.

187

00:29:59.550 --> 00:30:08.910

Stephanie Bogan: Truly and that's what you want, you want the routine to be boring and routine because you don't think about getting up and checking your phone or going to the bathroom or getting in the car you just do them.

188

00:30:09.420 --> 00:30:21.900

Stephanie Bogan: And that's what you want the routine to be, because when we do that all of our energy gets to be applied to whatever we're giving our attention to and then it's on us to choose wisely what we spend our energy on alright so you're making good progress.

189

00:30:22.830 --> 00:30:28.800

Stephanie Bogan: Yes, excellent excellent alright, and so next step is keep following the process okay.

190



00:30:29.040 --> 00:30:40.260

Stephanie Bogan: Excellent all right any other anyone you guys can drop in the chat anyone else experiencing some shifts and focus and energy as they pull out of email and search US model schedule more.

191

00:30:42.420 --> 00:30:46.440

Stephanie Bogan: I know i've seen some wins on tribe in that so i'd love to hear yes Liz.

192

00:30:48.450 --> 00:31:00.660

Stephanie Bogan: Alright, so we're making progress here alright Andrews here Andrew how are you doing what's your check in business goals fishing trips I love fishing my son's into fishing.

193

00:31:03.690 --> 00:31:04.140

Andrew: Can you hear me.

194

00:31:04.500 --> 00:31:10.470

Andrew: I can i'm actually getting a tattoo right now, so your timing is pretty awesome.

195

00:31:10.890 --> 00:31:11.700

Stephanie Bogan: Are you serious.

196

00:31:13.140 --> 00:31:13.770

Andrew: hundred percent.

197

00:31:14.070 --> 00:31:17.190

Stephanie Bogan: You should be on why we don't get that on the screen is what you're saying.

198

00:31:18.960 --> 00:31:20.460

Stephanie Bogan: Is it a limitless tattoo.

199

00:31:20.550 --> 00:31:21.840

Stephanie Bogan: Is that too much to ask.

200

00:31:23.370 --> 00:31:28.590

Andrew: I didn't think of that this is a part two of a tattoo I started a month ago.

201

00:31:28.950 --> 00:31:36.420

Andrew: awesome you'd love to tattoo artist she's by appointment only and only does work that she wants, so I think she went to your class.

202

00:31:36.660 --> 00:31:41.550



Stephanie Bogan: I love it all right well you know what like right like attracts like.

203

00:31:41.610 --> 00:31:54.480

Stephanie Bogan: Right well um I don't want to interrupt the the the very important session, but if you want to give us a quick check in on how your analysis and segmentation and and move, how are you moving forward in terms of accountability.

204

00:31:55.950 --> 00:32:02.730

Andrew: That almost done before I came here, it was just working on that with my wife who's kind of running that whole project so.

205

00:32:03.300 --> 00:32:16.950

Andrew: I should be I can get that to you this afternoon, for your review or to see if we did it correctly, but I think it's all an awesome tool, by the way, just incredible incredible tool my wife like somebody paid a lot of money for this.

206

00:32:19.590 --> 00:32:24.450

Andrew: So that's going well everything's just going as it should.

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00:32:27.000 --> 00:32:35.520

Stephanie Bogan: that's great I want you guys to know, I did not cherry pick people who were all executing I didn't even pick these allison just.

208

00:32:37.200 --> 00:32:39.960

Stephanie Bogan: So I would absolutely as a coach is.

209

00:32:40.080 --> 00:32:40.530

Stephanie Bogan: working.

210

00:32:41.310 --> 00:32:51.570

Stephanie Bogan: and holding yourself clear imprints on your brain, this is what i'm supposed to do so that even when you're not thinking about it it's great it's navigating you in that direction.

211

00:32:51.960 --> 00:32:59.850

Stephanie Bogan: And the more you reinforce that the better so that's why we talk about it that's why it's in the accountability room that's why, if you're in there you notice, I am in there.

212

00:33:00.300 --> 00:33:05.730

Stephanie Bogan: Checking in on you and saying hey I haven't heard from you what's going on here, because that tells your brain.

213

00:33:06.090 --> 00:33:10.200



Stephanie Bogan: That someone's paying attention and that we just gotta keep nudging that fall forward.

214

00:33:10.620 --> 00:33:17.160

Stephanie Bogan: So I want to invite all of you to set down, something which we're going to talk a little bit more about.

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00:33:17.550 --> 00:33:24.570

Stephanie Bogan: And I also want you to pick up something that you want to be accountable for and make sure that you have something in the accountability room on tribe.

216

00:33:25.110 --> 00:33:33.780

Stephanie Bogan: If you haven't gone in it's really easy you create a username there's room called accountability room in fact i'm going to take you guys sell we don't that.

217

00:33:34.350 --> 00:33:37.710

Stephanie Bogan: will make sure that you've got the information on that an inbox but.

218

00:33:38.610 --> 00:33:45.750

Stephanie Bogan: You guys take one second and drop i'm looking over here at the chat let's take one maybe 30 seconds or so and I want you to each if you have.

219

00:33:46.080 --> 00:33:57.390

Stephanie Bogan: Your big thing for the summer sprint type it in, and if you have yet to pick a thing, where you're working on something, and you just need to put that box and bow around it, so we can help you get clear and accountable.

220

00:33:57.840 --> 00:34:04.530

Stephanie Bogan: Go ahead and drop that in chat but i'd love to see them to make sure Tom is going to be raising fees and time management.

221

00:34:05.460 --> 00:34:16.590

Stephanie Bogan: Oh yes, by the way, Andrew I, you must send us a picture of the tattoo like that's not even optional and then, when he does allison will put it in inbox insight because that's the stuff that we do here.

222

00:34:17.400 --> 00:34:23.250

Stephanie Bogan: that's why I had to create my own community, because I wanted to be able to do stuff like that not everyone loves that stuff alright.

223

00:34:23.970 --> 00:34:34.890

Stephanie Bogan: Alright, going are a model schedule check email twice a day branding and website become a hubley power user that's a good one, implement model scheduled time management three big things love that Scott.

224



00:34:35.280 --> 00:34:43.290

Stephanie Bogan: gluten free nightshade know social media love that Liz implement holly check email twice a day Kathy niche equity calm Gary good.

225

00:34:43.800 --> 00:34:58.770

Stephanie Bogan: are a transition and 67 days, Melissa awesome all right does everybody have something launching team brand Michael personal brand add Cindy those are always fun Clinton CFP study every day I love that man that's your job.

226

00:34:59.340 --> 00:35:05.340

Stephanie Bogan: process Michelle is getting ready for fall search type take time off in August Jill that is like one of my favorite things I love it.

227

00:35:05.850 --> 00:35:18.630

Stephanie Bogan: All right, so everybody should have something if you don't have something you need to let me know because it means that there you're stuck somewhere and we need to unstuck you, but I think you guys have great momentum this year and we're in a good place so.

228

00:35:20.220 --> 00:35:38.730

Stephanie Bogan: let's talk about the hot seat so i've got tiffany on the call with me today and this coaching call is going to be a coaching call, so I wanted to check in with you on where you are in your breakthrough, I wanted to talk to you about what are you holding on to.

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00:35:39.990 --> 00:35:48.090

Stephanie Bogan: And then tiffany and I are going to spend the rest of today's call answering your any questions that you have and basically talking with you about how to change your momentum.

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00:35:48.480 --> 00:35:55.440

Stephanie Bogan: As a team, so if you are I know some of you have most of you have some at least some support staff.

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00:35:55.860 --> 00:36:03.690

Stephanie Bogan: But we'll get to that if you have none, this is really going to be about your momentum and then creating space to bring that first person in for a couple of hours.

232

00:36:04.230 --> 00:36:10.200

Stephanie Bogan: But this is really applicable and we really wanted to follow up because I know a lot of you i'm going to be talking about managing people.

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00:36:10.440 --> 00:36:19.020

Stephanie Bogan: and priorities from an operational and organizational and a business leader perspective later in the agenda, and I know your help, very much looking forward to that.

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00:36:19.380 --> 00:36:28.380

Stephanie Bogan: But I also post the productivity retreat people are such an important part of your productivity, that we wanted to kind of bring the focus of our you and your team.

235

00:36:28.920 --> 00:36:38.040

Stephanie Bogan: it's like are you in the methods and the momentum and the mapping and like is everything working the way that it should are there places there that we can really reinforced the lessons around.

236

00:36:38.280 --> 00:36:48.450

Stephanie Bogan: How you create leverage with your people process and platforms so we're going to go through that but what I wanted to do is start with an invitation we're going to do a number of hot seats today.

237

00:36:50.250 --> 00:36:55.920

Stephanie Bogan: And i'm looking at my clock and it says 52 minutes and i'm pretty sure we haven't been talking for 52 minutes, but I just.

238

00:36:57.150 --> 00:37:09.750

Stephanie Bogan: In case I got really excited no I don't think i've got carried away all right, but now it says five minutes it's really funny i'm going to turn it off Okay, so I asked you all, what you're holding on to.

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00:37:11.310 --> 00:37:17.580

Stephanie Bogan: Some of you are holding on the little things, some of you are holding on to medium sized things and some of you are still holding on the big things and that's okay.

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00:37:17.850 --> 00:37:22.320

Stephanie Bogan: Right it's a process, not an event that's what growth and development is of us in our practice.

241

00:37:22.800 --> 00:37:33.000

Stephanie Bogan: So i'm going to be looking in the chat if you have an issue that you would like to talk with tiff and I through can a hot seat hot seat isn't a good good way obviously not in a bad way.

242

00:37:33.600 --> 00:37:38.310

Stephanie Bogan: drop something in the chat or actually allison do you want me to have them go to slide Oh, are you want me to do in the chat.

243

00:37:39.270 --> 00:37:40.200

Limitless Adviser: I think Chad is fine.

244

00:37:40.440 --> 00:37:41.190

Stephanie Bogan: Okay well to chat.

245



00:37:43.320 --> 00:37:47.640

Tiffany Charles: And we have Jay Miller, you said you're stuck.

246

00:37:47.940 --> 00:37:52.890

Stephanie Bogan: yep we want to yes so we're going to start we're going to start with Jay.

247

00:37:54.780 --> 00:38:00.960

Stephanie Bogan: All right, so if you have something go ahead and drop it in the chat and over the course of the next few minutes we'll our of our call we're.

248

00:38:00.960 --> 00:38:02.040

Stephanie Bogan: gonna be talking.

249

00:38:03.150 --> 00:38:05.490

Stephanie Bogan: Was weird my audio is really flipping out on me right now.

250

00:38:06.810 --> 00:38:07.200

Okay.

251

00:38:11.970 --> 00:38:13.290

Stephanie Bogan: All right, can you hear me okay now.

252

00:38:15.060 --> 00:38:19.590

Stephanie Bogan: All right, good okay so Jay Jay Miller, want to hit the hot seat.

253

00:38:22.380 --> 00:38:23.280

J Miller: Yes.

254

00:38:25.200 --> 00:38:26.550

Stephanie Bogan: Here you're in enthusiasm.

255

00:38:29.250 --> 00:38:29.850

Stephanie Bogan: All right.

256

00:38:31.350 --> 00:38:34.260

Stephanie Bogan: tell us a little bit about Where are you and how you are stuck.

257

00:38:39.480 --> 00:38:40.110

J Miller: So.



258

00:38:41.130 --> 00:38:45.570

J Miller: Our team is fortunate in several aspects.

259

00:38:47.100 --> 00:38:48.990

J Miller: We have 17 members.

260

00:38:50.430 --> 00:38:53.130

J Miller: We brought a new young gentleman on board.

261

00:38:54.570 --> 00:39:02.490

J Miller: About four years ago and we're just not seeing the development that we would like he's basically a junior FA.

262

00:39:03.510 --> 00:39:04.080

J Miller: and

263

00:39:05.160 --> 00:39:15.540

J Miller: You know we've we struggle with the concept in my team our pod talked about it on one day and really at the point that clearly does not.

264

00:39:17.100 --> 00:39:21.780

J Miller: The person doesn't have the hustle drive.

265

00:39:24.270 --> 00:39:32.850

J Miller: As one of the people actually I think michael's on the call here but setting our pop pop pop you know he's not a doesn't have the entrepreneur so or so.

266

00:39:34.230 --> 00:39:38.640

J Miller: And so now we're trying to figure out how to untangle that.

267

00:39:41.490 --> 00:39:51.810

J Miller: anytime that we're looking to possibly make a move to our a are independent, I should say in the next few months, so um.

268

00:39:53.670 --> 00:40:04.380

J Miller: You know our concern just becomes do we have enough staffing, to be able to do a good job in a transition without health hair.

269

00:40:06.660 --> 00:40:08.160



J Miller: And we we just just said, this is.

270

00:40:09.180 --> 00:40:16.830

J Miller: A tough the bailey's for us internally or are we just making excuses because it's easier there there you know letting him go ahead and.

271

00:40:20.310 --> 00:40:30.060

Stephanie Bogan: So on so I when I hear you saying so, I just want to make sure we're all on the same page is that you have a team of seven one of those in your FA that was hired for years ago.

272

00:40:30.660 --> 00:40:38.730

Stephanie Bogan: I presume to come in and provide leverage and if you're feeling like he's not the person and yet you're going independent in a few months, and so.

273

00:40:39.180 --> 00:40:53.340

Stephanie Bogan: The battle rages, you know, do we kind of tolerate through this to the other side, do we let this person go and sort of you know hire someone in the midst or after the transit, so I just want to make sure i'm framing is that sort of the question.

274

00:40:54.030 --> 00:40:55.170

Stephanie Bogan: sort of just.

275

00:40:55.740 --> 00:41:06.570

J Miller: You know, I know, one of the things when you make this type of transition in our book is you know roughly \$900 million so um.

276

00:41:07.530 --> 00:41:24.120

J Miller: You know, we have a good number of clients, and so I my personal concern as technically, the head of the the team, making this all happen is do I have enough hands on deck when we make the make the move to have reached out to.

277

00:41:25.380 --> 00:41:34.380

J Miller: clients in a manner that I would lightly, so that we don't leave people people buying just simply because we didn't have enough hands to get to everyone, like we would like.

278

00:41:35.040 --> 00:41:46.980

Stephanie Bogan: Of the team of seven If I could just ask clarifying questions and to feel free to jump in how many of those are advisors and how many of them are staff that will be managing that paperwork part of the process and how many clients are there.

279

00:41:49.020 --> 00:41:53.040

J Miller: To our staff fiber FA is once.



280

00:41:54.090 --> 00:42:02.430

J Miller: A senior Member who won't won't be part of the effort to make it happen he's he's just along for the ride he built the book.

281

00:42:04.050 --> 00:42:08.100

J Miller: Is at nine years old, so he won't help on that side of it but.

282

00:42:09.690 --> 00:42:15.870

J Miller: Roughly 680 household somewhere right in there okay.

283

00:42:17.130 --> 00:42:20.070

Stephanie Bogan: yeah your staffs going to be really, really, really busy.

284

00:42:21.120 --> 00:42:22.200

J Miller: Right yeah.

285

00:42:23.130 --> 00:42:35.640

Stephanie Bogan: Can I ask this question around the what was the junior have a hired to do and was he hired to provide support or was he hired to sell or is the hustle just around how he's showing up and doing the job.

286

00:42:36.810 --> 00:42:39.420

J Miller: He was hired for support.

287

00:42:41.340 --> 00:42:44.160

J Miller: And then he was oh OK.

288

00:42:46.290 --> 00:42:47.280

J Miller: And then.

289

00:42:49.410 --> 00:42:51.990

J Miller: I think that is really.

290

00:42:53.730 --> 00:42:59.220

J Miller: I think he really wants to be an FA and I think he has all the tools to be an FA.

291

00:43:03.120 --> 00:43:06.960

J Miller: But I just wonder, so I really actually wondered more, the question is.

292



00:43:08.250 --> 00:43:19.530

J Miller: Again, get him I doing a good job read read them, because I think that could be be the problem right does he have because he's he's a phenomenal person.

293

00:43:20.130 --> 00:43:35.790

J Miller: And he does excellent cleaning up in communicating with clients and I just was very if the the hunger part is something that i'm not doing a good job and helping him through her understanding.

294

00:43:38.790 --> 00:43:39.150

J Miller: Because he's.

295

00:43:39.270 --> 00:43:43.350

J Miller: got he's got the tools here's here's a guy he's pleasant.

296

00:43:44.010 --> 00:43:44.670

Stephanie Bogan: And when you say.

297

00:43:45.480 --> 00:43:47.040

Stephanie Bogan: That what is hunger mean to you.

298

00:43:50.310 --> 00:44:00.750

J Miller: The the want to get ahead, they come to come to me and say hey you know what can I do today to.

299

00:44:01.770 --> 00:44:05.190

J Miller: To get better, what can I do today to advance our team.

300

00:44:07.980 --> 00:44:09.750

J Miller: Because there's lots of opportunity.

301

00:44:13.140 --> 00:44:22.800

Stephanie Bogan: Does he have time to do that in the role that he's in he's got 680 clients and he's one of to support staff, my best guess is he might be a little bit busy on a daily basis.

302

00:44:23.400 --> 00:44:26.430

J Miller: Well he's not support staff now he's MFA now.

303

00:44:26.730 --> 00:44:31.080

J Miller: Okay, so we have to support staff and he's one of the five face.

304

00:44:31.290 --> 00:44:31.590



Okay.

305

00:44:33.960 --> 00:44:39.840

Stephanie Bogan: So, how does so i'm just trying to get clear, are you trying to decide if you should keep him as an advisor.

306

00:44:41.280 --> 00:44:43.110

Stephanie Bogan: Or you trying to decide if you should have.

307

00:44:43.440 --> 00:44:45.330

J Miller: Because you could have maybe it's not.

308

00:44:46.650 --> 00:44:57.510

J Miller: The role or how do you or how would you talk to him about hey Is this really the role you want to be, or were you more comfortable in the support and.

309

00:44:59.760 --> 00:45:11.190

Stephanie Bogan: This is where it's really important that we as as the ones, defining the roles are really clear on what the expectations and experience of those roles are so.

310

00:45:11.580 --> 00:45:18.840

Stephanie Bogan: We can talk about this at a at a cultural level with tiffany and I will talk to you guys in a minute i'll show you the next slide This is why this stuff really matters.

311

00:45:19.380 --> 00:45:29.580

Stephanie Bogan: Is when someone's individual momentum pay style culture isn't aligned with the firm that creates issues if their job is caught up if they're overwhelmed.

312

00:45:29.940 --> 00:45:38.790

Stephanie Bogan: If they're breaking down if they're not doing a good job, and then you you don't have a smooth ride when if every every person on the team is is spoken the wheel.

313

00:45:39.720 --> 00:45:47.640

Stephanie Bogan: And everything is running smoothly that's what we want, but if one person in that wheel, whether you have one person on your team or 10.

314

00:45:48.150 --> 00:46:00.810

Stephanie Bogan: Right and tiffany can speak to this right, like you, it creates a ripple effect throughout the entire organization so i'm going to actually turn this off because we don't stare at that I just realized i'm so.

315

00:46:02.130 --> 00:46:08.700



Stephanie Bogan: here's I think there's a I think there's probably a few things to unpack here here's devotees, not that I know there are a few things one.

316

00:46:09.120 --> 00:46:20.250

Stephanie Bogan: If I had to guess right and it were short cutting rates just a lot of questions, but if I had to guess when we put people in the chair we're like here's the Chair here's what we want you to do go forth and conquer.

317

00:46:20.670 --> 00:46:25.380

Stephanie Bogan: And then we have this tendency to sit on the other side of the line going hey you're not doing what I wanted.

318

00:46:25.890 --> 00:46:32.400

Stephanie Bogan: And, in general, if you think about that model of clarity, transparency and accountability, it is our responsibility.

319

00:46:32.760 --> 00:46:42.810

Stephanie Bogan: To make it clear what the role is what the expectations are, how you advance right what we do to support you what you have to do to support yourself.

320

00:46:43.260 --> 00:46:58.980

Stephanie Bogan: So there's that structurally hey you know what the Level one advisor is what's the job of that person like if someone is learn their job and they're trying to learn their client base like i'm going to back up here you've got the person.

321

00:47:00.090 --> 00:47:09.630

Stephanie Bogan: So, in general, what you're describing is if we eat here someone style right if you do pull the it's a quick start if you do this it's having a Heidi it's what I call being a mountain climber.

322

00:47:10.080 --> 00:47:17.370

Stephanie Bogan: there's those of us who just wake up and we're like Oh, what can we do got to make it better gotta go climb a mountain will go figure it out don't need directions, none of that.

323

00:47:17.880 --> 00:47:25.080

Stephanie Bogan: right sort of like a cow when well let's get some horse and runs off to California to see what's there there's no path there's no town there's no water you just figure it out.

324

00:47:25.980 --> 00:47:33.360

Stephanie Bogan: We tend to hire people we weren't like us, because we think that works, and then we get frustrated with them when they aren't like us.

325

00:47:33.900 --> 00:47:40.920

Stephanie Bogan: Now that's Okay, but what we ultimately have to decide in a firm when we're hiring advisors, is what kind of advisor we're hiring.



326

00:47:41.220 --> 00:47:48.210

Stephanie Bogan: And when you have a disconnect you will always have problems I have seen this literally hundreds of times so i'm going to explain this using cats.

327

00:47:49.080 --> 00:47:58.620

Stephanie Bogan: And it's going to be really clear to you and I have no way i'm trying to say that y'all are cats but it's going to make a point, there are two kinds of cats their house cats.

328

00:47:59.220 --> 00:48:10.080

Stephanie Bogan: And their alley cats and house cats are very comfortable they're wonderful they're delightful they're great to have around that relationship really works.

329

00:48:10.440 --> 00:48:20.070

Stephanie Bogan: But there's certain rules of that relationship like they don't go hunt for food, the food just arrives right so they're really good is sort of following the model.

330

00:48:20.460 --> 00:48:30.240

Stephanie Bogan: And they like to stay safe inside they're not going outside hunting for food they don't get super bored they're not like ooh I just want to go explore the neighborhood and getting by cody that that's a house cat.

331

00:48:31.140 --> 00:48:39.390

Stephanie Bogan: alley cats great whether they live indoors or not, you all know, the person I don't have cats, by the way, but alley cats right I call them hunter cats.

332

00:48:39.870 --> 00:48:46.890

Stephanie Bogan: Because they have to fend for themselves, they want to be outside they're chasing mice there in trash cans there they're just making their way through the world.

333

00:48:48.960 --> 00:48:53.520

Stephanie Bogan: You are naturally a hunter cat or an alley cat for the most person.

334

00:48:54.210 --> 00:49:09.270

Stephanie Bogan: i'm sorry i'm hunter cat or housecat service advisors or house cats, there is nothing wrong with being a service advisor, it is a fundamentally important role, and if you are the founder or partner in a firm, you should love these people.

335

00:49:09.690 --> 00:49:17.310

Stephanie Bogan: Because they are what let you go be 100 cat what you love to do, and if you had to sit in the House every day, you would put a pencil in your ear.

336

00:49:17.850 --> 00:49:23.850



Stephanie Bogan: So we have to get really clear on Is this a service advisor role.

337

00:49:24.540 --> 00:49:31.680

Stephanie Bogan: Is this a service advisor role that is part of a career ladder that allows that person to level up, based on their hustle and if they don't.

338

00:49:31.980 --> 00:49:42.870

Stephanie Bogan: Then guess what they stay a service advisor and then you build around them and that's the way that it works or you decide as a firm that you don't want to do that culturally or team wise and you make your adjustments.

339

00:49:43.530 --> 00:49:53.460

Stephanie Bogan: But what we tend to get busy We have lots of clients we hire advisors me throw clients that and we say good luck go forth and conquer and then we have lots of gaps in our expectations we get disappointed.

340

00:49:53.910 --> 00:50:04.170

Stephanie Bogan: And it's really about getting clear on what's really happening is the role, clearly defined not just take here the duties, you will meet with clients, you will implement.

341

00:50:04.620 --> 00:50:16.020

Stephanie Bogan: The great the Ross it's you know what is the role in this If so, is this a service advisor or sort of a producing or selling like is rainmaking a part of his role at this point.

342

00:50:21.360 --> 00:50:23.940

Stephanie Bogan: he's still there today, I think I scared away.

343

00:50:27.420 --> 00:50:28.950

J Miller: Somebody muted me so.

344

00:50:30.270 --> 00:50:31.110

Limitless Adviser: i'm muted him.

345

00:50:32.250 --> 00:50:32.940

Limitless Adviser: Back sorry.

346

00:50:36.210 --> 00:50:42.360

J Miller: i'm not in my office, but my cameras picking them my office so.

347

00:50:43.410 --> 00:50:44.640

J Miller: That doesn't help at all.



348

00:50:47.400 --> 00:50:48.210

Stephanie Bogan: So, would you.

349

00:50:49.350 --> 00:50:50.490

J Miller: may be going back.

350

00:50:50.490 --> 00:50:51.150

To.

351

00:50:53.430 --> 00:50:58.200

J Miller: Not having the the role defined enough for me to be able to even even answer that.

352

00:50:58.920 --> 00:50:59.820

Stephanie Bogan: stephanie can tell you.

353

00:51:00.330 --> 00:51:01.440

J Miller: Like you said we.

354

00:51:01.920 --> 00:51:07.620

J Miller: We took a bunch of accounts say hey don't make it happen and.

355

00:51:09.480 --> 00:51:13.200

J Miller: The when you when you said that I was like yeah that's that's that's pretty much what we did.

356

00:51:14.310 --> 00:51:15.870

Stephanie Bogan: yeah I didn't read this inbox I I know.

357

00:51:17.130 --> 00:51:22.770

Stephanie Bogan: i've been there unwinding I get it like I totally get out happens and that's okay.

358

00:51:23.700 --> 00:51:32.970

Stephanie Bogan: And we can do better by saying this is our opportunity we're about to go independent, so this is your ideal opportunity to sit down as a team.

359

00:51:33.540 --> 00:51:42.720

Stephanie Bogan: and say what's our structure, what are the roles of partners right is every partner managing a silo team right and their revenue and their team and their expenses run through that is.

360



00:51:42.900 --> 00:51:49.740

Stephanie Bogan: Do we have you know is every are we dividing duties, like a real firm like partner in charge of marketing activities for right partner in charge of planning.

361

00:51:50.250 --> 00:52:01.170

Stephanie Bogan: So that those things matter because it ultimately defines the role of everyone else in the organization, but in general you're going to have and there's all these resources are in the library around career letters.

362

00:52:01.590 --> 00:52:11.790

Stephanie Bogan: Right you're going to define the role it typically starts in this right your junior advisor is typically a service advisor to start they're moving up through plan service or coming out of school or career changing or whatever they're doing.

363

00:52:12.690 --> 00:52:21.030

Stephanie Bogan: And then that next level is where they hit a certain level of competency there's a training and an onboarding plan, then I strongly encourage you all to follow.

364

00:52:21.690 --> 00:52:31.410

Stephanie Bogan: And then that next level is they start to do some rainmaking and then, when they get to a certain level of rates revenue that they've generated, then they get that lead advisor.

365

00:52:32.520 --> 00:52:42.450

Stephanie Bogan: Presumably they get to a certain level they make partner right and you define that and then in your firm, you should ultimately be big enough to give people the chance to move up that career ladder.

366

00:52:42.960 --> 00:52:52.110

Stephanie Bogan: I can tell you just given the number of advisors and staff relative to the number of accounts, if you guys aren't super tech efficient if you guys those two staff, people are overwhelmed.

367

00:52:53.010 --> 00:53:01.440

Stephanie Bogan: Those two staff so it's either that they're crushed for the your advisors are doing a lot of service work which will lead to a conversation.

368

00:53:01.680 --> 00:53:02.250

Stephanie Bogan: value which.

369

00:53:02.550 --> 00:53:03.120

Stephanie Bogan: i'm not gonna.

370

00:53:03.240 --> 00:53:04.590

i'm not going to go off on today.



371

00:53:07.530 --> 00:53:17.400

Stephanie Bogan: So also profile your team right disc colby, whatever your preferences, I like just just because i'm so familiar with it called these very popular strength finders popular.

372

00:53:17.970 --> 00:53:29.370

Stephanie Bogan: You can find out very early on, because you're not going to stereotype but they're incredibly good at like tiffany's nodding nodding they're really good at picking I call it peeking under the hood.

373

00:53:30.660 --> 00:53:40.440

Stephanie Bogan: If someone is a house cat, no matter how much money you dangle of them, no matter how much you don't understand why they don't want to take advantage of the opportunity that is so obvious.

374

00:53:40.890 --> 00:53:48.660

Stephanie Bogan: it's because they're not they're literally not wired that way and there's nothing you're going to do in that motivation, however it's going to be so short lived.

375

00:53:49.140 --> 00:54:00.450

Stephanie Bogan: When we put people in their ideal roles that's you get that momentum that we were going to talk about is is making sure you've got the right people in the right seats that's the structure part J right, making sure that you're.

376

00:54:00.780 --> 00:54:09.270

Stephanie Bogan: Right what's our team, going to be structured like what are advisors going to do, should we be bringing in a pair of planner right one pair of planner could support or a virtual pair of planner could support.

377

00:54:09.600 --> 00:54:17.880

Stephanie Bogan: Five partners pull the planning work off and then you could have maybe a couple of staff managing the paperwork using on the limitless lessons around tech and systems and efficiency.

378

00:54:18.900 --> 00:54:19.560

Stephanie Bogan: Does that help.

379

00:54:23.670 --> 00:54:25.350

J Miller: Very much so thank you.

380

00:54:25.650 --> 00:54:37.530

Stephanie Bogan: So you have to redesign your organizational strategy, you have to build a partnership model, you need your advisor business model your advisor training program your service model so that those teams i'm not joking all know what to do.

381

00:54:37.980 --> 00:54:38.970

J Miller: know what to do.



382

00:54:39.510 --> 00:54:41.190

Stephanie Bogan: Like those are your next five things.

383

00:54:45.270 --> 00:54:48.240

Stephanie Bogan: You might want to evaluate you talk about the other things, but.

384

00:54:48.480 --> 00:54:53.790

Stephanie Bogan: it's like that path of life, but do being clear about the firm that we're designing as we move forward.

385

00:54:54.480 --> 00:54:57.840

J Miller: And this person fits into those five things for me.

386

00:54:58.170 --> 00:55:02.070

Stephanie Bogan: you're going you're going to want to like looking at your business strategy.

387

00:55:03.330 --> 00:55:07.590

Stephanie Bogan: right here, so you need to redesign re look at your organizational structure and strategy.

388

00:55:08.880 --> 00:55:21.750

Stephanie Bogan: Look at your partner model in particular your team model right, you have one financial planning department person that does it for everyone is every T is every advisor fending for themselves so hybrid model.

389

00:55:22.830 --> 00:55:25.740

Stephanie Bogan: Your advisor training and onboarding.

390

00:55:26.760 --> 00:55:29.280

Stephanie Bogan: And then there's what I call the advisor business model.

391

00:55:29.850 --> 00:55:41.940

Stephanie Bogan: Which is literally lays out what the firm does for advisors and what the advisors do for the firm right, you will participate in the investment meeting you want everything goes in the CRM, this is the service model you implement like literally everything it's pretty cool.

392

00:55:43.050 --> 00:55:52.590

Stephanie Bogan: Are you going to want your career ladders, for all your team, but especially for your advisors to fill in right so you're literally going to have your or your new org structure your partner model.

393

00:55:52.980 --> 00:55:59.730



Stephanie Bogan: The team model right which the team that we deliver planning through you're gonna have your staffing model, so that all shows up in your org chart.

394

00:56:00.390 --> 00:56:12.000

Stephanie Bogan: And then you're going to build your service model, so this is like one of those layers that I do with larger firms and private clients, those of you that are smaller won't use this in the same way, but it's about what centralized and decentralized.

395

00:56:14.520 --> 00:56:24.510

Stephanie Bogan: Right so decentralized is is happening at the team level right tiffany's teams are meeting with clients that's decentralized centralized is investments and compliance and in some firms financial planning.

396

00:56:25.410 --> 00:56:37.140

Stephanie Bogan: Right and, as far as get larger marketing becomes more centralized right so it's like the gravity either shifts out as you grow or the gravity shifts in as you grow depending on which leg of facet of the business that you're dealing with.

397

00:56:38.250 --> 00:56:48.600

Stephanie Bogan: So you'll need to define that team model for the best leverage so like I said it might be to keep it where advisors kind of do everything, and you just drop a lot of paperwork on to people.

398

00:56:49.170 --> 00:57:00.570

Stephanie Bogan: But that's a very top heavy model, so I probably recommend to change there and then the service model was the last piece because that's what tells everyone as a team consistently, this is what we need to deliver as a firm.

399

00:57:02.190 --> 00:57:06.030

Stephanie Bogan: And I could fill in lots of other stuff but those are four or five really big ones for you guys.

400

00:57:09.900 --> 00:57:10.050

J Miller: But.

401

00:57:11.190 --> 00:57:12.750

Stephanie Bogan: tiffany typed it that was great thanks.

402

00:57:13.290 --> 00:57:13.770

you're welcome.

403

00:57:14.790 --> 00:57:23.220

Stephanie Bogan: you're welcome alright, so this is what I mean by I use the phrase unpacking things is sometimes when we put off issues.

404



00:57:24.180 --> 00:57:32.970

Stephanie Bogan: especially here in this space, which is what you're here to address right when we put off these issues which I do with this FA like oh it's really not about the FA at all.

405

00:57:33.360 --> 00:57:37.590

Stephanie Bogan: it's about the fact that we don't have clarity, so we probably haven't given him clarity.

406

00:57:37.800 --> 00:57:44.850

Stephanie Bogan: Which means we whether he's doing a good job or not is moot in my mind at this point because you have to give people the benefit of the doubt until you show up and.

407

00:57:45.120 --> 00:57:51.870

Stephanie Bogan: and manage your side of the fence so tiffany can tell you I just had a whole meeting with her and a tire team, and I was like hey.

408

00:57:52.380 --> 00:57:59.070

Stephanie Bogan: We own everything and then with her and Jared I was like look we everybody gets the benefit of the doubt it's the reset button we hit zero.

409

00:57:59.490 --> 00:58:10.350

Stephanie Bogan: We do everything well going for it, we create the clarity we define the role we hold them to the role right, so it breaks down when we don't clarify our roles.

410

00:58:12.600 --> 00:58:25.350

Stephanie Bogan: functionally and sprayed paste style culture, when we when they're not when they're actually night when we don't manage to expectation, so when we don't set standards and then, when there are breakdowns.

411

00:58:27.660 --> 00:58:39.900

Stephanie Bogan: Which is really funny because that absolutely models, the clarity, transparency and accountability right we've got to make sure everybody knows what is expected on both sides of the fence with with HR and all with human capital i'm always talking about common language.

412

00:58:40.950 --> 00:58:54.060

Stephanie Bogan: Great it's the firm's responsibility to let that person know what the expectations are create the path provide the resources and then to create a path for those with hustle to make their way up through the ladder because that's how you measure hustle.

413

00:58:55.110 --> 00:59:03.210

Stephanie Bogan: it's not a quiz right and we need to be okay with that or have a path out for people if that's if that's not what we're looking to hire.

414

00:59:04.500 --> 00:59:14.940

Stephanie Bogan: So these are these little things that we just sort of put off or delay are almost always symptoms, or



maybe not almost always a lot of the time they are symptoms of bigger things for that compounding interest.

415

00:59:15.480 --> 00:59:19.500

Stephanie Bogan: Of hey you know, we should probably tend to this because there's something behind the something.

416

00:59:20.880 --> 00:59:24.600

Stephanie Bogan: So Jay is gonna now have some next steps right Jay.

417

00:59:28.380 --> 00:59:29.130

J Miller: Yes.

418

00:59:32.460 --> 00:59:33.540

Stephanie Bogan: All right, okay.

419

00:59:35.160 --> 00:59:35.310

Stephanie Bogan: well.

420

00:59:36.120 --> 00:59:38.970

Tiffany Charles: Where am I, the way our team recently did.

421

00:59:39.960 --> 00:59:48.120

Tiffany Charles: As a team building event I step had us do the disk and we have a lot of people who like strength finders and we've done myers briggs.

422

00:59:48.630 --> 00:59:55.140

Tiffany Charles: I love colby but the disc on we did it as a team building I brought in a consultant to walk us through it and she.

423

00:59:55.350 --> 01:00:05.100

Tiffany Charles: picked it as birds and did all this thing, but it was really, really good for our team and stuff no joke like we can utilize it now in like we're already utilizing it in our hiring process.

424

01:00:05.700 --> 01:00:14.310

Tiffany Charles: it's coming up in teams it's normalizing a task or collaboration or communication breakdowns versus making it personal.

425

01:00:14.580 --> 01:00:21.360

Tiffany Charles: Because there's an ability that it's like on the table that this disconnect would maybe be exists between a D and.

426



01:00:21.780 --> 01:00:32.880

Tiffany Charles: s or an isc or whatever that looks like so it's normalizing some of those breakdowns so that we have a place for it to land and talk about versus it feeling personal.

427

01:00:33.180 --> 01:00:43.410

Tiffany Charles: So that we can create solutions, so I highly recommend it also it was really can especially coming back after coven it was a really great connecting point for our team.

428

01:00:43.740 --> 01:00:48.960

Tiffany Charles: So if you're feeling some of those breakdowns on your team, so the collaboration of the creative careers ladders and.

429

01:00:49.230 --> 01:00:55.500

Tiffany Charles: Just understanding why maybe somebody processing one thing or there's just a disconnect that you're like Why am I always bumping up here.

430

01:00:55.800 --> 01:01:04.860

Tiffany Charles: It because you're operating very differently so how can you learn more about them to create that space so Jay like or and then anybody.

431

01:01:05.490 --> 01:01:21.540

Tiffany Charles: that's a really big way to like uncover and help your team and normalize some of the frustrations and take away the the drama of those frustrations and make it just very just you just normalize it.

432

01:01:22.560 --> 01:01:31.050

Stephanie Bogan: yeah and the thing of it, I can, I can tell you this having done a lot of profiles over the years, and I think the way tiffany's use them is is really on point.

433

01:01:31.920 --> 01:01:39.270

Stephanie Bogan: Is if someone's in a position and it's not feeling good for you it's probably not feeling good for them.

434

01:01:39.810 --> 01:01:52.140

Stephanie Bogan: And that is almost always an indication that the role that they're filling and some part of their behavior their style their motivators their values is not aligned with the role and culture in some way.

435

01:01:53.100 --> 01:01:59.970

Stephanie Bogan: So we did the certification, years ago, and there was a lot of really fascinating research around it, one their yearly really accurate.

436

01:02:01.170 --> 01:02:08.220

Stephanie Bogan: And it's what I call that under the hood observable behavior but what what it really breaks down to you're going to find this really funny is energy.



437

01:02:09.390 --> 01:02:17.370

Stephanie Bogan: So if you've done colby or disc or any of those you'll notice that they have these lines right the median line here I go with my very powerless drawings right.

438

01:02:17.760 --> 01:02:34.260

Stephanie Bogan: And you know someone might be right here, right in their drive or they might be way up here they might be way down here, but they don't often tell you, which is a great little tip to know is, the more high or low, it is the more intense the rating, the less flexible, it is.

439

01:02:35.910 --> 01:02:44.220

Stephanie Bogan: So Adam and I were looking at candidates for his service advisor position and we really, really, really liked one of them, but like a lot of his scores were pegged it like a one or two.

440

01:02:45.030 --> 01:02:51.600

Stephanie Bogan: And I was like that's what we're going to get that's what we're all we're going to get no matter what, no matter how like, no matter what he says, no matter how motivated like.

441

01:02:51.930 --> 01:02:56.520

Stephanie Bogan: A one is like I am an immovable object like literally.

442

01:02:57.000 --> 01:03:09.090

Stephanie Bogan: So that gives you a sense of the intensity, but it can absolutely let you know our people organized in terms of how they what they like and behave disc I like because you can get values versions of it, the motivators.

443

01:03:09.870 --> 01:03:20.190

Stephanie Bogan: We had a team Member once she was amazing she was in design and we kept trying to get her to take on more and manage more we gave her more money and lo behold, I just didn't seem to work because.

444

01:03:20.490 --> 01:03:28.230

Stephanie Bogan: turns out she wanted to spend all your free time i'm not kidding at the library teaching English as a second language which I was completely for but I had no idea.

445

01:03:29.040 --> 01:03:37.410

Stephanie Bogan: And so that alignment so profiles are really good way to if you just to tiffany's point around a team exercises a really good way to just do it in general.

446

01:03:37.770 --> 01:03:48.570

Stephanie Bogan: But it helps you get clarity around where Might there be misalignment people can so most of the profiles will kind of give you their natural style and they're adapted style that's what this does.

447

01:03:49.080 --> 01:03:56.400



Stephanie Bogan: Your natural style, is what I like to call your island self i'm on an island, I get to run my island in the way that I want.

448

01:03:57.150 --> 01:04:02.460

Stephanie Bogan: Right js islands going to have a bunch of hustle going on right tiffany's islands going to have.

449

01:04:02.760 --> 01:04:13.200

Stephanie Bogan: Right probably we're gonna have some like we're gonna have fireside chats at night right paintings islands gonna be some other way but it's going to be reflective our natural style, but none of us live on an island.

450

01:04:13.830 --> 01:04:22.140

Stephanie Bogan: So, all we have a lot of influence over our lives, we have to engage in the world, we have jobs that require things of us that we're not 100% in every single area.

451

01:04:22.380 --> 01:04:35.880

Stephanie Bogan: We take jobs for the money you know i'm talking about your teams right, and then you find out oh I don't love every part of this job, so what happens is when someone is adapting off their natural score their natural tendency, it requires energy.

452

01:04:37.200 --> 01:04:47.160

Stephanie Bogan: If i'm not attentive to detail and I have to go through paperwork you guys know this what's The thing that you love doing it takes note right it's natural and easy energy creating it's the same for them.

453

01:04:47.520 --> 01:04:57.570

Stephanie Bogan: So when there's that misalignment between our expectations, he thinks he's a service advisor and you think you should be hustling or just the role and the culture.

454

01:04:58.200 --> 01:05:08.820

Stephanie Bogan: Right we're kind of culture of hustlers or the person hey I think it's great that i'm in a firm of hustlers I want to be a hustler gosh turns out i'm really not a hustler.

455

01:05:10.830 --> 01:05:20.040

Stephanie Bogan: Right so just having the grounding in what's under the hood for us in them what are our communication styles right if we're super we tend to hire people like us.

456

01:05:20.370 --> 01:05:30.060

Stephanie Bogan: We tend to need to leverage ourselves with people not like us right, you need the complete set right, I need someone to follow behind me and make sure the right things are handled the way that I want right.

457

01:05:30.360 --> 01:05:38.550

Stephanie Bogan: All of those things start to really matter when you really want to get this momentum going to go back to that slide I can't find my mouse here.



458

01:05:43.980 --> 01:05:46.830

Stephanie Bogan: We see it moving on my screen, I really do all right here we go.

459

01:05:52.200 --> 01:05:58.560

Stephanie Bogan: So it's interesting that this came up, because this is actually the conversation that tiffany and I had tiff do you wanna do you want to take them through.

460

01:05:59.880 --> 01:06:02.460

Tiffany Charles: As far as the momentum and.

461

01:06:02.580 --> 01:06:11.490

Stephanie Bogan: yeah we'll just share a little bit about how it showed up in your experience and then you know why you think it's important for them, and if you guys have any questions drop them in.

462

01:06:12.150 --> 01:06:18.240

Stephanie Bogan: slide over chat and then, if if we have another hot seat up allison let me know and we can we can roll forward if we need to.

463

01:06:18.270 --> 01:06:19.620

Limitless Adviser: Your on your view stuff.

464

01:06:20.160 --> 01:06:20.790

Stephanie Bogan: Oh sorry.

465

01:06:22.800 --> 01:06:23.640

Stephanie Bogan: presenter view.

466

01:06:25.950 --> 01:06:28.110

Stephanie Bogan: What I don't know a man's right are you looking at this.

467

01:06:28.470 --> 01:06:29.670

Limitless Adviser: yeah we're looking at the notes.

468

01:06:30.330 --> 01:06:31.110

Stephanie Bogan: Oh that's weird.

469

01:06:32.220 --> 01:06:32.640

Limitless Adviser: Here we go.



470

01:06:33.630 --> 01:06:46.290

Stephanie Bogan: Okay, I want it noted that, when I i'm share the screen, it was set up, so that it was all right here in front of me and presenter view is over there and all they did was click back in and it's which I swear I didn't touch anything I have tech gremlins.

471

01:06:47.520 --> 01:06:59.940

Stephanie Bogan: In a full time tech person that's that's our growth goal we're just going to grow to a point that I have like some super awesome person who just follows me like right around park city managing my tech all right there's a goal I love it kids with me.

472

01:07:00.840 --> 01:07:08.760

Tiffany Charles: yeah, and so I you know stuff hit on this a little bit earlier but, like, I really do feel like we're perfectly aligned to have the outcomes that we.

473

01:07:09.030 --> 01:07:14.190

Tiffany Charles: Currently, have right like that we have, like the perfect strategies to get exactly where we want to be.

474

01:07:14.970 --> 01:07:20.580

Tiffany Charles: And to get to this next level, we have to shift our strategies we've grown to a point where.

475

01:07:21.210 --> 01:07:26.280

Tiffany Charles: So we're just over \$3 million in revenue as a firm like we've grown to a point that like.

476

01:07:26.610 --> 01:07:38.130

Tiffany Charles: grit and grind don't get us there anymore right like the grit and grind will serve us to 3 million, but we have to delegate, and we have to create real clarity and direction and have.

477

01:07:38.790 --> 01:07:45.900

Tiffany Charles: Our rocket boosters come when there's more of us doing it well, and the team and what does that look like.

478

01:07:46.980 --> 01:07:55.530

Tiffany Charles: And so the individual momentum is a place where like as we've been trying to figure out how do we get everybody on that direction stuff put it really well but it's like.

479

01:07:55.860 --> 01:07:58.890

Tiffany Charles: You know we're like tugboats just like pushing this.

480

01:07:59.190 --> 01:08:10.350

Tiffany Charles: You know cruise ship out and instead of just taking the time to fix the engine that actually allows this cruise ship to like go out to sea right and as a tugboats like we're never we're never leaving the bay like we're



always just going to be there.

481

01:08:10.680 --> 01:08:16.380

Tiffany Charles: And and that's really what was happening like I was focused on growth and.

482

01:08:17.640 --> 01:08:31.560

Tiffany Charles: Jared was focused on you know vision and client experience and our teammates Members on had roles, but they really didn't understand like how those needed to work together in order to create the contingency.

483

01:08:32.190 --> 01:08:42.090

Tiffany Charles: If we had to pick up and move our firm right now and we'd be in a world of hurt and the fact that, like most of our stuff is very people dependent at the moment right or.

484

01:08:42.420 --> 01:08:57.030

Tiffany Charles: Our roles weren't offering the contingency aspects that we really needed them to in the sense of if there was a transition if there's a maternity leave, if there's whatever it could be caregiving vacation you name it that those positions were.

485

01:08:58.050 --> 01:09:05.520

Tiffany Charles: were really set up to support one another but also create that space, so that not only could our team have the agency in the culture that we're looking to.

486

01:09:06.000 --> 01:09:14.820

Tiffany Charles: To define but there's transparency and accountability, though, to the standards of excellence that we want to be as a firm so got to this point where.

487

01:09:15.540 --> 01:09:17.700

Tiffany Charles: Just pushing for the last two years, and we are like.

488

01:09:18.270 --> 01:09:27.720

Tiffany Charles: grinding to get the growth we have entrepreneur line that launched, we have a very clear like investment planning we added ESP strategies we're looking at crypto we're doing all these exciting things.

489

01:09:28.350 --> 01:09:37.950

Tiffany Charles: And, and there was just exhaustion and we weren't moving the way that we we wanted to, and I called stuff and i'm like what is going on, and it was like.

490

01:09:38.550 --> 01:09:49.320

Tiffany Charles: we're going to need to slow down to speed up we're going to have to shift like this is part of the generation shift, as well as Jared and I getting very clear on the direction of the future, but.

491



01:09:50.040 --> 01:09:59.340

Tiffany Charles: How we get everybody on one page and we get clear, transparent, we can hold accountable accountability create that culture of accountability.

492

01:10:00.510 --> 01:10:12.690

Tiffany Charles: Jared and I believe wholeheartedly that our failures are always with us as leaders right and it's because of US it's our fault and that's true and I think that's a really great way to lead a firm.

493

01:10:13.230 --> 01:10:20.190

Tiffany Charles: And we also need a level of accountability and ownership from the team Members who are part of our culture, because they're amazing people to.

494

01:10:20.670 --> 01:10:25.140

Tiffany Charles: Jay when you said that i'm like they're amazing self motivated and.

495

01:10:25.680 --> 01:10:41.880

Tiffany Charles: Intelligent skilled wise experienced teams, but yet when you put them all in positions where they're not clear and operating together we're setting them up for failure we gave them agency without accountability, how are they supposed to succeed in that right so.

496

01:10:42.450 --> 01:10:54.720

Tiffany Charles: We have made the decision as a firm to like okay we're going to take some breaths instead of going for you know that 20% growth rate we're going to dial it back and look at where our breakdowns.

497

01:10:55.590 --> 01:11:01.770

Tiffany Charles: we're going to create a system so that we can figure out where the breakdowns are that we just don't know we don't know right hey like.

498

01:11:02.250 --> 01:11:18.660

Tiffany Charles: How is that happening at somebody else's level or or somebody else on my team when i'm not in their office every day or i'm not seeing it like How does that, how do we give them a place to have breakdowns land, so we really created a system around awareness.

499

01:11:19.740 --> 01:11:25.620

Tiffany Charles: scale of one to 10 like our internal mission is, we want to have an environment where talented people can thrive.

500

01:11:25.890 --> 01:11:33.210

Tiffany Charles: That was determined within weeks of Jared and I coming together and we knew that that's what we wanted, and when we had to get real with ourselves.

501

01:11:33.480 --> 01:11:40.860

Tiffany Charles: scale to one to 10 we're not where we want to be on that our team is not in an environment where



they can thrive in a way that we're really excited about.

502

01:11:41.130 --> 01:11:50.040

Tiffany Charles: Most of that comes down to system and tech breakdowns they're doing more in a space that doesn't allow them to be in the seat to deliver what is most of them.

503

01:11:50.730 --> 01:12:05.190

Tiffany Charles: The second piece was accountability, where is that falling it's messy and we take the accountability, because the breakdown is in process or a bad process or training like it's it's really where that sits right now so we've created a way to create standards for the.

504

01:12:05.400 --> 01:12:10.140

Stephanie Bogan: I want, I want to interject here because I think it's important, and it can be hard it's harder to do this for yourself, but you.

505

01:12:10.140 --> 01:12:19.260

Stephanie Bogan: Truly can right, I tried to do a result, all the time and it's right it's something you have to be really aware of is the conversation was.

506

01:12:19.800 --> 01:12:37.770

Stephanie Bogan: hold on a minute like, why are we doing all of these things if home base if home is not running smooth right we're not opening the satellite office and I mean literally but it's you know these projects and initiatives until the core of your firm like just the core is the guts are working.

507

01:12:39.060 --> 01:12:47.820

Stephanie Bogan: Right all of that is just fans and it's great, and I know all about it, I know all about it, and following it and growing because I get it.

508

01:12:48.570 --> 01:13:02.040

Stephanie Bogan: But there's a cost to it and so accountability in our conversations when when tiffany was explaining all of this there was like a hard break where I said whoa who is accountable.

509

01:13:03.960 --> 01:13:13.920

Stephanie Bogan: Right you've hired them you've trained them you've managed them you've chosen the priorities you've changed the directions, they, by all accounts are trying i'm not saying that they're all executing in an individual level.

510

01:13:14.250 --> 01:13:19.140

Stephanie Bogan: In the way that you want what i'm saying is I don't even see that we have in an environment where we can fairly evaluate that.

511

01:13:21.300 --> 01:13:31.020

Stephanie Bogan: And until we can create that environment we can align in the roles and get the momentum that we



need, and then engage those initiatives in a way that has a lot more leverage for you and Jared.

512

01:13:31.590 --> 01:13:43.800

Stephanie Bogan: so that you can lead not babysit because there's a huge difference so just don't lie to yourself if you're babysitting you're babysitting if you're leading you're leading be accountable for one and that was the That was the hard coach conversation.

513

01:13:44.340 --> 01:13:50.130

Stephanie Bogan: They took it in great stride and immediately acted on it that's the great like that's how you get the results conversation.

514

01:13:51.480 --> 01:14:01.680

Stephanie Bogan: But I don't want you to skip it because I have been doing this for 28 years now, and people may be really good money to go in and evaluate their firms and founders every single time they're like 90% of them.

515

01:14:02.190 --> 01:14:12.660

Stephanie Bogan: Okay, tell me what we they need to change at the end of the day and i'm always like okay Well, this is the part that you paid for that you didn't bet on and it's that.

516

01:14:13.410 --> 01:14:19.830

Stephanie Bogan: When you go like this there's like four fingers pointing back at you, I was like let's talk about how we got here first, please.

517

01:14:20.520 --> 01:14:25.770

Stephanie Bogan: Then we can talk about how we create accountability and then you all know how that goes at the end of the conversation.

518

01:14:26.460 --> 01:14:36.750

Stephanie Bogan: So this is my invitation to you to ask yourself how can you be more accountable Is there something that you're holding that you need to set down, is it.

519

01:14:37.170 --> 01:14:48.660

Stephanie Bogan: Right, the fear that you've hired the wrong person, maybe you have but there's only one way to know right give them the tools they need to do the job some time and training, ideally, a process and tech would be great.

520

01:14:49.800 --> 01:14:57.720

Stephanie Bogan: And then take it from there, but if you haven't done those basic things it's really hard to justify being unhappy upset or frustrated.

521

01:14:58.050 --> 01:15:07.410

Stephanie Bogan: And if you're unhappy upset or frustrated and you're not accountable as a leader for communicating that to them, and in a positive way, and this is where the breakdown happens, we don't.



522

01:15:07.830 --> 01:15:18.390

Stephanie Bogan: feel like it's going to be positive, so we hide from it and that doesn't serve anyone we spend a lot of energy feeling bad they spend energy feeling bad we spend a lot of cheap energy feeling mess ups, we didn't need to feel.

523

01:15:18.900 --> 01:15:27.150

Stephanie Bogan: All we need to do is sit down and say hey I want to have a conversation with you about kind of how things are working, this is what we need in the role, this is what.

524

01:15:27.600 --> 01:15:32.460

Stephanie Bogan: Is you know kind of where how it's showing up and let's talk about those gaps and what we can do to fill them say.

525

01:15:33.270 --> 01:15:46.920

Stephanie Bogan: And I promise you, if you have a couple of good conversations over time tiffany will attest to this, the baffles will surface you'll get really it's what I call some of you if, like peyton's really gets the 90 day conversation like it's what I call a bra it's a fork in the road.

526

01:15:48.060 --> 01:15:56.730

Stephanie Bogan: The fork in the road conversation says, things can no longer be the same, but you don't say it out loud but that's the undertone of it is This cannot continue.

527

01:15:57.780 --> 01:16:04.770

Stephanie Bogan: Whether it's our partnership or our process breakdowns are you not doing your whatever i'm at five o'clock on Tuesday it's a breakdown.

528

01:16:05.460 --> 01:16:16.440

Stephanie Bogan: And so, going forward that's what I laid out in there here's what the role needs here's what it's getting, how do we fill that gap there's only two paths from here, what are those to pass any guesses.

529

01:16:19.290 --> 01:16:27.450

Stephanie Bogan: We get there for move out right we step up or we don't and they move out, they will move themselves out a vast majority of the time.

530

01:16:28.050 --> 01:16:41.880

Stephanie Bogan: Surprisingly, but sometimes you will move them out and that's okay too and i've done that about 1000 times and everyone always hates it and on the other side, no one knock on wood has ever come back to me and said anything except i'm so glad I really should have done that, sooner not.

531

01:16:43.050 --> 01:16:43.740

Stephanie Bogan: So much better.



532

01:16:45.510 --> 01:16:45.720

Stephanie Bogan: Right.

533

01:16:45.780 --> 01:16:59.790

Stephanie Bogan: Sometimes you have to go through two or three people to get that person, but when you get the person right, so you want your hiring process to improve your probability of success, or is this really good you if you follow it, it will increase your probability.

534

01:17:01.260 --> 01:17:10.380

Stephanie Bogan: But that training and onboarding really matters because that's where you're saying we know what we want you to do here that's what you're essentially saying, and if you can't define it for them you're saying is.

535

01:17:10.710 --> 01:17:17.790

Stephanie Bogan: We don't really know what we want you to do here, we know what kind of stuff we want you to do, but we can't really define it or deliver it to you in a way that you could.

536

01:17:18.180 --> 01:17:24.210

Stephanie Bogan: organize it you're just gonna have to sit in the chair and figure it out as you go, so we do most of the time that's okay good people figure it out.

537

01:17:25.050 --> 01:17:31.440

Stephanie Bogan: But what tiffany it will tell you is when you get them grooving in the right way you get an infinitely like you get an exponentially better result.

538

01:17:31.920 --> 01:17:43.470

Tiffany Charles: yeah I mean I it was within weeks of us being like okay we're going to need to read ground as a firm here's what we're gonna do we're going to focus internal we're going to take off this pressure of stuff said don't mistake momentum for growth.

539

01:17:44.190 --> 01:17:51.690

Tiffany Charles: We have momentum, and then we would like you know, two steps forward two steps back two steps forward and it's just like that doesn't feel good when you're trying to grow.

540

01:17:52.140 --> 01:17:55.710

Tiffany Charles: And so it's just like we got to get clear on some of this, how are we going to do it.

541

01:17:56.400 --> 01:18:08.640

Tiffany Charles: And what is the like acknowledgement of it, how are we creating time and space each week each month each quarter each year to like tackle it, how are we going to communicate that.

542

01:18:09.000 --> 01:18:16.440

Tiffany Charles: And it's fascinating even in a team of 12 we were talking about this this morning, like rumor mill can



happen in a team of 12 so you know what.

543

01:18:16.770 --> 01:18:25.500

Tiffany Charles: Going forward i'm like big rocks every Monday we're circling up on everything that we're taking steps on as a firm so that nobody feels like they're the last to be.

544

01:18:25.770 --> 01:18:34.140

Tiffany Charles: To hear or know or whatnot and it's just really clear on where we're at and how we're moving some there's some pretty big initiatives happening over here so.

545

01:18:34.440 --> 01:18:41.670

Tiffany Charles: That big rocks conversation, it has been a game changer for our team and it's creating the time and space and then.

546

01:18:42.240 --> 01:18:51.510

Tiffany Charles: stuff we'll talk about them, but we've created a ticketing system for breakdown briefs that allow people to just fill it in and send us what were their breakdowns are happening.

547

01:18:51.930 --> 01:19:04.950

Tiffany Charles: But it just creates that time, so we need the acknowledgement and time that not all is perfect, but we're here to solve that together and then that is also creating the agency that we hope that we could.

548

01:19:07.080 --> 01:19:15.450

Tiffany Charles: filter our entire culture so personal agency, historically, is something that you've earned over time, which makes a lot of sense because.

549

01:19:16.110 --> 01:19:23.850

Tiffany Charles: To have that type of flexibility and agency also takes a real level of transparency and accountability, so you have to have a culture that supports it.

550

01:19:24.120 --> 01:19:31.740

Tiffany Charles: Otherwise, you have a lot of flexibility and agency and you lose out on how that operates as a team, and so we did that, as a firm.

551

01:19:32.160 --> 01:19:41.820

Tiffany Charles: cool news is it attracted a lot awesome talent bad news is is we didn't set them up for success or our firm for success in that so we had to really create the systems of like.

552

01:19:42.120 --> 01:19:54.390

Tiffany Charles: love that you get to own your time and decisions and actions now we want to make sure that that's an alignment with your own growth here at the at the firm our team growth and and what we're aspiring to do as a firm.



553

01:19:54.810 --> 01:20:05.010

Tiffany Charles: And really getting clear on that and then action steps each and every week it's like what are these action steps, how are we creating, not as a team who's taking one.

554

01:20:05.580 --> 01:20:14.760

Tiffany Charles: But it's it's strategy, so we have three things that we're hitting we're able to create time and space to address them and then actions related to them versus.

555

01:20:15.360 --> 01:20:20.670

Tiffany Charles: Jared over here running this initiative i'm partly running it over here on with myself on top of.

556

01:20:21.240 --> 01:20:31.770

Tiffany Charles: Another team Member running an entire other initiative like that was when things just weren't working we're like Okay, as a group, these are three things, how are we managing it who's up what.

557

01:20:32.070 --> 01:20:45.270

Tiffany Charles: And one of the big things we're doing is building out an operations manual so we created our eight core areas of business to set all of our standards, which will then go into everything else file and structure team structure, all those fun things.

558

01:20:45.720 --> 01:20:46.980

Tiffany Charles: But how to tackle it.

559

01:20:47.610 --> 01:20:57.240

Tiffany Charles: It was like okay like maybe we should have the whole team and i'm like okay we're going to do this bite size we're selecting three new standards and processes, we want to have clearly defined each week.

560

01:20:57.480 --> 01:21:08.910

Tiffany Charles: We have a setup right after all company meeting for 15 minutes for everybody to go back and provide their input whatever resources they have whatever outdated processes, they have to put them into the filing structure.

561

01:21:09.240 --> 01:21:13.110

Tiffany Charles: we're going to take that we have a template on how we're going to build it out.

562

01:21:13.590 --> 01:21:18.600

Tiffany Charles: And then every Friday, and then we train on those three the following week and we pick another three to go through.

563

01:21:18.900 --> 01:21:35.370

Tiffany Charles: it's going to take us well it's probably never ending but it's going to take us through February to get that all set up as a team, and then you can utilize that to build out workflows and everything else big project doesn't



feel overwhelming with our team taking three bites a week.

564

01:21:36.480 --> 01:21:49.560

Tiffany Charles: And if that becomes overwhelming we go to two and so that's something that we've addressed as a firm but it hits all all five of those areas of awareness accountability acknowledge agency action.

565

01:21:50.580 --> 01:21:57.300

Stephanie Bogan: So I thought I want to appreciate that example because I think it really shows that, as you scale and grow.

566

01:21:57.900 --> 01:22:04.170

Stephanie Bogan: As reading of the kids this article for next meeting is next month, but I was just talking about the one thing that seems to grow as.

567

01:22:04.500 --> 01:22:12.390

Stephanie Bogan: As the seems seems to come with us as we grow as more stressed and satisfaction right because those problems that we don't deal with along the way.

568

01:22:12.690 --> 01:22:20.490

Stephanie Bogan: compound and then they magnify and we hire over them we get busy so we hire more people which compounds the problems.

569

01:22:20.760 --> 01:22:27.660

Stephanie Bogan: right if we have a lack of clarity, transparency and accountability and we get busy, and we hire more people on top of them and just literally compounds the problem.

570

01:22:28.170 --> 01:22:36.450

Stephanie Bogan: So great whether you have a part time assistant for a couple hours a week or you have right a team of 12 or 15 these these still apply.

571

01:22:36.960 --> 01:22:46.350

Stephanie Bogan: Right I want each of you to ask these questions around how you're using people in leverage and is there anything that you can be setting down, is it creating time for training is it.

572

01:22:46.980 --> 01:22:52.620

Stephanie Bogan: You know, taking accountability for the role that you played, is it making sure that they've got the tools and the training that they need.

573

01:22:53.100 --> 01:23:01.680

Stephanie Bogan: So, and for those of you that have you know, three, four or five 810 12 TEAM members this becomes more important because you are really building that wagon wheel.

574



01:23:02.130 --> 01:23:13.410

Stephanie Bogan: And then, as you build groups in your firm race teams or departments, those are the wheels on your wagon and so each team and group needs to work seamlessly and roll along smoothly and then each of.

575

01:23:13.770 --> 01:23:20.760

Stephanie Bogan: The wagon wheels groups or departments need to roll along smoothly, because if the wheels are moving at different speeds imagine how that goes right you've got one group.

576

01:23:21.060 --> 01:23:24.930

Stephanie Bogan: That happens a lot with sales is really growing and right service has to keep up.

577

01:23:25.530 --> 01:23:32.580

Stephanie Bogan: or when services really overwhelming and as a result, we have no time to go out and market that's when the wheels aren't working and paste, and so we want to build.

578

01:23:33.240 --> 01:23:44.280

Stephanie Bogan: Is a wagon race we've got our sales and marketing we've got our operations we've got our client service we've got our advice read clients, the the advisor part we want to make sure that those are all working in tandem.

579

01:23:45.360 --> 01:23:50.130

Stephanie Bogan: And that, when you put the limitless lessons together in an integrated way that's ultimately what you get.

580

01:23:50.970 --> 01:24:00.060

Stephanie Bogan: Right brand flows, the story flows to the niche to the surface mount right to the system like we really take you through that whole like the path that you need to go through to build.

581

01:24:00.480 --> 01:24:06.780

Stephanie Bogan: The firm that will allow you to deliver that scale with a really well organized team, whether it's one or 10.

582

01:24:07.290 --> 01:24:17.310

Stephanie Bogan: Right and then do it in a way that makes the business run so that you can take time out of it stress free, knowing that not that there's no problems, not that things don't happen or that things don't break because they do.

583

01:24:17.760 --> 01:24:20.160

Stephanie Bogan: But that is the exception, not the norm.

584

01:24:21.030 --> 01:24:30.870

Stephanie Bogan: Right and then you've got to tiffany's point of process for that right if you're off for a month somewhere and there is a client, with the crisis, you should have decided in advance how you're going to handle that



not after the fact.

585

01:24:31.770 --> 01:24:33.900

Stephanie Bogan: So hopefully this will help you really kind of.

586

01:24:34.500 --> 01:24:42.720

Stephanie Bogan: Ground yourself in the idea that you and your team's momentum is a force right it's something I want you to be thinking about is that working.

587

01:24:43.020 --> 01:24:55.020

Stephanie Bogan: seamlessly I you know synergy is the word but right synergy is that all really flowing or are there places where the wagon wheels aren't really right or people on the team aren't working in the ways that they need to.

588

01:24:55.500 --> 01:25:02.100

Stephanie Bogan: Or that we're not working in the ways that we need to so think about that all right we've got some do we have any questions allison.

589

01:25:02.850 --> 01:25:08.100

Tiffany Charles: We have lori who I think has a question, yes.

590

01:25:09.600 --> 01:25:12.270

Stephanie Bogan: lori did you want to be in the hot seat or did you just have a question.

591

01:25:14.040 --> 01:25:15.510

lorie scheibel: Is there time to be a hot seat.

592

01:25:15.660 --> 01:25:16.260

Stephanie Bogan: Here is.

593

01:25:16.710 --> 01:25:18.540

lorie scheibel: OK so.

594

01:25:19.650 --> 01:25:30.420

lorie scheibel: i'm going to i'm going to go along with James the way that Jay started in and say that we were stuck and just say that I am stuck with a staffing issue and so.

595

01:25:31.110 --> 01:25:43.440

lorie scheibel: i've got a guy that has worked for me for going on two years virtually which has been fine so she said, there was no transition from in the office to virtual over coven but.



596

01:25:44.730 --> 01:25:54.810

lorie scheibel: To be honest, she's a rock star when it comes to certain tasks and but she's not proactive she has to other folks that she works, for she won't.

597

01:25:55.620 --> 01:26:00.210

lorie scheibel: there's a very little transparency when it comes to how many hours she's actually working for me.

598

01:26:00.720 --> 01:26:08.850

lorie scheibel: And I can i've tried, since the beginning of the year to get her i've shown her well i've been with limitless three years now for so i've shown her.

599

01:26:09.180 --> 01:26:18.930

lorie scheibel: You know goals and annual goals and and and she she just doesn't seem to want to get there, so i've tried on a couple of occasions to to.

600

01:26:19.470 --> 01:26:28.350

lorie scheibel: breach the i'm not gonna I don't tell you how many hours I work it doesn't it's not really part of my business model I just do what you, no matter what you asked me to do I just do it.

601

01:26:28.980 --> 01:26:36.180

lorie scheibel: And she kind of does and so i've decided okay fine then i'm just going to step up what i'm asking her to do so i've asked her to do more and more and more.

602

01:26:37.650 --> 01:26:48.270

lorie scheibel: But, yet it doesn't feel right to me because I feel like I still need to be the owner of on the asked her she's the viewer on so I still have to own.

603

01:26:48.930 --> 01:27:00.630

lorie scheibel: everything that needs to get done, and then I have to manage is she doing it and I don't want that, so I finally worked a job description and decided she wasn't the person for the job and I didn't have the heart.

604

01:27:01.710 --> 01:27:12.570

lorie scheibel: To to let her go, so I offered I said, this is what I want it's not what you're giving me here's What I want, and she said, well, I can give you that I whining to just say so.

605

01:27:13.830 --> 01:27:17.820

lorie scheibel: And she stepped up her she's up level what she's doing for me and I.

606

01:27:19.020 --> 01:27:35.280

lorie scheibel: But in my heart of hearts, I still don't think that she's going to be the person, because I can't get her to tell me how many hours she's working which frustrates me because I don't know she's working 15 hours or 25 hours and I don't know how to compensate around a had a bonus or.



607

01:27:37.110 --> 01:27:41.130

Stephanie Bogan: If she she worked for you directly, as she through one of the firm's you she.

608

01:27:41.880 --> 01:27:45.810

lorie scheibel: She is with that another she was she's with a lady who has.

609

01:27:46.500 --> 01:27:59.760

lorie scheibel: I guess you'd say it's a firm I don't pay her directly but it's a very informal small kind of arrangement and and that firm provides no value to me whatsoever I don't i've never spoken to the person in to the other person in two years.

610

01:28:01.530 --> 01:28:03.180

Stephanie Bogan: All right, so.

611

01:28:04.380 --> 01:28:06.900

Stephanie Bogan: Are they charging you by the hour they charging you a flat rate.

612

01:28:07.290 --> 01:28:08.880

lorie scheibel: a flat rate a monthly flat rate.

613

01:28:09.090 --> 01:28:09.390

Stephanie Bogan: Okay.

614

01:28:09.780 --> 01:28:17.880

lorie scheibel: And the first year I used her if she probably didn't have to work she does for me now, which is to say, I either overpaid or that or i'm underpaying or now I don't know which.

615

01:28:18.180 --> 01:28:23.850

Stephanie Bogan: yep so how many hours are you paying for her like is it a percentage or a set number of hours or.

616

01:28:24.360 --> 01:28:25.680

lorie scheibel: No, I don't know.

617

01:28:26.700 --> 01:28:28.020

lorie scheibel: What it's whatever I need.

618

01:28:28.710 --> 01:28:39.360

Stephanie Bogan: Okay well one if I were coaching that business, I would suggest that they give you some they give their clients some clarity, because ultimately what you're looking for is how much can I use you.



619

01:28:40.110 --> 01:28:46.800

lorie scheibel: Right i've said that she said, well, what happens if I keep asking I keep I keep asking because I want somebody that I can.

620

01:28:48.000 --> 01:29:03.900

lorie scheibel: I can compensated appropriately and I don't know if I am compensated, so what happens if I keep asking and and then you say you've reached your limit what is that limit she said 25 hours, I promise you she's not working 25 hours for me I don't know I don't trust it.

621

01:29:04.200 --> 01:29:05.520

Stephanie Bogan: Okay, so.

622

01:29:07.170 --> 01:29:10.320

Stephanie Bogan: Is there any kind of arrangement for time reporting with the firm.

623

01:29:12.000 --> 01:29:12.330

Her.

624

01:29:13.500 --> 01:29:14.700

lorie scheibel: I don't know she.

625

01:29:15.030 --> 01:29:16.140

lorie scheibel: told me she won't tell me.

626

01:29:16.800 --> 01:29:22.530

Stephanie Bogan: Okay, so one as you notice look on everybody's faces where they're kind of like this seems really interesting.

627

01:29:22.950 --> 01:29:37.530

Stephanie Bogan: it's interesting because I don't like either she can't answer that I don't know why they're not answering the question you're entitled to get an answer to you know i'm paying X for 25 hours i'd like to know that i'm getting 25 hours that's safe.

628

01:29:37.560 --> 01:29:45.900

lorie scheibel: To say she'll say our business model is we don't ever want first of all, they don't want to have to be accountable to hours because she'll say well i'm on the phone with the vendor.

629

01:29:46.320 --> 01:29:54.720

lorie scheibel: You know, every 20 minutes and annuity company i'm going to be doing other work as well, and maybe it's not for me it's one of the other two advisors.



630

01:29:55.800 --> 01:30:06.180

lorie scheibel: So you know I can't I can't you know parse out what is for you, and what is for them, plus we just want you to ask, we want you to know that we're here to handle your needs you just ask us.

631

01:30:06.300 --> 01:30:13.800

Stephanie Bogan: Okay, so it sounds like they just have a very loosely defined business model and i'm not going to coach them through you right that just is what it is.

632

01:30:14.790 --> 01:30:25.950

Stephanie Bogan: don't take advantage of it from a mean perspective, but if you're do 25 hours a week dole out as much work, as you can until you hit that 25 hours a week, because we you don't you you've never even gotten close you don't know.

633

01:30:26.460 --> 01:30:32.490

Stephanie Bogan: where you are in relationship to that number, and what I hear her saying without saying it is she's not keeping track.

634

01:30:33.150 --> 01:30:35.280

Stephanie Bogan: Right i'm on the phone with it so she can't answer the.

635

01:30:35.280 --> 01:30:41.310

Stephanie Bogan: question for you, is why you're not getting an answer that question she's saying hey I feel like it's fair keeps into the checks and i'll keep doing work.

636

01:30:41.640 --> 01:30:46.170

Stephanie Bogan: So one you want to up level, the amount of work that you're giving her without question.

637

01:30:47.100 --> 01:30:59.130

Stephanie Bogan: What the past is is irrelevant, this is not that fun, but it's irrelevant, because we got where we got right we didn't have the conversation sooner we did make the change if she's, the question is is she doing good work.

638

01:31:00.480 --> 01:31:00.750

Stephanie Bogan: She.

639

01:31:01.890 --> 01:31:07.200

lorie scheibel: she's doing much of what she does is very good it's not excellent.

640

01:31:07.380 --> 01:31:07.740

lorie scheibel: And she.



641

01:31:08.190 --> 01:31:12.780

lorie scheibel: And she and she only does what I asked her to do and not really very much more OK.

642

01:31:13.260 --> 01:31:23.580

Stephanie Bogan: So the nature of that relationship is such that she's probably going to do just what you asked her to do and not much more because she's not your personal person like Lisa goes.

643

01:31:23.940 --> 01:31:29.400

Stephanie Bogan: Out of her way to think about things that make my life easier or that helped me or prep me.

644

01:31:29.670 --> 01:31:31.860

Stephanie Bogan: Because she's my person right that's a.

645

01:31:32.310 --> 01:31:33.390

lorie scheibel: Great great.

646

01:31:34.800 --> 01:31:37.080

Stephanie Bogan: thing to your point you have to decide.

647

01:31:37.080 --> 01:31:50.850

Stephanie Bogan: One do you have I call it functional work you have just basic service work that you can task out to do, and then hire a person to be your person what you're really talking about is someone who's like a client manager what I call a client relationship manager.

648

01:31:51.270 --> 01:31:53.400

Stephanie Bogan: Right or a or your aunt right when we talk about the.

649

01:31:53.400 --> 01:32:06.420

Stephanie Bogan: entourage it's the person that manages year, which is here the clients that are coming in, this is why I need to make sure that the process is moving along and I need to tell lori when to show up for it not lori directing the process and having to fix.

650

01:32:06.450 --> 01:32:07.890

Stephanie Bogan: That that's what we all want right.

651

01:32:08.460 --> 01:32:11.400

Stephanie Bogan: Right so step one is, you have to define the process.

652

01:32:12.900 --> 01:32:21.330

Stephanie Bogan: Every time you have to define here's what I want from you here's What I want, I want to here's



what I want meeting prep to look like here's how I literally sat down with Lisa like here's how I want you to go through my day.

653

01:32:21.810 --> 01:32:27.390

Stephanie Bogan: I want you to do this if it's purple it means they didn't get to it or rescheduling and you do this right and then she's teaching load it like.

654

01:32:27.720 --> 01:32:34.020

Stephanie Bogan: it's that process of what exactly is that common language so redefining the job description is very useful.

655

01:32:34.440 --> 01:32:41.850

Stephanie Bogan: Because you're going to want in your discussion like literally you're going to want to write in the job description right like I need a rock star who can manage my world.

656

01:32:42.060 --> 01:32:47.400

Stephanie Bogan: Right your job is to come in, make sure that the clients are prepared, like whatever those things are.

657

01:32:47.610 --> 01:32:59.550

Stephanie Bogan: So that I show up right do what I need to do, like a rock star like that's your number one job, and in order to do that you will do paperwork, you will do scheduling you will do so, we hire client service people.

658

01:33:00.300 --> 01:33:11.310

Stephanie Bogan: And then we're like hey Where are you rocking my world because hey get this paperwork from point A to Point B is a very different expectation then manage the client work all the way through the process.

659

01:33:12.060 --> 01:33:21.690

Stephanie Bogan: And you let me know when you need something for me is entirely great So you see there's just different there's a difference between directing and delegating and then at some level doing ourselves.

660

01:33:22.290 --> 01:33:29.700

Stephanie Bogan: So I think what you want, is that person that you can turn to that's like you want your Cooper right, I want you to write be in charge in my world.

661

01:33:30.720 --> 01:33:33.900

Stephanie Bogan: And here, and then you define what's in that job description.

662

01:33:34.770 --> 01:33:36.030

lorie scheibel: So I did all that.

663



01:33:36.090 --> 01:33:38.430

lorie scheibel: And what makes you think I can't do that.

664

01:33:38.490 --> 01:33:44.580

Stephanie Bogan: and give right So if you feel like I haven't heard you say anything awful about her like in general it's hey she's really good.

665

01:33:44.880 --> 01:33:48.450

Stephanie Bogan: Not excellent right so there's something there that's not clicking.

666

01:33:48.810 --> 01:34:00.090

Stephanie Bogan: So the click is either that you haven't done a good enough job of communicating to her what you really need with specificity enough that she can deliver it or you haven't done that enough.

667

01:34:00.570 --> 01:34:02.130

Stephanie Bogan: That you can evaluate it.

668

01:34:02.910 --> 01:34:11.580

Stephanie Bogan: So you really are at an inflection point where you make a decision it's your fork in the road either you're going to give her the new job description have the heart to heart and be like hey you've done pretty darn good work.

669

01:34:11.850 --> 01:34:19.350

Stephanie Bogan: Here are some areas where I would love to see you take it up a notch, this is what would this would take us from good to great have the conversation because.

670

01:34:20.040 --> 01:34:25.500

Stephanie Bogan: This is the value of having the conversation it's clear, after the fact, whether they can do it or not.

671

01:34:26.040 --> 01:34:29.610

Stephanie Bogan: Right or whether we can create the space, I was having a conversation with one of you.

672

01:34:29.880 --> 01:34:33.240

Stephanie Bogan: And I was like look in the ideal this person would be amazing in every single way.

673

01:34:33.450 --> 01:34:40.470

Stephanie Bogan: But you don't have you know, like you, don't have time to hire the person that you can train, you need to hire someone who can just come in and rock your world like you just need to go do that.

674

01:34:41.040 --> 01:34:44.460

Stephanie Bogan: And that person will figure all this stuff out but that's a different person than the one you've got:



675

01:34:46.530 --> 01:34:48.480

lorie scheibel: you're saying you're saying that that I mean I.

676

01:34:48.810 --> 01:34:57.390

lorie scheibel: think that that's a different person, but she tells me it's not i've already bought her so I could it's easier to attempt, I believe, to make her.

677

01:34:57.960 --> 01:35:11.790

lorie scheibel: attempt to give her another chance if I do better, but the thing that's holding me back, is it still that she won't come clean on the hours thing and I don't believe that she's only work that she's willing that she works 25 hours, I think she works 10 to 15.

678

01:35:12.300 --> 01:35:12.870

Stephanie Bogan: She might.

679

01:35:14.910 --> 01:35:15.180

Stephanie Bogan: But.

680

01:35:15.300 --> 01:35:20.070

Stephanie Bogan: But you haven't made well you're simply going to have to make a decision it's.

681

01:35:20.250 --> 01:35:20.580

lorie scheibel: You know.

682

01:35:20.640 --> 01:35:25.530

Stephanie Bogan: it's a decision, are you comfortable with that is a as a business decision or not.

683

01:35:25.980 --> 01:35:35.700

Tiffany Charles: Well, also i'm curious um what I hear to is more of the evaluation piece stuff as as as the two of you are talking like do you have a sister so.

684

01:35:36.000 --> 01:35:38.910

Tiffany Charles: She clearly doesn't have an a system that she's like.

685

01:35:39.210 --> 01:35:50.940

Tiffany Charles: tracking and accounting that do you have a system, one for a couple of reasons, if you were to move on to somebody like then she you're creating a system where she is writing her tasks and workflows and creating that position.

686



01:35:51.150 --> 01:35:54.750

Tiffany Charles: That really will run for you so like one, how do you have the contingency there.

687

01:35:55.200 --> 01:36:05.160

Tiffany Charles: But to like could you use a sauna could you use some sort of task management that also create standards where you're like here is the purpose of this and here's my expectation.

688

01:36:05.490 --> 01:36:10.860

Tiffany Charles: At but it's creating those standards so that you have insight into what's happening.

689

01:36:11.640 --> 01:36:18.690

Tiffany Charles: Because, at the end of the day, she may feel like the number of hours don't matter because i'm delivering what you're asking me to write so like.

690

01:36:19.500 --> 01:36:32.040

Tiffany Charles: If that should create the satisfaction agreed upon, so if you're asking her like no I want you from an hour, at least, and we point like to hit more to stuffs point than me like loader up with more until there's pushback or capacity.

691

01:36:32.580 --> 01:36:39.720

Tiffany Charles: But at the end of the day, you're never going to know that timing, because she's not time tracking it and and there's no place for her to come back to.

692

01:36:39.930 --> 01:36:46.350

Tiffany Charles: Not only that, but maybe some of that back and forth on like if she's getting it done and all those things, and then the other thing is.

693

01:36:46.800 --> 01:37:01.290

Tiffany Charles: And steph said, like i'm finding that, like, I have to train someone to think more strategically if i'm looking for them to be in that space otherwise if they're in a role and they're strong implemented like that serves a really great place.

694

01:37:02.310 --> 01:37:10.530

Tiffany Charles: But I have to be very clear that i'm not going to get more from them as far as like thinking big picture, and like creating that strategy there hell of implementing.

695

01:37:10.710 --> 01:37:17.760

Tiffany Charles: And i'm so happy for that, but i'm not going to get them to the space unless one I do some training and to there's a heart to heart, where they're like.

696

01:37:17.970 --> 01:37:25.440

Tiffany Charles: At the end of the day, like that's just not my thing like i'm here to do really good work as it's coming to me and i'll create those lists and I will be.



697

01:37:25.920 --> 01:37:33.810

Tiffany Charles: Excellent at it, but i'm never going to get to that space where i'm thinking about going to the limitless community and asking a question, so that we can get there or.

698

01:37:34.050 --> 01:37:37.980

Tiffany Charles: i'm thinking about researching it to see what what other artists are doing.

699

01:37:38.370 --> 01:37:47.220

Tiffany Charles: or i'm going to ask my you know buddy How are they How are they creating this process with other people right like that's a different person typically.

700

01:37:47.550 --> 01:37:54.570

Tiffany Charles: um, but I think you would really benefit from having a system where you can see it like you don't have transparency.

701

01:37:54.750 --> 01:38:03.030

Tiffany Charles: she's not creating that for you, you can ask her to create it for you'd be like hey we're going to go in a sauna here's what we're going to do, but I think you need some I think you need some transparency into that.

702

01:38:04.290 --> 01:38:09.000

Tiffany Charles: And I think it would benefit you even if you're hiring somebody else to have that transparency and have a write it all out.

703

01:38:10.620 --> 01:38:14.970

Stephanie Bogan: Well, and I think tiffany makes a really good point right, so we talked about the clarity piece.

704

01:38:15.750 --> 01:38:22.920

Stephanie Bogan: Right that's the job description reframing that and then the transparency is we'll talk more about this in the next call but.

705

01:38:23.190 --> 01:38:36.780

Stephanie Bogan: Right, whether it's a task list or a time sheet or in a sauna board it's some level like when your exchange when you are exchanging time for money, as in this situation, you want to make sure that you are fairly getting what you pay for.

706

01:38:38.520 --> 01:38:44.370

Stephanie Bogan: Because if you're under that's one thing, so we have relationships like that we have a retainer each month.

707

01:38:44.910 --> 01:38:54.240



Stephanie Bogan: And if we're over by right more than like a certain percentage right then they'll bill is totally fair and fine, but at one point I was like okay what's your process for letting me know when i'm under.

708

01:38:54.780 --> 01:39:03.270

Stephanie Bogan: And there wasn't a process for letting me know when I was under and I was like so if it roll roll like I had to go back and just say hey I think this is a great real.

709

01:39:03.600 --> 01:39:10.620

Stephanie Bogan: role, does it not role I just need to clarify that it doesn't really roll like the you know they're very.

710

01:39:11.400 --> 01:39:16.920

Stephanie Bogan: You know they're not like oh my God and rates it's been a great relationship, but I still needed that clarity.

711

01:39:17.310 --> 01:39:22.800

Stephanie Bogan: so that I could manage the upside and the downside, so you could go to her and just say.

712

01:39:23.160 --> 01:39:29.970

Stephanie Bogan: hey I you know i'm getting the sense that you're not like I don't know if you track the time or not it's helpful to me as I plan my staffing to know.

713

01:39:30.210 --> 01:39:40.350

Stephanie Bogan: How to budget going forward, based on the level of support i'm getting if i'm you know if i'm getting 10 or 15 hours a week versus 25 like I just need to be able to plan can you give me some sense.

714

01:39:40.800 --> 01:39:53.880

Stephanie Bogan: of how much time on average you spend on us per week, and if you can't get an answer there, then I can almost assure you it means way less than 25 and you should be here find another option, before I give her a lot more work.

715

01:39:54.510 --> 01:40:03.180

Stephanie Bogan: My point around, so I think tiffany's point about what, what are the steps you can take to get transparency, I would start by asking with the frame of I need this to do planning.

716

01:40:04.020 --> 01:40:09.090

Stephanie Bogan: Like give me a ballpark so that you should, I think tiffany and I would agree someone should be able to give you a ballpark.

717

01:40:10.500 --> 01:40:23.370

Stephanie Bogan: And then, once you've got that job description if she has that I can do that, then you have the option of either going to at this point, decide that you just don't think she's the person and look for the post that job and look for that person or you're going to give her the opportunity.



718

01:40:24.870 --> 01:40:28.320

lorie scheibel: Right that's where i'm at that's why i'm stuck because it's it's.

719

01:40:29.550 --> 01:40:32.520

lorie scheibel: She seems to say that she can do it and she's willing to do it.

720

01:40:33.150 --> 01:40:45.510

lorie scheibel: And I just don't I don't think that I think that her lack of trying, I mean her lack of transparency is caused me so much frustration, because I don't because I feel Sometimes I feel like guilty about asking her to do more, because I don't know and.

721

01:40:46.650 --> 01:40:47.670

Stephanie Bogan: And that doesn't feel good is.

722

01:40:47.670 --> 01:40:51.990

Stephanie Bogan: That her issue like you're you're actually saying to me I.

723

01:40:53.010 --> 01:40:57.180

Stephanie Bogan: don't want to give her the opportunity you're I want you to get really clear what you're saying I don't have.

724

01:40:57.540 --> 01:41:07.260

Stephanie Bogan: The opportunity to the next level job that she has indicated to me that she can do and as to date her performance has been right pretty darn good because i'm.

725

01:41:07.710 --> 01:41:15.930

Stephanie Bogan: i'm so uncertain, I have this feeling or story or something around the hours that like I can't like you notice Those are two entirely different things.

726

01:41:18.510 --> 01:41:26.910

lorie scheibel: Right, I know doesn't make any sense but because, and I, and I, and I, I need to I need more transparency, I think the bottom line is I have got to have.

727

01:41:27.180 --> 01:41:33.900

lorie scheibel: Some sense of it, and the fact that she's unwilling to give it to me that I just think that it's not a good working relationship going forward.

728

01:41:34.020 --> 01:41:35.730

lorie scheibel: Well, always going to be a problem.

729



01:41:35.760 --> 01:41:42.600

Stephanie Bogan: This is a great example of fit maybe she's just at a place in her life, where she's like i've got X number of clients.

730

01:41:42.900 --> 01:41:54.450

Stephanie Bogan: Right I get my predictable revenue if it varies a little bit But, all in all everybody's happy and I just don't want to do time tracking life it's just not worth it to me because i'm multitasking and i'm efficient and as a result.

731

01:41:54.810 --> 01:42:04.080

Stephanie Bogan: You know, should they pay me to sit on the phone for an hour, if I can literally be on the phone doing lori's thing right I don't want to charge lori like I can see the logic there.

732

01:42:04.350 --> 01:42:14.760

Stephanie Bogan: mm hmm it's more of a hey you know, like it's going to Evan flow a bit your job in that model, by the way would be to have given her a lot more along the way, not to feel guilty about not knowing.

733

01:42:16.560 --> 01:42:29.070

Stephanie Bogan: right because that's what you're saying you're saying I feel guilty about it so i'm not when right from a business perspective or start first step to break we go back to clarity what I need to understand this, if I can understand this, then this works for me, or it doesn't.

734

01:42:33.810 --> 01:42:34.590

lorie scheibel: make sense.

735

01:42:35.640 --> 01:42:38.610

Stephanie Bogan: Which is entirely separate from can she do the job.

736

01:42:39.600 --> 01:42:49.740

lorie scheibel: I don't here's The other thing is i'm not a my model is so very different it's so much more hands on than the other two eight folks she works for one guy she just as a whole bunch of American funds.

737

01:42:49.740 --> 01:42:57.540

lorie scheibel: Processing paperwork and another guy she just does you know so and but I asked her to do all sorts of things I want her to be involved with the clients.

738

01:42:58.020 --> 01:43:02.160

lorie scheibel: And it's very different, and I think it's different than anything she's ever done and so.

739

01:43:02.670 --> 01:43:09.150

lorie scheibel: And then I wonder will maybe as part of this fork in the road, I have already given her the job description, maybe we do take.



740

01:43:09.750 --> 01:43:20.400

lorie scheibel: The disc test or one of those other tests to just really see maybe she's just a house cat that needs to be fed work to do, and she does it very well she's very serviceable in that regard, maybe that's it.

741

01:43:20.790 --> 01:43:33.420

Stephanie Bogan: The person that you're expecting it has to be a driver, they have I promise you every single time they have to be someone who is score is above the line because drivers are the people who take action with out impetus.

742

01:43:34.050 --> 01:43:42.390

Stephanie Bogan: it's ditch just a thing that some people have is and there's no right or wrong, like you need all types right if we were all like that it would be a crazy crazy world.

743

01:43:43.470 --> 01:43:44.910

Stephanie Bogan: Truly right.

744

01:43:45.150 --> 01:43:58.710

lorie scheibel: And so it's probably less I think it's my intuitive sense that she's not a driver, and so I have to constantly be giving her giving her giving her giving her and to be honest it's exhausting trying to manage giving constantly giving people.

745

01:43:58.710 --> 01:44:02.010

Stephanie Bogan: Work if you have any point, you need anytime you're using in.

746

01:44:02.100 --> 01:44:10.500

Stephanie Bogan: integrate whether they're your staff or virtual staff, you need a tracking and accountability mechanism, whether it's your client spreadsheet whether it's a sauna, which is what I like but.

747

01:44:10.950 --> 01:44:18.090

Stephanie Bogan: it's about having some way to you know tiffany put a quote in the chat that I really always love, which is the system has to be stronger than the task.

748

01:44:18.720 --> 01:44:28.350

Stephanie Bogan: And if they're just people just have tasks, then you're managing them right then it's you babysitting and did this get done and that's why we need those systems and the workflows and the things will continue to talk about.

749

01:44:28.920 --> 01:44:33.480

Stephanie Bogan: Because, then you have transparency, which is what you need for them the accountability.

750

01:44:34.770 --> 01:44:45.750

Stephanie Bogan: And that's where I think your breakdown is is re like there's that issue around the accountability and



and the lack of conversation around it to date has just created this momentum.

751

01:44:46.140 --> 01:44:56.310

Stephanie Bogan: where you want her to be the one to step up you're not sure if you can trust her is what I really hear you saying, and you can't like that's the breakdown, you cannot put someone in a role, my world role.

752

01:44:56.670 --> 01:45:04.500

Stephanie Bogan: If you don't fundamentally trust them, based on the experience you've had to date right wrong or indifferent that's that's the leap, you need to ask yourself if you can make.

753

01:45:05.640 --> 01:45:13.770

Stephanie Bogan: Can you have the conversation with her honestly about why the hours thing matters to you like just say hey this is kind of starting to bother me and I want to have an honest conversation with you about it.

754

01:45:15.120 --> 01:45:17.550

lorie scheibel: i've said it i've said it pretty much like that.

755

01:45:17.910 --> 01:45:18.750

lorie scheibel: Yes, last week.

756

01:45:18.810 --> 01:45:23.790

Stephanie Bogan: Well then, just have the practical conversation right returning the wheel from feeling to functional, which is.

757

01:45:24.150 --> 01:45:36.900

Stephanie Bogan: I need this information in order to plan my business, can you please give me some sense, on average, of the hours that you have worked on my behalf, and if you can't I think you have your answer yes, I think so.

758

01:45:36.990 --> 01:45:37.890

lorie scheibel: Okay, thank you.

759

01:45:39.270 --> 01:45:39.900

Tiffany Charles: Does that help.

760

01:45:40.230 --> 01:45:44.940

Tiffany Charles: And some feedback in the in the chat and we have one minute lori I don't know if you saw it, but.

761

01:45:45.720 --> 01:45:56.280

Tiffany Charles: A couple of people are like it really sounds like it's an in house employee or role that you're looking for because there seems to be a lot of trust equity relationship client relationship equity that.



762

01:45:56.520 --> 01:46:11.850

Tiffany Charles: needs to be built there, and so, possibly the friction is that what was once outsource makes sense to be in sourced so I just thought that was valuable feedback from Cathy and Joseph and as you're exploring that and thinking about that really letting that set in yeah.

763

01:46:12.720 --> 01:46:25.200

Stephanie Bogan: yeah rolling your world and managing so to tiffany's point you'll need that system in place if they're going to break tasks is very different than system is very different than manage me and make sure i'm moving right that the trains running on time for me.

764

01:46:25.920 --> 01:46:29.160

Stephanie Bogan: Thank you you're welcome, and it was great Point two things.

765

01:46:30.420 --> 01:46:42.930

Stephanie Bogan: Alright, so have all of you picked up something or set down something picked up something that will help you have the next level of your breakthrough, even if it's just that next conversation with a vendor or an assistant or a partner.

766

01:46:44.970 --> 01:46:49.050

Stephanie Bogan: is going to drop some things in the chat that you have picked up or set down today.

767

01:46:56.610 --> 01:46:59.880

Stephanie Bogan: We have today, Mary what have you picked up or sat down today.

768

01:47:02.640 --> 01:47:12.510

Mary Voll Miller: i'm going to have my new OPS person do the disk strength Finder and colby test, so we know what to best off.

769

01:47:14.730 --> 01:47:15.360

Mary Voll Miller: Put to hurt.

770

01:47:15.930 --> 01:47:22.560

Stephanie Bogan: Do you do you guys want me to queue up one of the calls or a tribe talk on the profiles and walking.

771

01:47:22.590 --> 01:47:23.700

Stephanie Bogan: Through in general.

772

01:47:24.810 --> 01:47:26.850

Tiffany Charles: Okay, oh valuable all right.



773

01:47:27.720 --> 01:47:30.810

lorie scheibel: If you if you could choose one which would you choose.

774

01:47:31.020 --> 01:47:32.220

Stephanie Bogan: I would choose disk.

775

01:47:32.520 --> 01:47:34.440

Stephanie Bogan: they're all dead, but i've used this for.

776

01:47:34.440 --> 01:47:48.390

Stephanie Bogan: so long that I can just look at it and be like yep nope here's exactly what you expect they all measures like called these Quick Start is disc CD I really do like strength finders there's some really cool stuff around it.

777

01:47:49.410 --> 01:47:57.420

Stephanie Bogan: But I personally like this because I just I know it's so well, and because it's different there's different versions of it, but it does the motivators and values.

778

01:47:57.840 --> 01:48:02.610

Stephanie Bogan: And I find that incredibly useful so, for example, I am.

779

01:48:03.540 --> 01:48:08.820

Stephanie Bogan: I am a socially I mean utilitarian social in my values so there's like six core values aesthetic.

780

01:48:09.090 --> 01:48:16.890

Stephanie Bogan: Knowledge like my husband loves to learn thing for the sake of learning, I am not that person and utilitarian and by utilitarian it doesn't mean making money, it means Roi.

781

01:48:17.520 --> 01:48:24.540

Stephanie Bogan: Like I love knowledge that's useful or interesting to me, but I don't just like my husband is like he knows everything about everything I don't understand I don't know how.

782

01:48:24.960 --> 01:48:31.020

Stephanie Bogan: But he could literally be in a conversation and brand freaky and brand ricky could pick anything and my husband would be like oh blah blah blah blah blah.

783

01:48:31.440 --> 01:48:34.920

Stephanie Bogan: And I would be like five minutes into that would be like that useful to me gotta go by.

784



01:48:35.430 --> 01:48:43.950

Stephanie Bogan: So, like it's just something I know about myself like right i'm all about the return, not necessarily in a monetary sense, but the things that are motivating to me.

785

01:48:44.520 --> 01:48:53.760

Stephanie Bogan: i'm also social high social, which means I really do genuinely love care about want to help people and puppies and all that other stuff.

786

01:48:54.750 --> 01:49:05.760

Stephanie Bogan: But i'm a high utilitarian, which is why I am not out making money that's for a living right like it literally is like your value system and my utilitarian is right here.

787

01:49:06.360 --> 01:49:12.810

Stephanie Bogan: And my socials right here they're like literally two points apart, which basically means as long as my needs are met.

788

01:49:13.260 --> 01:49:18.780

Stephanie Bogan: I will love all over you support you take care of you, I feel really like i'm not getting a return.

789

01:49:19.350 --> 01:49:25.740

Stephanie Bogan: i'm out so my husband went to Ethiopia, for he was pisco for a year before we were married and he was there for three months.

790

01:49:26.520 --> 01:49:35.310

Stephanie Bogan: And he was like wow okay i'm trying to make like it's not real, there are other factors right but it's there were people who will do that for 27 years and I love those people.

791

01:49:35.790 --> 01:49:48.630

Stephanie Bogan: Truly Somebody needs to do that, but but it's but like I need to see the return right, so it tells it like it shows up in different ways in your life here's an example of how it shows up for me and it matters in terms of how you lead.

792

01:49:49.710 --> 01:49:59.760

Stephanie Bogan: I the disk became so clear to me i'm when i'm going to save the story and we're on time and i'm going to stay on time and i'm going to save the story about the airplane and disk because it's a really good story.

793

01:50:00.720 --> 01:50:06.510

Stephanie Bogan: it's like literally I was in an airplane, this is the teaser and something happened and I was like oh.

794

01:50:08.040 --> 01:50:15.090

Stephanie Bogan: So that so explains my personality perfectly so i'm going to tell you the airplanes through when we do the disc call that will that will get you there.



795

01:50:15.840 --> 01:50:18.990

Stephanie Bogan: But we can talk through any of them, they are very similar so.

796

01:50:19.500 --> 01:50:31.020

Stephanie Bogan: they're also not terribly expensive So even if you have historically you something else I think they're like \$40 a pop or something online, so you know if you want to kind of go through, and I can focus on disk you guys, we can do that as well.

797

01:50:31.560 --> 01:50:42.360

Tiffany Charles: And, just to be clear, though, I really love the version that stuff had us do there's different versions of desk like there's different vendors, so it was the TT I success insights.

798

01:50:42.540 --> 01:50:53.760

Tiffany Charles: Yes, CTI talent insights desk because it gave you so much more than just your profile it really gave into like your weaknesses and your strengths and your opportunities, so it was.

799

01:50:54.060 --> 01:51:02.910

Tiffany Charles: It worked really well reason I like this we've done myers briggs we've done colby we've strength finders and.

800

01:51:03.690 --> 01:51:05.910

Tiffany Charles: and different TEAM members have done different things.

801

01:51:06.390 --> 01:51:14.970

Tiffany Charles: disc was one thing that our team easily picked up like it was really like it's just so like it was just so easy for them to connect to it were like.

802

01:51:15.330 --> 01:51:24.270

Tiffany Charles: You know myers briggs there's like 16 of them and I don't know the difference of an ICP whatever F versus an E and F J right like that's hard for me.

803

01:51:24.480 --> 01:51:34.290

Tiffany Charles: I now know the difference between a di sc like no problem so that's really important as you're looking to use it as a tool, or a collaboration, because it, it makes it easy.

804

01:51:35.490 --> 01:51:52.980

Tiffany Charles: And so that's what I like about disc I know myers briggs has like the protagonist and like somewhat the avatars too, but that's what I liked about it, and so I think you'd like that cheap but that particular test stuff was much better than a disc i've taken in the past for sure.

805

01:51:54.090 --> 01:52:02.610

Stephanie Bogan: yeah that's why the there there's like versions of it and not end the standard difc doesn't give you



the motivators and and values piece.

806

01:52:03.870 --> 01:52:11.910

Stephanie Bogan: So keep that in mind we'll make sure we get that information all for you, for the call and we'll put that in inbox and i'm trying to make sure that you guys have access to that so.

807

01:52:12.450 --> 01:52:19.680

Stephanie Bogan: It really what you notice we're talking about it's personal energy and then it's team energy that's what momentum is right, can we align it.

808

01:52:20.160 --> 01:52:38.580

Stephanie Bogan: Can we create awareness around it, can we align it and can we create action around places where those gaps in terms of role in terms of leadership right the a's that we went through awareness accountability etc So hopefully the point today was to just really ground you in the idea.

809

01:52:39.600 --> 01:52:49.260

Stephanie Bogan: That sometimes we're holding on to things and in this, you know, since we're on productivity and today we were really focused on the human and the people side of it is what are the things that we're holding on to.

810

01:52:49.800 --> 01:52:57.990

Stephanie Bogan: Is that our time, is it not delegating is it on having the tough conversation right, is it not creating the training programs like we covered a lot of ground today, if you think about it.

811

01:52:58.860 --> 01:53:04.440

Stephanie Bogan: And then, what is something that you can pick up when you set that down what will you pick up lori.

812

01:53:05.280 --> 01:53:14.790

Stephanie Bogan: right when you sit down, not having the conversation and not getting clear and not moving right through this person and taking a process to move through this person, whatever the outcome, what will you pick up.

813

01:53:17.430 --> 01:53:18.090

Stephanie Bogan: you'll pick up.

814

01:53:18.390 --> 01:53:18.960

Stephanie Bogan: Right all.

815

01:53:19.200 --> 01:53:21.270

lorie scheibel: things that have been put down.

816

01:53:21.330 --> 01:53:29.130

Stephanie Bogan: Because i've been at some point you in the right direction and say here's what i'm wearing about



and you're like it's that feeling that you're after that someone else is taking agency of things.

817

01:53:29.370 --> 01:53:42.060

Stephanie Bogan: So you can truly focus on the things that you love and are you know whatever's on your calendar that day and that you don't have to worry about the background noise that's an amazing feeling I promise you guys like you want that for yourself it's the best.

818

01:53:43.590 --> 01:53:46.710

Stephanie Bogan: So, what are you willing to sit down to move in that direction.

819

01:53:47.280 --> 01:53:57.270

Stephanie Bogan: Regardless of your size, if you are on your own it means your your assistant that two hours that you block out a day or a day a week remember like that's my consistent advice, there is.

820

01:53:57.660 --> 01:54:08.730

Stephanie Bogan: Block yourself off as your team until you have one and then treat yourself the same way, what can I do in this hour and a half to make sure that when I look at my calendar tomorrow everything I need is there and prepped.

821

01:54:09.480 --> 01:54:15.840

Stephanie Bogan: Right, so that way when you do that for yourself, you know exactly what you're training that person to it's why i'm so good at it.

822

01:54:16.050 --> 01:54:25.590

Stephanie Bogan: I started my career as a receptionist and then I was a legal Secretary, and I was really good at you had to manage a lot of stuff and I was in a firm, we had to manage a lot of stuff and i'm really good at managing lots of details.

823

01:54:26.280 --> 01:54:30.450

Stephanie Bogan: Right and so as you do that, like once you know what you want.

824

01:54:31.500 --> 01:54:40.320

Stephanie Bogan: And if you haven't done the job, by the way, it's harder but it's about the experience you want to create lori and Jay and Mary and Ryan and Jill like.

825

01:54:40.650 --> 01:54:44.610

Stephanie Bogan: that's what should show up on the job description what's going to give me the experience that I want.

826

01:54:45.210 --> 01:54:56.610

Stephanie Bogan: So that is your invitation this week is to ask yourself, where, am I in my breakthrough, what can I sit down and what does that create space for me to pick up as they work on being just a little bit more limitless.



827

01:54:57.720 --> 01:54:59.190

Stephanie Bogan: But today's call hopefully you guys.

828

01:55:01.530 --> 01:55:11.160

Stephanie Bogan: Alright, so I know we want to talk more about managing people problems and priorities and those profiles so allison they were just talking about that release it will make sure those are in the schedule and.

829

01:55:11.640 --> 01:55:21.690

Stephanie Bogan: tiffany i'm sure we'll ask you if your schedule allows to join us for that one, since you have used it so much and so well, and with that I will bid you all a good day.

