

LIMITLESS Coaching Call Transcript

AUGUST 23RD, 2021
LIMITLESS COACHING CALL
MANAGING PEOPLE, PRIORITIES & PROJECTS

44

00:09:07.740 --> 00:09:19.260

Stephanie Bogan: Are right okay everybody, this is our August limitless coaching call today, we are going to talk about one of my favorite topics, because it is so critical to your success.

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00:09:19.560 --> 00:09:28.740

Stephanie Bogan: Be on the actual core work you do running your business and marketing your business and hiring your people you do this thing called run the shop.

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00:09:29.250 --> 00:09:35.220

Stephanie Bogan: So there's a whole system of workflow of how do you process work as you run the shop.

47

00:09:35.520 --> 00:09:43.920

Stephanie Bogan: And then there's right the growth and development, what do you do to manage how you change and grow and develop as you focus forward so.

48

00:09:44.130 --> 00:09:51.000

Stephanie Bogan: This is one of those in between lessons that that you won't necessarily get in a lot of other places, but it is so important.

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00:09:51.390 --> 00:09:59.400

Stephanie Bogan: And i'm super excited to talk to you about it, because a couple of things one just just our businesses is grown and scaled and I have done this cycle many, many times.

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00:09:59.790 --> 00:10:06.810

Stephanie Bogan: there's a curve and i'm going to we're going to talk to you about that, but this is one of those things that you're going to solve for no matter who you are how big you are.

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00:10:07.350 --> 00:10:15.660

Stephanie Bogan: If you want to run the shop more efficiently and effectively, and if you want to continuously be focused forward you're going to want to find a way to manage your people.

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00:10:15.960 --> 00:10:28.470

Stephanie Bogan: Your projects and your priorities in a way that utterly aligns with your goals makes the best use of your time and talent and all of your capital your people, your money your resources your tack.



53

00:10:29.190 --> 00:10:41.640

Stephanie Bogan: Right, the consultants and the vendors that you use so that all of that investment is harnessed really clearly in the direction of helping you manage change, which is what we're really talking about here.

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00:10:42.240 --> 00:10:44.760

Stephanie Bogan: When we talk about managing people process and priorities.

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00:10:45.090 --> 00:10:51.810

Stephanie Bogan: So I am super pleased to have a guest with me today who's our a sauna consultants, so this is the person that we call and we go.

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00:10:51.990 --> 00:10:59.550

Stephanie Bogan: Staff really wants this stuff to be high and tight and we're really tired of listening Jericho, what about what about what about we call time.

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00:10:59.820 --> 00:11:05.070

Stephanie Bogan: So when I sat down, I was like oh we're just gonna have time come during the call with us and kind of walk through.

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00:11:05.340 --> 00:11:12.450

Stephanie Bogan: The different ways that a sauna, in particular, but ultimately right just the idea of how you manage people projects and priorities.

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00:11:12.750 --> 00:11:19.170

Stephanie Bogan: And we really want to show you some of our favorite tech that that we use and a lot of you use and a lot of our clients use.

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00:11:19.530 --> 00:11:28.170

Stephanie Bogan: That we didn't have five seven years ago, like we literally todd's nodding like spreadsheets you have a sample in the workflow like it's there if you need it.

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00:11:28.560 --> 00:11:34.620

Stephanie Bogan: But the shortcut is correct, do not pass go collect \$200 skip the spreadsheet go to a tool, like a sauna.

62

00:11:35.430 --> 00:11:48.360

Stephanie Bogan: trial Oh, some of you have done the salesforce right, but the idea is to really make sure that you're leveraging the technology to support you so Todd will join us and really walk you through how a sauna as a project management tool can do that.

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00:11:49.350 --> 00:11:53.040

Stephanie Bogan: So you guys, as always drop your questions are we doing this later today allison.



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00:11:54.780 --> 00:11:55.770

Stephanie Bogan: where's the chat box.

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00:11:56.100 --> 00:11:59.550

Stephanie Bogan: Yes, alright so after questions and slide Oh, as always.

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00:12:00.420 --> 00:12:10.110

Stephanie Bogan: here's it here's what I want you to know, because we talk about it all the time, but what you'll notice is that i'm always giving you models, and by that I mean success leaves clues.

67

00:12:10.500 --> 00:12:19.980

Stephanie Bogan: there's a science to it right there's there's actual science around mindset there's business science there's performance science and then there's this thing we like to call best practices, which is.

68

00:12:20.370 --> 00:12:27.990

Stephanie Bogan: If you do this not once in your practice or not even as an advisor and some great advisor coaches out there not knocking them at all.

69

00:12:28.620 --> 00:12:37.650

Stephanie Bogan: But when you do it once you're doing it your way, and what we have the luxury of seeing having done this for 2829 years now, is right 1000 different ways.

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00:12:38.010 --> 00:12:46.590

Stephanie Bogan: And then pulling back, which is my favorite thing to do and saying as a look at this sea of stuff which is overwhelming, how do we bring.

71

00:12:47.070 --> 00:12:58.080

Stephanie Bogan: Clarity and transparency and accountability to the process because that's the core lesson you think about managing growth and development, what you're really talking about.

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00:12:59.010 --> 00:13:09.810

Stephanie Bogan: What you're really discussing is the single hardest thing that you do as a human being, which is manage change.

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00:13:10.800 --> 00:13:21.360

Stephanie Bogan: And if you're really lucky you get to manage people while managing change which holy moly is even better, I was talking about Michael this morning allison and I.

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00:13:21.720 --> 00:13:30.000

Stephanie Bogan: were preparing for the summer series on Wednesday and the growth retreat next month, and we



were talking about the marketing study and the well being study.

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00:13:30.840 --> 00:13:34.650

Stephanie Bogan: The deeper version of which came out this morning, and he and I will be talking to you about September.

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00:13:35.040 --> 00:13:45.420

Stephanie Bogan: But generally speaking, what we found is that there is a correlation between growth and happiness, but only when it really aligns with your goals and Lo and behold the limitless model.

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00:13:45.720 --> 00:13:55.620

Stephanie Bogan: Of knitting and fewer hours is right highest happiness, of all people in the study are literally the things that you're learning here, but to do that.

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00:13:55.890 --> 00:14:00.210

Stephanie Bogan: Whether you're you or Bob down the street is, you have to manage change that's.

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00:14:00.510 --> 00:14:08.130

Stephanie Bogan: What more and better means if you're that person that's like hey I know that more as possible, I know I can be more efficient, I could be more effective, I can market better.

80

00:14:08.340 --> 00:14:18.870

Stephanie Bogan: and get my team on board I just got to figure out what all this stuff in the background is that's what you're here for when you pull all of them back the theme that I want you to take away is.

81

00:14:19.260 --> 00:14:26.640

Stephanie Bogan: The model for successfully managing and sustaining change, which is what we're talking about we talked about growth and development.

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00:14:26.970 --> 00:14:34.890

Stephanie Bogan: Revenue goals personal goals right you're always in a firm, you have had your morpheus moment, whether you like it or not.

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00:14:35.370 --> 00:14:45.660

Stephanie Bogan: Which is you took the red pill, and the red pill says, I run a practice and i'm in charge of all this stuff and I joined limitless and now I know I know about mapping and mindset and methods on momentum.

84

00:14:45.960 --> 00:14:54.990

Stephanie Bogan: And i'm going to walk into this office every single day and i'm going to think and act differently, because what I know is that i'm in the business of managing change for my clients.

85



00:14:55.650 --> 00:15:07.950

Stephanie Bogan: And I want you to think about that, like all the research says all of your experiences say that the portfolios and the planning are super important but your job, your real value.

86

00:15:08.550 --> 00:15:17.040

Stephanie Bogan: is to weave people through the plans and the process and the portfolio data, so they know what it means to them.

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00:15:17.970 --> 00:15:25.740

Stephanie Bogan: And that's what we're talking about we're talking about managing change internally is doing the same thing with ourselves and our team, which is.

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00:15:25.980 --> 00:15:33.870

Stephanie Bogan: What do you do with a client you give them clarity what's the goal what's the outcome that you want to create you give them transparency years that we need to do here's the process for doing it.

89

00:15:34.230 --> 00:15:41.340

Stephanie Bogan: And then you give them accountability here's what your next steps are here's what my next steps are right john that's what we do right path that's what we do.

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00:15:42.390 --> 00:15:48.750

Stephanie Bogan: When we want to create that kind of relationship internally we interestingly don't apply the same model.

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00:15:49.110 --> 00:15:57.480

Stephanie Bogan: This is the model, it will work for you, for the rest of your life if you have these three ingredients in managing change one clarity.

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00:15:57.990 --> 00:16:06.810

Stephanie Bogan: What are we managing to and why, and I don't mean clarity, like Todd needs to know I mean Todd and his entire team needs to know I don't mean Brian needs to know.

93

00:16:07.110 --> 00:16:17.250

Stephanie Bogan: I mean, Brian and his entire team needs to know what are we doing and why because that gives you the guard rails for like the average IQ my kids pulling right, and they can this 10.

94

00:16:17.580 --> 00:16:28.860

Stephanie Bogan: If they weren't for me, I promised them to be simpler, that the bumper guards friends laughing at me right, those you know that they put in the they're not even like it's not even old school now like they're just like things that pop up it's totally idiot proof.

95

00:16:29.550 --> 00:16:40.320

Stephanie Bogan: And it keeps the ball in in the rails and that's what we're going to talk about today, how do you



manage change and create those guardrails his bumper guards for yourself just like we talked about for clients.

96

00:16:40.590 --> 00:16:50.910

Stephanie Bogan: so that you know that things are the right things are in motion and on track in there in this channel and then your job, remember that fourth m momentum.

97

00:16:51.300 --> 00:17:00.780

Stephanie Bogan: is to make sure that the pace of change aligns with your goals and priorities that does not mean that you have to kill yourself and it doesn't mean you're lazy snail it means you find that.

98

00:17:01.050 --> 00:17:07.290

Stephanie Bogan: That momentum point in between, which we talked about a lot here and then time Eric and talk about how to bring structure to that.

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00:17:07.950 --> 00:17:13.050

Stephanie Bogan: So that's The goal is, I want you understand that those three variables will without fail.

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00:17:13.440 --> 00:17:30.450

Stephanie Bogan: Every single time i've done this and solos i've done this and bazillion dollar firms, if you have clarity, you have transparency that's who's doing what when why and how this is like a thing with me ask my team allison how annoying Am I it's Okay, you can be totally honest here.

101

00:17:31.260 --> 00:17:32.070

Allison: Persistent.

102

00:17:32.610 --> 00:17:42.780

Stephanie Bogan: I am percent look at that, like, I remember anybody here take piano any piano take takers you john Noah What did the piano teacher tell you about your risk in piano.

103

00:17:44.760 --> 00:17:45.300

John Nowak, CFP?, RMA?, CPA: i'm.

104

00:17:46.110 --> 00:17:48.480

John Nowak, CFP?, RMA?, CPA: Rich young ruler, I guess, keep keep your.

105

00:17:48.480 --> 00:17:48.900

Remember.

106

00:17:50.070 --> 00:18:02.010

Stephanie Bogan: I don't play piano well, by the way, cuz I have a piano class, but I remember, because you know it was risa risk up because you can't you can't play excellent piano with flat wrist.



107

00:18:02.430 --> 00:18:13.200

Stephanie Bogan: You join this program to ditch your flat wrists, and that means that there's a discipline to success it's new and it's uncomfortable and it starts with.

108

00:18:13.470 --> 00:18:25.740

Stephanie Bogan: You and that's why we're doing this lesson is asked Allison asked Lisa asked me, and I am the most annoying person on the planet, when I when we're getting to the bar of excellence, which is the bar.

109

00:18:27.180 --> 00:18:36.300

Stephanie Bogan: Which is great and it's a work in progress for us to where like we're not at my bar right but we're working towards it continuously that's the goal, which is.

110

00:18:36.750 --> 00:18:43.560

Stephanie Bogan: If you know what you're doing and why, and you know what the priorities are who's doing what.

111

00:18:44.190 --> 00:18:52.860

Stephanie Bogan: By when and then you create a system, a system keyword system not instinct not feel like remembered today system.

112

00:18:53.340 --> 00:18:59.640

Stephanie Bogan: For some of us that's hard, by the way, because we're not systems wired but I were results wired and that's the thing you're going to kick into here.

113

00:19:00.330 --> 00:19:13.260

Stephanie Bogan: Is accountability, and when you put those three things together, this was like a total like you know I love alliteration and acronyms, but this does not happen on purpose, what is the acronym for clarity, transparency and accountability.

114

00:19:15.240 --> 00:19:22.920

Stephanie Bogan: cta and top of the cta stand for in the world, oh project management and marketing call to action right.

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00:19:22.980 --> 00:19:31.110

Stephanie Bogan: Call to Action yeah that's right, so this is where I did not make that up, but that is literally what I realized is this is your call to action formula.

116

00:19:31.950 --> 00:19:41.040

Stephanie Bogan: All of you are here to do one thing one thing only if you're clear on this and you get a system around it you're going to kill it.

117

00:19:41.460 --> 00:19:48.480



Stephanie Bogan: And that is managing change because when you came here, you said there's more in a better that calls me and I want it, by the way.

118

00:19:48.690 --> 00:20:02.040

Stephanie Bogan: kids to study says that you guys are 100% on point no joke allison we went through the data points today and everything that limitless lifestyle is about the highest well being scores in the profession.

119

00:20:02.790 --> 00:20:08.190

Stephanie Bogan: niche 30 hours a week, know that guy Kenny, I getting make this stuff up, I was like my face like I know.

120

00:20:08.730 --> 00:20:18.930

Stephanie Bogan: Ray so you guys are on the right track it doesn't work if you don't do it and you guys know I am all about getting shit done Todd welcome to our world we get to do that here.

121

00:20:19.320 --> 00:20:33.270

Stephanie Bogan: So this is what this is about one people you are not alone, you will never ever ever reach your peak of success with that at least one person per time to help you because it's all about leverage.

122

00:20:33.750 --> 00:20:39.330

Stephanie Bogan: So any stories, you have in your head, you call me we're going to sort that out that's not the focus today it's about a system.

123

00:20:39.570 --> 00:20:47.850

Stephanie Bogan: for managing the people that you have, and for those of you and there's a lot of you that have 345678 plus people this becomes incredibly important.

124

00:20:48.540 --> 00:20:57.030

Stephanie Bogan: For those of you, with fewer people no less important, because it means that there's just a it's easier there's a direct line of sight between you and everybody there's nowhere to hide.

125

00:20:57.450 --> 00:21:08.130

Stephanie Bogan: But the process is the discipline that you want to instill even if it's you and a part time assistant 10 hours a week, this is the process right so Todd will talk to you about.

126

00:21:08.400 --> 00:21:22.200

Stephanie Bogan: Big firm small firms it's about a system for success, so the lessons that apply to this right rockstar right hand building and managing teams, but really it's about how do you institutionalize the business.

127

00:21:22.590 --> 00:21:29.280

Stephanie Bogan: When I sold corner of his I sold it for between you and I, in the fence post I can't tell you, because they signed a non confidentiality, accompanied by agreement.



128

00:21:29.580 --> 00:21:41.970

Stephanie Bogan: But I will tell you, so I sold it for a ridiculous multiple, as I have done with clients and I just told you guys I just turned on an offer again to buy limitless for ridiculous multiple turned it down why.

129

00:21:43.590 --> 00:21:56.520

Stephanie Bogan: Why, because we know how to create change that creates results, and when you do that in your organization you lever your value exponentially when you institutionalize.

130

00:21:56.820 --> 00:22:01.860

Stephanie Bogan: Your secret sauce it's what I call scaling special and that's what we're really good at here.

131

00:22:02.430 --> 00:22:08.880

Stephanie Bogan: Which is Andrew Steve can't know like John you guys have to differentiate yourself in the marketplace in a really compelling way.

132

00:22:09.360 --> 00:22:20.430

Stephanie Bogan: And everything that you need to do that and build according to the kids to study a \$1.5 million hi what I call a happy high performing like right there at the absolute you're setting the bar.

133

00:22:20.730 --> 00:22:28.800

Stephanie Bogan: In the outlet as as that top performing outlier in the study like that's where you're at, and it means that you have at least some people leveraging you.

134

00:22:29.580 --> 00:22:41.280

Stephanie Bogan: Because that's what's necessary to get your time and talent working to the utmost, it does not mean you need 12 people and big complex ugly organization doesn't mean that the data actually shows that it declines after that point.

135

00:22:42.180 --> 00:22:48.720

Stephanie Bogan: Literally all the way up to \$5 million happiness to client because they they're not applying lessons that you have so one is people.

136

00:22:48.990 --> 00:22:56.070

Stephanie Bogan: To his priorities so we're going to talk about this process of how do you set priorities in the vision lesson the model practice the time lesson.

137

00:22:56.430 --> 00:23:09.450

Stephanie Bogan: that's not this conversation, this is the once you've set your priorities, how do you manage the heck out of them, so that the things that you have intentionally keyword intentionally.

138

00:23:09.750 --> 00:23:14.010

Stephanie Bogan: chosen to direct your time and attention and energy and resources to.



139

00:23:14.400 --> 00:23:21.960

Stephanie Bogan: that you have a way to put a box around that and manage it down the assembly line so that you get the result that you want, and that leads to accountability.

140

00:23:22.320 --> 00:23:33.510

Stephanie Bogan: Which is the action and accountability lesson and over X prize this one right here so with that I really just want to lay the groundwork for are you in a place where, as you sit right now.

141

00:23:34.200 --> 00:23:40.800

Stephanie Bogan: And you think about change, some of you are like all of you in general are kicking butt and taking names go you.

142

00:23:41.130 --> 00:23:45.930

Stephanie Bogan: And there's always still that feeling of there's so much I should be doing more and overwhelm.

143

00:23:46.200 --> 00:24:02.310

Stephanie Bogan: And that says that there's a story in your head, that is competing with your system, because if you have a system for managing your people, selecting your priorities and creating accountability that feeling of overwhelm will not.

144

00:24:03.090 --> 00:24:09.060

Stephanie Bogan: I know this is challenging for some of you, but I really want to check in it will not be present on a daily weekly, monthly basis.

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00:24:09.480 --> 00:24:24.660

Stephanie Bogan: Because the system means everything goes in there's a way that it gets processed even you guys have heard me talk about the parking lot even things we don't do right now and what we want to do is peel back the curtain on how you make that happen, beyond this conversation so.

146

00:24:25.740 --> 00:24:34.500

Stephanie Bogan: With that i'm going to walk you through some very brief screenshots and then i'm going to turn it over to Todd and he's going to kind of walk you through a sauna and how it works, I want you guys to drop.

147

00:24:34.860 --> 00:24:42.450

Stephanie Bogan: As many questions you can decide Oh, because they'll enter them here and they'd be willing to bet if we asked really nice to be willing to answer any he can't after the fact.

148

00:24:43.440 --> 00:24:53.370

Stephanie Bogan: he's nodding, so i'm gonna go with yes alright so managing people processes and parodies means you have to be clear on the priorities, so in this example, if you look over here at the program weekly huddle.

149



00:24:53.700 --> 00:25:03.270

Stephanie Bogan: Or the team weekly huddle in program where you're going to see are these things, called Bigs this is real i'm not making that like these are actual port so right now we're working on.

150

00:25:03.600 --> 00:25:09.900

Stephanie Bogan: Our Member site build right 2022, these are not online, by the way, like you do do not get five Bigs to yourself.

151

00:25:10.410 --> 00:25:22.170

Stephanie Bogan: Right you think about the project management stuff that we teach you and planning and priorities, our Bigs are up here, so we never lose sight of what are the things that each of us are working toward to really not run the shop.

152

00:25:22.770 --> 00:25:27.390

Stephanie Bogan: move the needle in this business right we're redefining lifestyle next year.

153

00:25:27.660 --> 00:25:38.460

Stephanie Bogan: it's becoming a very virtual world we're looking at leaders like those are the biggies and then what's on this week's agenda, what has our attention right now is a team that supports run the shop and supports big.

154

00:25:39.720 --> 00:25:49.770

Stephanie Bogan: Totally show you some of the details, but the basic idea is it's all there I can look at it anytime there's governance every meeting everybody has the system for putting stuff in the board.

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00:25:50.280 --> 00:26:00.810

Stephanie Bogan: So it becomes a very integrated cohesive culture based system ask allison like what is the thing that I am constantly doing reset.

156

00:26:01.200 --> 00:26:12.810

Stephanie Bogan: it's so annoying i'm like you didn't have a next step, you didn't do this, you didn't do this, you gotta do and they're just like oh my God, but I promise you, when people leave, which they do at some point right they all call me, and you know they say.

157

00:26:13.650 --> 00:26:21.120

Stephanie Bogan: they're all rock stars, where they are they're all kicking butt they're like how am I going to run this place, the way that they do and i'm like you're not you're going to take everything I taught you.

158

00:26:21.510 --> 00:26:28.560

Stephanie Bogan: And you're going to go your rock Star and literally that i'm not kidding you I can't make this up it's the best compliment I can get.

159

00:26:29.280 --> 00:26:37.020

Stephanie Bogan: Everybody that moves on, is a rock star because they know how to manage work and priorities,



which is the thing.

160

00:26:37.290 --> 00:26:45.000

Stephanie Bogan: We all want we want stuff we want an idea to drop, we want the initiative machine we don't want the system we want the initiative machine.

161

00:26:45.240 --> 00:26:49.980

Stephanie Bogan: To take charge, sometimes we have those people sometimes we don't but what Todd and I are talking about is.

162

00:26:50.220 --> 00:27:00.870

Stephanie Bogan: How do you build an initiative machine, so that you get that no matter what, and then people layer into that too right you've got to have the right people to really take it up a notch.

163

00:27:01.260 --> 00:27:08.040

Stephanie Bogan: September retreat is here, oh look at all these tasks and who owns them and then by what and we've got all these great boards, you can look at.

164

00:27:09.180 --> 00:27:19.170

Stephanie Bogan: i'm not going to bore you with the details, but you can see, I have an engagement dashboard we know what your MPs scores, were we know who's in high gear, we know who's struggling we look at those reports every week.

165

00:27:19.590 --> 00:27:27.900

Stephanie Bogan: we've got our marketing dashboard here, so you can see right podcasts are purple writing is spread like I can literally look at what i've committed to.

166

00:27:28.350 --> 00:27:38.910

Stephanie Bogan: High Level from a public persona perspective which Lisa and then can manage we've got our event calendar, like all of our lessons are organized and detailed.

167

00:27:39.690 --> 00:27:47.220

Stephanie Bogan: So the marketing playbook is in here so i'm just giving you snapshots todd's going to do the walkthrough and you're going to translate it.

168

00:27:47.820 --> 00:27:55.620

Stephanie Bogan: And todd's going to translate it into what does it mean to you, your week the huddles or note right your client reviews and your weekly huddles are no different than ours.

169

00:27:55.920 --> 00:28:02.160

Stephanie Bogan: Your projects to work on your surface model are no different than my project to work on something else so.



170

00:28:02.460 --> 00:28:14.010

Stephanie Bogan: As we kind of do the the nuts and the bolts with Todd feel free to drop all your questions in there and then we'll talk about what we're going to do with that and we'll take it from there all right Todd.

171

00:28:15.390 --> 00:28:16.440

Stephanie Bogan: move forward.

172

00:28:18.750 --> 00:28:29.070

Stephanie Bogan: All right, i'm going to give Todd control of the screen but here's the level set here's what I want you to get really clear, we have all these resources in the library, for all the lessons and wherever we have.

173

00:28:29.460 --> 00:28:39.510

Stephanie Bogan: A manual resource, we give it to you because we want you to be able to apply the principles that we teach you, no matter what, there are no excuses in this place just results.

174

00:28:40.440 --> 00:28:44.700

Stephanie Bogan: And where ever possible, I am going to tell you.

175

00:28:45.510 --> 00:28:54.570

Stephanie Bogan: Honestly, indirectly, where you are going to not pass go not past \$200 spend your money and get your results right when it comes to people I have told you guys that story.

176

00:28:54.990 --> 00:29:07.380

Stephanie Bogan: I literally if I could go back and do it again I skimmed on those first few employees is like how cheaply, can you possibly get a human being to come into this office and work for you anybody with me on that one.

177

00:29:07.830 --> 00:29:14.130

Stephanie Bogan: Right, and you know what I learned, I learned that when you pay people peanuts, you get monkeys that's what I learned oh my God, I am not an exception to the rule.

178

00:29:15.030 --> 00:29:23.430

Stephanie Bogan: Literally if I could go back and do it again and i'm not saying you have to do this, but I want to really articulate the value of leverage.

179

00:29:23.970 --> 00:29:33.690

Stephanie Bogan: Which is if I could go back and do it again, I would literally have taken he locked out of my house to get the extra capital which wouldn't have been that much in there 10 or 15 grand a person.

180

00:29:34.170 --> 00:29:38.970

Stephanie Bogan: To get a completely kick ass or a unicorn rock star of a human being.



181

00:29:39.240 --> 00:29:50.490

Stephanie Bogan: That would have leveraged my time so much faster the time you spend managing mediocre people and being frustrated about it is ridiculous you don't have to be an amazing manager you don't want to suck.

182

00:29:50.970 --> 00:29:58.950

Stephanie Bogan: But you don't have to be amazing if you've got good systems and you've got a process for hiring someone that can manage you that's the goal so with that.

183

00:29:59.730 --> 00:30:06.300

Stephanie Bogan: i'm going to turn it over to Todd who's helped me take the ideas we have about process and workflows and translate that to our team.

184

00:30:06.660 --> 00:30:13.800

Stephanie Bogan: into dashboards and projects and workplace and you guys know I love marketing and relationships and client experience, but I am a complete geek.

185

00:30:14.130 --> 00:30:26.910

Stephanie Bogan: When it comes to efficiency and tech and automation so with that Todd i'm gonna let you take it away and show us how we can really bring this idea of clarity, transparency and accountability to our change process.

186

00:30:28.170 --> 00:30:32.370

Todd Cavanaugh: Alright sounds great well hey everybody my name's Todd been really looking forward to.

187

00:30:33.000 --> 00:30:44.760

Todd Cavanaugh: This meeting and getting a chance to talk with you guys i've had a chance to work with a lot of either consultants, or even recently financial advisor, especially with this tool, a sauna and so anyways i've been looking forward to it.

188

00:30:45.450 --> 00:30:58.740

Todd Cavanaugh: want to introduce my family real quick can see my lovely wife Elizabeth we actually got five kiddos we just moved over the weekend and so usually the reason I show this slide is because I am setting up my new Home Office and occasionally it sounds like.

189

00:30:58.980 --> 00:31:09.240

Todd Cavanaugh: there's some kind of human torture happening in the building, but I can assure you, everything is on the up and up over here we'll make sure we take care of that even though everyone's a little hyper from the move.

190

00:31:09.720 --> 00:31:17.610

Todd Cavanaugh: But yeah with that, let me just go in, and let me just say also right off the BAT here if there are any questions and comments I know stephanie already mentioned it.

191



00:31:17.880 --> 00:31:26.730

Todd Cavanaugh: start putting them in slide oh we'll do it hashtag whatever it was I can't remember, but you guys maybe allison can chime in just make sure we all got it.

192

00:31:29.580 --> 00:31:31.470

Todd Cavanaugh: Maybe Okay, I think it's going into zoom chat.

193

00:31:31.470 --> 00:31:33.960

Todd Cavanaugh: And then also i'm not sure Maybe you can.

194

00:31:34.140 --> 00:31:44.970

Todd Cavanaugh: help me out allison in terms of people just have comments and things you can put that into zoom chat I guess if it's not really a question a couple points I might be asking for feedback so that's fine.

195

00:31:44.970 --> 00:31:46.350

Todd Cavanaugh: too, if you want to do it that way i'll try.

196

00:31:46.350 --> 00:31:53.430

Allison: Sorry, I can double down the comments into the zoom chat and then any questions just put in slide oh calm hashtag good vibes.

197

00:31:54.090 --> 00:31:56.250

Stephanie Bogan: And i'm tired, I was just commenting we have a.

198

00:31:56.250 --> 00:32:01.560

Stephanie Bogan: coach and he has six kids he just he adopted three girls, a couple years ago.

199

00:32:01.800 --> 00:32:03.120

Stephanie Bogan: But I was joking dragon.

200

00:32:03.180 --> 00:32:04.020

you're getting five.

201

00:32:07.260 --> 00:32:09.720

Stephanie Bogan: Like room did we know that about you.

202

00:32:11.730 --> 00:32:14.580

Todd Cavanaugh: Alright, well, let me, let me, let me jump forward here so.

203

00:32:15.660 --> 00:32:27.330



Todd Cavanaugh: The number of years ago McKinsey prestigious management consulting firm they did a study on the average knowledge workers productivity alright so they're studying people like you and me and just what we do when we show up at work.

204

00:32:27.690 --> 00:32:32.370

Todd Cavanaugh: And if you have people on your team, my understanding is close to half of you have some kind of team with you.

205

00:32:32.610 --> 00:32:38.400

Todd Cavanaugh: And so what does that mean we show up at work here's what's happening so 28% of people's time.

206

00:32:38.670 --> 00:32:51.210

Todd Cavanaugh: is just dealing with email, so I don't know about you, if you've ever had those days, where it's three or 4pm and you're like what am I even done today, besides deal with email I get super frustrated by that and I imagine, many of you do as well.

207

00:32:52.200 --> 00:33:00.120

Todd Cavanaugh: And then we got 19% of people's time just finding the information you need So what does this look like this looks like.

208

00:33:00.900 --> 00:33:05.280

Todd Cavanaugh: You know hey hey Nick did you get that that you know the one report yeah.

209

00:33:05.580 --> 00:33:12.540

Todd Cavanaugh: No it's not in my email, let me forward you the three emails that I need to send you in order for you to kind of get up and know what in the world we're talking about and.

210

00:33:12.930 --> 00:33:22.800

Todd Cavanaugh: And where was that one was that in dropbox oh no that particular client, they are always using Google drive and you know just finding the stuff you need when you're ready to do things you know i'm talking about.

211

00:33:23.310 --> 00:33:30.750

Todd Cavanaugh: And then we got 14% of people's time which is just internal communication, so we got different names for this, a lot of times this is things like.

212

00:33:31.590 --> 00:33:35.070

Todd Cavanaugh: We call status update meetings or different things where.

213

00:33:35.400 --> 00:33:42.150

Todd Cavanaugh: We just in order, just to collaborate and beyond the same page, we have to spend time just in communication so.



214

00:33:42.360 --> 00:33:54.360

Todd Cavanaugh: You add all that stuff stuff up that leaves 39% of people's time for the actual work, the actual stuff that's moving us forward that's making a difference for our clients that's making money.

215

00:33:54.630 --> 00:34:03.570

Todd Cavanaugh: That ends up being less than half of our time at work, and I think at this point, we all know that being busy is not the same thing as being productive, you can feel super busy.

216

00:34:03.900 --> 00:34:11.220

Todd Cavanaugh: And at the end of the day, you know you still don't feel like you actually got done those most important things you wanted to get done.

217

00:34:11.520 --> 00:34:19.290

Todd Cavanaugh: And this is a little bit where I found myself a number of years ago close about 10 years ago now, before I started doing this kind of consulting full time.

218

00:34:19.680 --> 00:34:27.810

Todd Cavanaugh: I was leading a small nonprofit we had about a dozen people on staff, and I was finding myself really frustrated in a few different areas, I felt like.

219

00:34:28.170 --> 00:34:31.680

Todd Cavanaugh: We weren't necessarily even accomplishing all that I thought we had the potential for.

220

00:34:32.430 --> 00:34:42.930

Todd Cavanaugh: I personally felt like I was spending too much time in email meetings was a big one, so probably 95% of the time I'd walk out of a meeting and go I wish I never had to be in a meeting like that ever again.

221

00:34:43.440 --> 00:34:54.780

Todd Cavanaugh: Now, the problem was I was running all the meetings I nobody to blame, but myself, but the fact of the matter was once I started to get a team together and trying to run these things it kind of it takes a lot of time to.

222

00:34:55.050 --> 00:35:02.850

Todd Cavanaugh: come up with an agenda, think about you know, maybe sharing it ahead of time, so people could come with ideas, and again I just felt so busy none of that was happening so.

223

00:35:03.330 --> 00:35:07.500

Todd Cavanaugh: All this stuff is kind of adding up and I said, is there some tool is there something.

224

00:35:08.010 --> 00:35:17.640

Todd Cavanaugh: That can help me lead and manage what I'm trying to accomplish here and so right around that.



time this new tool called a sauna came out there's other tools, but.

225

00:35:17.940 --> 00:35:26.250

Todd Cavanaugh: Right, you know, it was a new one, I thought was interesting one of the co founders of a sauna was one of the co founders of Facebook, so I thought, well, maybe he's got kind of a different take on this thing.

226

00:35:26.730 --> 00:35:38.640

Todd Cavanaugh: So anyways we jumped in with both feet and it just made a huge difference for our organization i'd say in a matter of weeks, our internal email dropped like 40% so we're dealing with way fewer emails.

227

00:35:39.060 --> 00:35:46.560

Todd Cavanaugh: are meeting started to be run better some of our most important processes, like, for us, one of the big things we did was event planning.

228

00:35:47.040 --> 00:35:56.760

Todd Cavanaugh: And was the kind of thing you know we do these multiple events throughout the year to three day events and just hundreds of tasks evolved from contracts of hotels and.

229

00:35:57.000 --> 00:36:00.090

Todd Cavanaugh: you're bringing in speakers and music acts and all kinds of things.

230

00:36:00.450 --> 00:36:10.710

Todd Cavanaugh: And so, in order to make this happen, it was just so much work, so we get kind of everyone in the room and lock the doors in order pizza and that was kind of like you know no one's going anywhere for a while, until we figure this thing out and.

231

00:36:11.100 --> 00:36:20.700

Todd Cavanaugh: Once we realized, we can with this tool, basically, create a master checklist that whenever we need to do one of these things, the whole process gets laid out.

232

00:36:21.090 --> 00:36:29.520

Todd Cavanaugh: The timing of everything gets laid out it gets assigned to the right people, and you know we and we can just tweak a few things, but what used to take hours.

233

00:36:29.850 --> 00:36:40.020

Todd Cavanaugh: would take about 15 seconds and a few clicks for that whole process to get created, so I just it just impacted me so much that after that is when I started working with other teams.

234

00:36:40.440 --> 00:36:51.540

Todd Cavanaugh: On this tool, a sauna i've had a chance to work with a lot of amazing companies from Mercedes Benz to Harvard University, to the Cleveland browns and many, many other companies over the last decade, so.

235



00:36:52.470 --> 00:36:54.600

Todd Cavanaugh: How many times have you wished.

236

00:36:55.110 --> 00:37:07.140

Todd Cavanaugh: That you could easily create and adjust a daily plan of action, I know, different people have different systems and ways they're tracking things, but one of the things I have found for myself, maybe i'll have a chance to get into it a little bit.

237

00:37:07.500 --> 00:37:11.400

Todd Cavanaugh: Is I was basically using my email inbox almost as a to do list.

238

00:37:11.730 --> 00:37:21.570

Todd Cavanaugh: I would get in emails and things I needed to respond to or had some kind of action item associated with it, and that star flag, the things that I basically had to do and.

239

00:37:21.870 --> 00:37:27.690

Todd Cavanaugh: And that almost sometimes even email myself things I don't know you ever feel a little crazy emailing like don't forget this thing but.

240

00:37:27.810 --> 00:37:37.590

Todd Cavanaugh: The problem I ran into was that was a terrible way for me to actually prioritize my work and actually figure out what I should work on now versus something coming up soon so.

241

00:37:37.920 --> 00:37:41.430

Todd Cavanaugh: So it was an incident a sauna was a game changer for me in that area.

242

00:37:41.760 --> 00:37:50.640

Todd Cavanaugh: Have you ever wished, you could look back and find the history of when and how things happen in other words a client asked you a question, or even internally.

243

00:37:50.910 --> 00:38:02.760

Todd Cavanaugh: You you know, want to remember when it happened or look back or see the details the conversation that we had then why we reached a decision being able to kind of find that just you know again just by searching really quick.

244

00:38:03.900 --> 00:38:12.030

Todd Cavanaugh: How how nice would it be, to be able to wish and look ahead and see exactly what's coming up over the next couple weeks and.

245

00:38:12.270 --> 00:38:23.250

Todd Cavanaugh: Maybe you have a really big project, you want to do, being able to look ahead and plan when are things may be going to drop a little bit or if I added a person what might this impact and allow me to do.



246

00:38:24.210 --> 00:38:30.270

Todd Cavanaugh: Or at the bottom there you could avoid switching wouldn't be nice if you could avoid switching between five different tools.

247

00:38:30.570 --> 00:38:37.200

Todd Cavanaugh: For your communication and your chat and your file sharing and your work tracking and and kind of the complexity that can happen.

248

00:38:38.190 --> 00:38:49.680

Todd Cavanaugh: or For those of you with teams, how many times have you heard why didn't know, I was responsible for that or I thought that was you know allison's job or no one told me that was do this week or.

249

00:38:50.370 --> 00:38:59.310

Todd Cavanaugh: Again, you maybe as a manager you've had you know you have basically had to say why did this, I did this not happen, but we're not only talking about it too late, like we could have come up with a plan B.

250

00:39:00.060 --> 00:39:05.490

Todd Cavanaugh: were really popular the one with a lot of my clients didn't really bring this up in a meeting like four months ago.

251

00:39:05.700 --> 00:39:13.050

Todd Cavanaugh: And yet we're still talking about it, and nothing has actually happened yet, how do you eliminate these things, I can tell you, for every single one of these.

252

00:39:13.650 --> 00:39:22.080

Todd Cavanaugh: When I found is when people use a tool, like a sauna these all start to disappear because it directly addresses this idea of clarity.

253

00:39:22.500 --> 00:39:28.950

Todd Cavanaugh: In what you're trying to do so i'm a really big believer that whatever tools people use they shouldn't be super complicated, you have to.

254

00:39:29.310 --> 00:39:36.870

Todd Cavanaugh: Look at venn diagrams and flow charts and quadrants like people will not use that on a daily basis, but that's one of the reasons I really like this tool.

255

00:39:37.800 --> 00:39:44.310

Todd Cavanaugh: A sauna is because I do feel like it's pretty intuitive and I just want to kind of DEMO and show you things for about the next 25 minutes or so.

256

00:39:44.880 --> 00:39:52.560

Todd Cavanaugh: Just some different ideas different things, and then we were going to open up to Q amp a and i'm



just going to get through as many questions as we can, for the rest of the time.

257

00:39:53.790 --> 00:39:54.330

Todd Cavanaugh: So.

258

00:39:55.470 --> 00:40:03.000

Todd Cavanaugh: really want one of the main concepts of a sauna is promoting transparency to enact accountability.

259

00:40:03.330 --> 00:40:09.510

Todd Cavanaugh: Right giving you more transparency about who's doing what and what's happening, even for your suit yourself being able to.

260

00:40:09.750 --> 00:40:19.200

Todd Cavanaugh: kind of know what's going on said, being able to set times and dates and things like that what what we'll talk about, but if I were to really boil a sauna down to one concept it's this.

261

00:40:19.890 --> 00:40:31.950

Todd Cavanaugh: it's to allow people to connect their tasks and the work that they're tracking whether it's your marketing and sales efforts, whether it's client maintenance type work, whatever it is you're trying to track.

262

00:40:32.490 --> 00:40:47.100

Todd Cavanaugh: to connect that to the information you actually need to do the work, so this might be things like the files that are related or that you need the conversations the directions and how to do things so that, instead of having like.

263

00:40:47.850 --> 00:40:51.420

Todd Cavanaugh: I was looking at some of those great slides that were shown earlier seems like there's some.

264

00:40:51.690 --> 00:41:03.960

Todd Cavanaugh: amazing worksheets that have been provided with different ideas and and helping you develop your own procedures and things like that getting that out of a document that who How often is that going to get looked at.

265

00:41:04.560 --> 00:41:11.280

Todd Cavanaugh: So that it's directly in the place where you're tracking and when you're ready to do it, you have the directions right there that's the main idea.

266

00:41:11.760 --> 00:41:21.300

Todd Cavanaugh: All the stuff you want to track and connecting it to the information you need to actually do that, so there are hundreds of thousands of teams that are using a sauna at this point.

267



00:41:22.170 --> 00:41:29.160

Todd Cavanaugh: it's a browser based platform, you know you can access it anywhere you just need Internet the results so at this point desktop Apps.

268

00:41:29.490 --> 00:41:39.360

Todd Cavanaugh: And iPhone Apps a lot of times a sauna, as I mentioned, can can rather than having so many tools, you can start to simplify a little bit so a lot of internal email.

269

00:41:39.780 --> 00:41:47.250

Todd Cavanaugh: Would it be nice if a lot of that could basically disappear, so you could use your email inbox more focused on your partners and contractors and things like that.

270

00:41:47.910 --> 00:41:58.920

Todd Cavanaugh: I always think it's funny when we have like \$1,000 computer and we're sticking like post, it notes all around the outside, because you really don't want to forget that one important day right, what if you could actually trust, a system.

271

00:41:59.370 --> 00:42:02.490

Todd Cavanaugh: to remind you, when these different things are happening right and.

272

00:42:02.730 --> 00:42:15.120

Todd Cavanaugh: I don't think a sound is going to replace all meetings that wouldn't even probably be healthy, but it definitely can reduce the need for meetings, just to figure out where we're at because we're actually gonna be able to look live and see where we're at.

273

00:42:15.450 --> 00:42:20.610

Todd Cavanaugh: kind of whenever we want to so with that I think i'm going to switch my screen here hold on one second.

274

00:42:24.660 --> 00:42:34.050

Todd Cavanaugh: All right, I think everybody should be able to see now, so I just want to end it looks like there's already a whole bunch of questions i'm going to just kind of present for a little while then.

275

00:42:34.710 --> 00:42:40.680

Todd Cavanaugh: go in, but if stephanie or allison you see something you think is relevant just feel free to interrupt me and i'll i'll address it.

276

00:42:41.640 --> 00:42:48.780

Todd Cavanaugh: Alright, so let me just kind of give you a very brief overview and then we'll start talking about some different examples of ways, you can use this.

277

00:42:49.200 --> 00:42:58.440

Todd Cavanaugh: So, in terms of kind of the the overall layout it's pretty simple you got a kind of navy blue main



navigation area so.

278

00:42:59.010 --> 00:43:07.320

Todd Cavanaugh: If, for whatever reason, you know you're not seeing that you just can hide that if you want to focus a little more on your content in a meeting or something like that.

279

00:43:07.650 --> 00:43:16.200

Todd Cavanaugh: But up at the top, you got some of the main areas we're going to be looking, especially where it says my tasks that's everything assigned to you so that's usually like kind of.

280

00:43:16.770 --> 00:43:22.680

Todd Cavanaugh: Each person's home base after you do some project planning then you're ready to do the stuff that's been assigned to you so.

281

00:43:22.980 --> 00:43:35.130

Todd Cavanaugh: got my tasks inbox is where all your notifications are going to go through the notification Center so anything related to questions, people are asking updates things like that's all going to filter into one place.

282

00:43:36.540 --> 00:43:40.950

Todd Cavanaugh: i'm going to skip a couple of these other ones for now Those are two of the most important ones.

283

00:43:41.370 --> 00:43:47.400

Todd Cavanaugh: underneath that you've got an area called favorites now the idea with favorites let me actually switch my screen here.

284

00:43:47.910 --> 00:43:56.520

Todd Cavanaugh: They deal with favorites is that there are certain projects or certain priority type things that you're tracking that you want to be able to just one click always be able to find it.

285

00:43:56.910 --> 00:44:02.760

Todd Cavanaugh: We can find what's called a project over here in your sidebar, let me just pick this one called delta overfly.

286

00:44:03.300 --> 00:44:12.660

Todd Cavanaugh: Will star that bad boy, and now that's kind of up in my favorites area right there and then I could rearrange this whatever I want to so anyways that's kind of your own place to.

287

00:44:13.140 --> 00:44:16.590

Todd Cavanaugh: Access your most frequently they you know access things.

288

00:44:17.370 --> 00:44:32.100



Todd Cavanaugh: Then we've got an area called saved searches now i'm just going to go through this pretty quick, because this is an overview, but this becomes so powerful where you can create these reports that, as you start putting good information into a system.

289

00:44:32.280 --> 00:44:41.460

Todd Cavanaugh: You can start pulling it out again to help you answer questions so just kind of one example here i'm going to go up the way that we build these as we go up to the search bar.

290

00:44:42.060 --> 00:44:45.990

Todd Cavanaugh: And then i'm gonna click where it says advanced search advanced search.

291

00:44:46.380 --> 00:44:55.620

Todd Cavanaugh: And so it kind of gives you these groups of filters that we can start to look for the tasks and work that people are doing and create a simple report, so I might say, I want to view all the tasks.

292

00:44:56.130 --> 00:45:00.930

Todd Cavanaugh: That are let's say incomplete if they're already done, I don't really want to pull those ones.

293

00:45:01.290 --> 00:45:12.930

Todd Cavanaugh: And I only want tasks related to a certain group of people, or a certain group of projects and in a sauna that's usually called a team now there's a whole bunch of different filters in here.

294

00:45:13.590 --> 00:45:26.280

Todd Cavanaugh: If you end up you know signing up for an asana DEMO some time on a Friday night when you're looking to have a lot of fun, you can look through all the different filters, but i'll just tell you right now we got in teams, right here, and we will say marketing.

295

00:45:27.360 --> 00:45:42.720

Todd Cavanaugh: like this right, so I can kind of pick and choose what i'm looking for and i'm going to get a bunch of results alright so here's a whole bunch of tasks now within this team now this kind of is a little messy it's just you know just a wall of tasks and things that are happening.

296

00:45:43.860 --> 00:45:48.660

Todd Cavanaugh: But I can sort this in different ways, so, for example, I might sort by who's doing what.

297

00:45:49.470 --> 00:46:00.030

Todd Cavanaugh: Now that was quick already, but once you create a report like this i'll just save it and i'm going to call it marketing upcoming tasks.

298

00:46:00.960 --> 00:46:11.640

Todd Cavanaugh: And so, broken down by person now it, this is why we started talking about that now, in my saved searches there's that one that I just created marketing i'm coming test, so I can be anywhere else in a sauna.



299

00:46:11.910 --> 00:46:18.420

Todd Cavanaugh: and say, let me see what's going on with all the work in a certain area my event tasks my sales tasks, whatever it is.

300

00:46:18.720 --> 00:46:30.960

Todd Cavanaugh: And with one click now broken down by every person who's on your team, you can see what's coming up next in case I want to check in I can check them with Brian and his task here, this is this is DEMO data, so a lot of this is real.

301

00:46:31.290 --> 00:46:35.040

Todd Cavanaugh: But I see i've got one that's overdue here, so I could click in and.

302

00:46:36.120 --> 00:46:40.980

Todd Cavanaugh: You can kind of talk to people just using the at symbol so i'm going to say Jamie.

303

00:46:42.870 --> 00:46:49.200

Todd Cavanaugh: I noticed we missed this could you give me.

304

00:46:49.710 --> 00:46:54.870

Todd Cavanaugh: An update so again the same place where we're tracking has this thing happened yet.

305

00:46:55.050 --> 00:47:05.310

Todd Cavanaugh: And we're providing information about the task is the same place where all the conversation is happening so it's again it's very easy you're not having to switch between a whole bunch of things it's all kind of in one place.

306

00:47:05.970 --> 00:47:08.160

Todd Cavanaugh: So we've got this area called saved searches.

307

00:47:08.520 --> 00:47:19.590

Todd Cavanaugh: And then we can break things down by team, so a team might be again, some of you, I know you might have multiple like a sales team, or something like that others of you it's you know, a handful of people are just yourself.

308

00:47:19.980 --> 00:47:26.850

Todd Cavanaugh: And it's still finding us teams it's just ways for you to kind of separate different areas so maybe you have.

309

00:47:27.450 --> 00:47:34.710

Todd Cavanaugh: Your like em like a marketing team with different kinds of marketing projects that help you gather your ideas there, and you might have another team.



310

00:47:35.010 --> 00:47:41.550

Todd Cavanaugh: that's your client maintenance and you're actually creating projects for each of your clients things like that there's different ways we can organize it but.

311

00:47:41.820 --> 00:47:52.740

Todd Cavanaugh: We have we can have all these different teams here and then within each team you've got what are called projects which are really just the groups of related tasks, so let me show you a couple example projects.

312

00:47:54.030 --> 00:48:04.770

Todd Cavanaugh: let's switch workspace real quick here's something that I think many of you would would want to have, which is basically what's called an editorial calendar.

313

00:48:05.250 --> 00:48:15.720

Todd Cavanaugh: Now the idea here is for any content we're going to be producing it could be social media posts could be podcasts like I saw stephanie was talking about.

314

00:48:16.140 --> 00:48:30.450

Todd Cavanaugh: could be email marketing whatever it is, I want one place where I can actually look and see what's coming up and i'll show you a couple of reasons why, but basically what i'm doing here is each task.

315

00:48:30.960 --> 00:48:41.220

Todd Cavanaugh: is going to be, you know, an article or the email or whatever so i'll list out my different tasks the way i'm doing this i'm breaking it down these are called sections these kind of bold headings.

316

00:48:41.640 --> 00:48:46.020

Todd Cavanaugh: And i'm going to break it down by month just so I can kind of visually scan and see what's going on.

317

00:48:47.190 --> 00:48:53.160

Todd Cavanaugh: And over here i've created this is all customizable up here, these are called custom fields but.

318

00:48:53.610 --> 00:49:09.330

Todd Cavanaugh: i've created what's called a drop down custom field, just to track the type of content, it is, and I gave them all different colors i'll show you why did that in just a minute so again i'm tracking my social media posts, here are some articles, maybe a video that you film things like that.

319

00:49:10.500 --> 00:49:21.270

Todd Cavanaugh: Here, if you want to track kind of where we're at on things, maybe you hire someone just to write or produce content they're not really a main part of your team it's a contract or you can actually invite contractors into a sauna.

320

00:49:21.420 --> 00:49:27.030



Todd Cavanaugh: completely free meaning they can join your workspace you don't have to pay for their seat or anything like that.

321

00:49:27.570 --> 00:49:35.610

Todd Cavanaugh: And, and so this would might give you kind of an overview of where we're at with some of the different things, I asked the person to you know help me create what phase there in.

322

00:49:36.150 --> 00:49:42.150

Todd Cavanaugh: This is a number of custom fields, so if I wanted to you know estimate for myself how long different things would take.

323

00:49:42.510 --> 00:49:51.630

Todd Cavanaugh: You know I can right here in the month of January immediately see all right i'm planning to spend about 20 hours of content would that help you maybe in deciding.

324

00:49:51.990 --> 00:49:57.660

Todd Cavanaugh: whether I should hire someone or not, or, to be able to block out your time if you knew exactly kind of how long you were looking for so.

325

00:49:58.530 --> 00:50:08.130

Todd Cavanaugh: So this is kind of the what's called the list layout, but I can also view the same information in different ways, so, for example, I could do it in a calendar layout.

326

00:50:08.550 --> 00:50:14.670

Todd Cavanaugh: For me just scroll up a little bit so now we're seeing it's the same information but reviewing getting more of a calendar view.

327

00:50:14.850 --> 00:50:20.820

Todd Cavanaugh: Now there's going to be pros and cons of why you want to might want to view things in different ways, so, for example, remember, I told you.

328

00:50:21.210 --> 00:50:28.320

Todd Cavanaugh: I gave different types of content or assuming different colors to the different types of content, well, I want to view those.

329

00:50:28.770 --> 00:50:35.640

Todd Cavanaugh: colors on my calendar, why would I do this let's say I looked on my calendar that looks like this:

330

00:50:36.360 --> 00:50:43.320

Todd Cavanaugh: Now this is going to immediately jump out at you why am I, like I happen to know that this blue means social media post.

331



00:50:43.620 --> 00:50:52.020

Todd Cavanaugh: Why don't Why did I accidentally schedule all my social media posts to be right next to each other wouldn't be better maybe if I spread things out or your make sure your emails aren't.

332

00:50:52.260 --> 00:50:58.350

Todd Cavanaugh: You know overwhelming people because you're spreading them out, I mean it really jumps out at you in this kind of a view and that's happening.

333

00:51:00.720 --> 00:51:03.690

Todd Cavanaugh: As opposed to something like this the list layout where.

334

00:51:04.770 --> 00:51:11.430

Todd Cavanaugh: You know it's the same information but doesn't really jump out at you the same way alright so that's that's an editorial calendar let's take a look at another one.

335

00:51:12.180 --> 00:51:19.200

Todd Cavanaugh: We mentioned, I mentioned, I used to do a lot of events, and so what we did is we created a template.

336

00:51:19.830 --> 00:51:26.490

Todd Cavanaugh: For whenever we were doing one of our conferences, now I had a friend who is a financial planner out in the La Las Vegas area when I was living there.

337

00:51:27.060 --> 00:51:33.450

Todd Cavanaugh: And one of the things he did is these kind of big events, I think he was involved in like medicare type.

338

00:51:34.080 --> 00:51:39.480

Todd Cavanaugh: Things and they would do these kind of big events to try to get people to come and sign people up to to you know.

339

00:51:39.990 --> 00:51:44.220

Todd Cavanaugh: administer their medicare whatever I don't know all the details, but imagine if you could.

340

00:51:45.180 --> 00:51:55.620

Todd Cavanaugh: Again, in a few clicks when you create a template like this, where i've listed out everything I need to do, I can be assigning these if you have different people on your team to who's going to be doing what.

341

00:51:56.070 --> 00:52:02.190

Todd Cavanaugh: I can even lay out a time timing of things that should happen, three days after that this happens next.



342

00:52:02.610 --> 00:52:15.240

Todd Cavanaugh: And you know next time we have one of these events where we're going to have another medicare event, all I need to come in come into a sauna i'm gonna say I want to use one of these templates I created use a template.

343

00:52:16.980 --> 00:52:22.350

Todd Cavanaugh: let's see here all my templates are going to be saved in here, and so I want this, one that is called.

344

00:52:23.400 --> 00:52:30.360

Todd Cavanaugh: conference planning, and you know i'll rename it it's the I don't know, whatever may medicare event.

345

00:52:31.590 --> 00:52:40.950

Todd Cavanaugh: Go to the next page here's where if we've put dates in our template we can automatically adjust them, so we say yeah I know I want the last date in my template.

346

00:52:41.190 --> 00:52:44.970

Todd Cavanaugh: To be you know the date that we hold the event or something like that, or maybe.

347

00:52:45.300 --> 00:52:51.420

Todd Cavanaugh: For client onboarding which we'll talk about in a minute, you might want to say all right if i'm starting this client today.

348

00:52:51.660 --> 00:52:58.500

Todd Cavanaugh: here's what I want to have happen today here's what I want to have happen tomorrow and the next day and so so on and so forth, and so you could pick a start date.

349

00:52:58.890 --> 00:53:08.310

Todd Cavanaugh: And then just hit create project and it's going to clone exactly the way you have it help you again not have to do the effort of thinking through those things.

350

00:53:08.550 --> 00:53:17.040

Todd Cavanaugh: Not have to create a new excel spreadsheet that you check into but you never actually get reminded with things happen or not it's a totally different kind of way of thinking about it.

351

00:53:18.870 --> 00:53:31.920

Todd Cavanaugh: Good let me keep going so let's say we get a new client so we've got our client onboarding template templates and any thing, where we can systemized things I think is awesome So here we go we've got our new client onboarding.

352

00:53:32.370 --> 00:53:38.700

Todd Cavanaugh: again take these amazing procedures and things that you've either already built or that limitless



has been helping you with.

353

00:53:39.120 --> 00:53:45.090

Todd Cavanaugh: And we're going to put it into a system that now we can track immediately use whatever you want to so we've got.

354

00:53:45.690 --> 00:53:54.540

Todd Cavanaugh: Our initial onboarding call different things that we need to do, and maybe some back end technology related things of getting account setup and different things.

355

00:53:55.320 --> 00:54:02.580

Todd Cavanaugh: Maybe there's certain kinds of kind of contract work and how you get them to sign, you know and trust this their deposits and things like that.

356

00:54:03.450 --> 00:54:12.480

Todd Cavanaugh: Some different internal related things, this is, you know there's some of this was based on kind of an accounting type person, but different things we need to do, related to that and.

357

00:54:12.870 --> 00:54:20.040

Todd Cavanaugh: So anyways that whole process, making it so that you can imagine what would, if I were the client what would an ideal workflow.

358

00:54:20.280 --> 00:54:31.140

Todd Cavanaugh: way that I get the information just thinking through that process, putting it in here, and then we can repeat the same thing over and over so easily, let me keep going.

359

00:54:33.570 --> 00:54:45.540

Todd Cavanaugh: It going back to the idea of just like simple processes, sometimes you have these things where it's not the most complex thing in the world, but maybe there's five steps six steps sometimes different people are doing them.

360

00:54:45.900 --> 00:54:59.910

Todd Cavanaugh: And we just want to make sure that we are doing them all, without letting things fall between the cracks and so a fairly new feature in a sauna is called a task template so everything that we're looking at here, these are kind of bigger deals there a project template.

361

00:55:00.930 --> 00:55:09.240

Todd Cavanaugh: Let me go back into see here where we'll just go into the one that I was in before so one of the things now, we can do is let's say.

362

00:55:10.140 --> 00:55:15.090

Todd Cavanaugh: let's say I have a new email blast that I want to create right so we're going to just do.



363

00:55:15.510 --> 00:55:23.280

Todd Cavanaugh: Simple marketing, so what I'm going to do here is I've already created this, but now, instead of just creating kind of a blank task, where I have to think through everything.

364

00:55:23.820 --> 00:55:39.810

Todd Cavanaugh: have created this test template for an email or maybe you do a print or whatever, but I'm gonna say okay email newsletter, and so what it's doing now is it's creating the task I'll name rename it let's call it the September email newsletter.

365

00:55:41.430 --> 00:55:51.570

Todd Cavanaugh: And the different steps in here, I actually already put in some information in the description some prompts to make sure that people put in the right information, what is the.

366

00:55:51.840 --> 00:55:56.700

Todd Cavanaugh: Subject line, going to be and what's the goal, or that call to action we were talking about and.

367

00:55:57.060 --> 00:56:01.170

Todd Cavanaugh: And anyway, so I got some prompts here's some different steps that are getting created right.

368

00:56:01.440 --> 00:56:09.120

Todd Cavanaugh: someone's got to write it someone else is going to do the designing someone might test it, you know, make sure our links work, how many times have you had that situation happen.

369

00:56:09.510 --> 00:56:11.910

Todd Cavanaugh: going to send the second email and look kind of silly.

370

00:56:12.450 --> 00:56:20.340

Todd Cavanaugh: someone's going to give a final Okay, and then we're going to schedule it to send, so I mean it's not rocket science, but different people are involved, we don't want to forget any of the steps.

371

00:56:20.610 --> 00:56:29.910

Todd Cavanaugh: And we can create that look at this, you can see, the timing of this was all ready to go, so that by you know, in the next few days we're going to be ready to go so for simple processes.

372

00:56:30.180 --> 00:56:35.550

Todd Cavanaugh: that's okay too and and we can just create kind of this task with sub tasks, really, really quickly as well.

373

00:56:37.920 --> 00:56:46.080

Todd Cavanaugh: I got a few more things to go through, but I feel like I haven't checked in on chat or anything in a while, so let me, let me just read through a couple things here see what we've got.



374

00:56:47.760 --> 00:56:48.660

Todd Cavanaugh: To do to do.

375

00:56:50.280 --> 00:56:51.150

Todd Cavanaugh: The slide oh.

376

00:56:51.660 --> 00:57:02.880

Stephanie Bogan: there's a few questions in slide Oh, but as I as i've been listening to Todd one again you guys are going to translate this into your offices and the size of your teams, but the thing I want you to really pick up from here.

377

00:57:03.360 --> 00:57:14.310

Stephanie Bogan: Whether it's an editorial calendar or social media calendar anything that's not directly client centric that's covered through your CRM right those direct emails what's happening with Bob.

378

00:57:14.880 --> 00:57:22.260

Stephanie Bogan: Everything else, where we get hung up is in the everything else, and so that's where a saunas or our spreadsheet right.

379

00:57:22.590 --> 00:57:33.870

Stephanie Bogan: What what the what is Sana does that the spreadsheets dump, which is why i'm really just skipping to everyone here can generally afford to buy and implement a sauna truly.

380

00:57:34.440 --> 00:57:44.040

Stephanie Bogan: But what the spreadsheets can do, but what a sauna really adds in terms of what's additive to the progress piece is momentum.

381

00:57:44.460 --> 00:57:51.450

Stephanie Bogan: Which is meetings Todd mentioned this earlier and most people would really miss it, but I want you guys to catch it, which is most of the time.

382

00:57:51.900 --> 00:57:58.050

Stephanie Bogan: engagement is our momentum it's why we used to meet with clients four times a year and so two times right it's it's that.

383

00:57:58.410 --> 00:58:05.190

Stephanie Bogan: that's how we sort of translated it and so when we don't have a system for creating successful change.

384

00:58:05.550 --> 00:58:14.730



Stephanie Bogan: We have to have lots of interactions and that shows up, I mean I remember there's a point at last year, where I was like literally of my 24 hours a week, I think, a third of them are meetings.

385

00:58:15.060 --> 00:58:20.190

Stephanie Bogan: we're going to need to back off that like it told me like hey there's a system breakdown.

386

00:58:20.520 --> 00:58:27.420

Stephanie Bogan: Because what i'm creating as a support scaffolding is lots of communication, like these are things that are coming up.

387

00:58:27.660 --> 00:58:34.740

Stephanie Bogan: And it totally makes sense right we went from that very small lifestyle me and Lisa working part time to okay we're going to take it up a notch.

388

00:58:35.070 --> 00:58:42.060

Stephanie Bogan: i've done this a few times I know what that curve looks like and I was like Oh, this is exactly where we're at we got to start building systems, so now.

389

00:58:42.420 --> 00:58:50.340

Stephanie Bogan: it's a whole like a year later it's a process document institutionalized because you need to be able to take what you do.

390

00:58:50.790 --> 00:58:57.480

Stephanie Bogan: This is the key for you right in terms of the accountability piece, we all want to get the results we want is, you have to be able to define it.

391

00:58:57.930 --> 00:59:05.430

Stephanie Bogan: plan it and then measure it in a way that you can go you hit the goal you didn't hit the goal and then that's what creates accountability.

392

00:59:06.030 --> 00:59:13.620

Stephanie Bogan: And so it's really about taking all the non client stuff the run the shop of the business and the marketing and your task list so.

393

00:59:13.860 --> 00:59:22.320

Stephanie Bogan: Todd I would love to have you show them because I rely on it so heavily if you can, if not, I can how a sauna can integrate with their calendar in terms of radio.

394

00:59:22.470 --> 00:59:28.920

Stephanie Bogan: shows on my work blocks literally just show up on my calendar based on what's in a sauna and vice versa, which.

395



00:59:28.920 --> 00:59:37.800

Stephanie Bogan: Is the thing that really pushed me over the edge like Okay, this really not only allows me to manage my projects, but it allows me to translate those priorities.

396

00:59:38.250 --> 00:59:44.010

Stephanie Bogan: into my daily calendar without the team having to go through extra steps, because you guys know i'm very.

397

00:59:44.370 --> 00:59:50.550

Stephanie Bogan: Like I manage my time to like a ridiculous level so every minute of my day is literally blocked out.

398

00:59:50.910 --> 00:59:59.190

Stephanie Bogan: But a sauna now integrates in a way that like literally just whatever's on my asana calendar shows up on my actual calendar and then Lisa can manage that.

399

00:59:59.910 --> 01:00:07.380

Stephanie Bogan: relative to all those projects and priorities, and then the other thing is like the weekly huddle what we call the weekly huddle team meetings right, how do you use.

400

01:00:07.980 --> 01:00:22.020

Stephanie Bogan: How do you use a sauna with the meetings to really amp that momentum, because now you've got accountability in a way that there's just no place for anyone to hide you included by the way, which is also very important gradient my experience.

401

01:00:22.320 --> 01:00:22.800

hmm.

402

01:00:24.660 --> 01:00:32.280

Todd Cavanaugh: All right, good yeah some awesome points I will definitely show the calendar in just a minute, so let me address a couple questions, so I know, Melissa.

403

01:00:32.730 --> 01:00:41.130

Todd Cavanaugh: is getting ready to go here, I just want to mention real quick she said, can you speak to the addition of one more system, you have to manage and.

404

01:00:41.460 --> 01:00:45.990

Todd Cavanaugh: There was actually a great response from Adam that you know you're.

405

01:00:46.440 --> 01:00:54.660

Todd Cavanaugh: He sounds like he is it already in a sauna user that a lot of things will actually fold into this, I tried to make that point earlier that a lot of the.



406

01:00:55.050 --> 01:01:04.530

Todd Cavanaugh: 10 different systems you're having to check in another place to log in the way I like to think about is that think of it is like the operating system for what you're doing kind of the baseline.

407

01:01:04.890 --> 01:01:14.550

Todd Cavanaugh: Where we're tracking everything and then sometimes you'll want specialized tools marketing will try to address CRM because there's another question about that and the slide oh.

408

01:01:15.060 --> 01:01:26.850

Todd Cavanaugh: But I think you're actually going to find it will simplify things you actually might be able to cancel some other subscriptions because it's so flexible again i've worked with industries from education to.

409

01:01:27.750 --> 01:01:38.310

Todd Cavanaugh: Manufacturing the I mean just everything I could think of consultants, it can do a lot in we you we it works best when you just create it for the purposes of what you want to track.

410

01:01:39.390 --> 01:01:48.690

Todd Cavanaugh: Good in our in slide Oh, how do you recommend integrating a team management tool like a sauna with existing CRM software and work where flows.

411

01:01:49.410 --> 01:01:59.280

Todd Cavanaugh: that's a great question a lot of times, I think the to work well together, so if you're used something using something like a sales for certain fusion soft or something like that.

412

01:01:59.580 --> 01:02:08.550

Todd Cavanaugh: The way I usually like to do it is just create a clear delineation point which a lot of times will be like a contract being signed or winning the deal.

413

01:02:08.880 --> 01:02:14.670

Todd Cavanaugh: And at that point, I like to transition into a sauna where i'm maintaining the relationship and.

414

01:02:15.000 --> 01:02:24.060

Todd Cavanaugh: tracking when I want to send them birthday emails or whatever else all that information I start to track and build out in different templates in a sauna so.

415

01:02:24.330 --> 01:02:30.600

Todd Cavanaugh: The advantage main advantage, I think of something like a CRM which is 100% focused on that sales and marketing side.

416

01:02:30.930 --> 01:02:40.740

Todd Cavanaugh: I think is primarily integrating with your emails and communication, so you can track with the person exactly the communications happen back and forth, so there are some advantages.



417

01:02:41.430 --> 01:02:50.940

Todd Cavanaugh: A sauna can be used as kind of a lightweight CRM I actually do that if, but I think for in a lot of ways you'd be better off for the sales and marketing piece.

418

01:02:51.300 --> 01:02:56.880

Todd Cavanaugh: Continuing to use a CRM and just finding that point where we want to transition from one into another.

419

01:02:57.540 --> 01:03:04.320

Todd Cavanaugh: Wait a bunch of great questions from matt the rest of you need to put as many questions as matt because he's into this right now, I can tell.

420

01:03:04.650 --> 01:03:16.380

Todd Cavanaugh: He said if we're deep into using Microsoft teams and Microsoft Office 365, how can we use a sauna without staff feeling like they're having to check a whole bunch of things so great question number one.

421

01:03:17.610 --> 01:03:26.250

Todd Cavanaugh: First off this a sauna can integrate pretty well with teams, especially the file sharing components, so the way I like to think of teams is it's.

422

01:03:26.520 --> 01:03:38.280

Todd Cavanaugh: Primarily, a communication tool it's a great thing that for quick chats the way I like to think about it is, if I were you know, trying to get a quick response from someone or amanda meeting and I wanted to ask someone a question.

423

01:03:38.490 --> 01:03:45.600

Todd Cavanaugh: I think teams works great for that when you're sharing files back and forth like here, I am just in a task in a sauna.

424

01:03:46.590 --> 01:03:56.430

Todd Cavanaugh: And right up at the top here, you see this little attachment button, and so we can attach things keep using teams keep using onedrive or sharepoint whichever version you're using.

425

01:03:57.060 --> 01:04:09.630

Todd Cavanaugh: All the files you sharing teams are usually ending up in onedrive and you can just find those link those again directly to this task so whenever I come to look at this thing, whether it's you know for a certain client or whatever.

426

01:04:10.140 --> 01:04:22.380

Todd Cavanaugh: I can find the file directly in onedrive and I think that's actually the preferred way to do it is used if you're using one of these major file sharing services it's not just Microsoft Google drive dropbox box.



427

01:04:23.670 --> 01:04:28.770

Todd Cavanaugh: By using one of those probably the way that you might already be doing it and link to those.

428

01:04:29.190 --> 01:04:35.190

Todd Cavanaugh: it's helping your file management tool handle what's called the version control meaning let's say I had a spreadsheet.

429

01:04:35.520 --> 01:04:46.140

Todd Cavanaugh: And I made a change on the spreadsheet well this will always be linking to that most up to date version of the spreadsheet Now you can attach things directly from you know your computer your desktop.

430

01:04:46.770 --> 01:04:54.900

Todd Cavanaugh: But the problem, there is now if you make a change we got to delete the one that's been uploaded and created you know upload a new one, so anyways keep doing it that way.

431

01:04:56.850 --> 01:05:02.640

Todd Cavanaugh: Anyway, so I think I think it can work well in conjunction there's going to be a little bit of overlap with.

432

01:05:03.060 --> 01:05:13.140

Todd Cavanaugh: With teams and some of the chat usually the way I like to recommend is that if we're talking about a specific piece of work, I like I try to keep as much of that communication as possible.

433

01:05:13.740 --> 01:05:28.260

Todd Cavanaugh: With the task so again it's all in one place we're trying to simplify but i've had a lot of clients that use both and I don't think it's going to be a total you know brain explosion, to try to you know understand where one can be better than the other, so let me keep going here.

434

01:05:29.490 --> 01:05:40.650

Todd Cavanaugh: When see when you decide to make something a workflow in red tail versus a project i'm not familiar with red tail i'm not sure who asked that if or maybe someone can.

435

01:05:41.640 --> 01:05:46.620

Stephanie Bogan: it's a fine it's a finance specific CRM so some of the workflows I think.

436

01:05:46.890 --> 01:05:58.500

Stephanie Bogan: A good delineation point is a lot of the client centric workflows right hey send this do this scheduled meeting follow up that a sonic can do, by the way, if you don't have one of those for some reason.

437

01:05:58.920 --> 01:06:07.140

Stephanie Bogan: are handled in those workflows and automated and then for this group, really, it would be what I call the run the shop and then right really growing.



438

01:06:07.620 --> 01:06:08.160

Todd Cavanaugh: As it's.

439

01:06:08.220 --> 01:06:12.660

Stephanie Bogan: You know everything that happens around the clients, or we can meetings are things getting done.

440

01:06:13.440 --> 01:06:23.160

Stephanie Bogan: You know what's going on with this project is our marketing calories are on track, you know it's all of that, the tasking and accountability related to the priorities that they're managing running the business and growing it.

441

01:06:24.300 --> 01:06:36.360

Todd Cavanaugh: mm hmm good another question from matt here what are best practices for con bond boards and when to use them versus list so what matt is asking about is.

442

01:06:37.050 --> 01:06:43.710

Todd Cavanaugh: If you want to view in a list or like it, the way i'm looking at this project, right here i'm viewing in the list view.

443

01:06:44.130 --> 01:06:50.220

Todd Cavanaugh: there's another view called the board, maybe if some of you have ever used the tool called trellis you might be pretty familiar with this.

444

01:06:50.490 --> 01:07:01.260

Todd Cavanaugh: And we're now each task is almost more like a three by five card on a whiteboard with columns rather than kind of like a virtual representation of a notepad or something like that.

445

01:07:01.830 --> 01:07:15.750

Todd Cavanaugh: And, in general, in terms of how the best use this view I would not use it for something like this, where each of my sections is kind of a category or chronological type thing like this.

446

01:07:16.080 --> 01:07:22.560

Todd Cavanaugh: Where it usually makes sense to do it like a board layout is something like this where, if you want to track.

447

01:07:22.890 --> 01:07:27.120

Todd Cavanaugh: hey here's the things that we want to do next or it's kind of our backlog.

448

01:07:27.450 --> 01:07:36.090

Todd Cavanaugh: And then, when we're ready to work on it, this might be a good view, for example, if you're



working with a virtual assistant, you want to help them prioritize what you want them to work on for the week.

449

01:07:36.510 --> 01:07:41.520

Todd Cavanaugh: You just brainstorm and think through all the different things that you could have them do or whatever.

450

01:07:41.940 --> 01:07:55.800

Todd Cavanaugh: And then, what you could do is you could drag that into the next column, so, in other words now now this person knows that they're supposed to work on this as a matter of fact, depending on your sauna plan that that you could potentially get.

451

01:07:56.430 --> 01:08:04.140

Todd Cavanaugh: We could have it automatically assign it to a certain person once it reaches a stage like this right, so it automatically gets assigned to the va or whatever.

452

01:08:04.500 --> 01:08:09.870

Todd Cavanaugh: Virtual assistant, and then they you know they do that thing and then it gets moved to the next column.

453

01:08:10.140 --> 01:08:17.640

Todd Cavanaugh: for you to take a look at and maybe it could assign it back to you if you wanted to do something like that, and then we're all done, we can you know drag it into the completed column so.

454

01:08:17.970 --> 01:08:24.840

Todd Cavanaugh: that's usually how a con bond board is best used it was those were actually developed by Toyota or made popular by Toyota and.

455

01:08:25.110 --> 01:08:29.340

Todd Cavanaugh: The main idea is to kind of spot where you might have an issue, so, for example.

456

01:08:29.550 --> 01:08:37.380

Todd Cavanaugh: let's say we end up with 20 tasks and needs review something in your process there's a little goofed up maybe you haven't you know, Stephen was mentioned you gotta.

457

01:08:37.650 --> 01:08:42.690

Todd Cavanaugh: be able to track and get data from what's happening and measure it well, if you end up with you know.

458

01:08:42.870 --> 01:08:55.890

Todd Cavanaugh: there's not enough time for the reviews that maybe we need to re prioritize and figure out in that, and this kind of view makes that really obvious where you kind of get the long lines of things that get kind of stuck or in some kind of obstacle.



459

01:08:57.720 --> 01:09:00.630

Todd Cavanaugh: Another question can use a sauna for meeting minutes.

460

01:09:01.080 --> 01:09:09.180

Todd Cavanaugh: yeah so that's a that's a good question, let me just show you one example, since I was going to do this anyways one example of how you could use a sauna for a meeting.

461

01:09:09.480 --> 01:09:16.140

Todd Cavanaugh: So here we go let's pretend we've got our i'm just calling this a marketing weekly meeting but doesn't have to be for that department.

462

01:09:17.070 --> 01:09:24.060

Todd Cavanaugh: So what i'm doing is i'm kind of breaking up different areas of the meeting with again what are called sections, you can create those.

463

01:09:24.480 --> 01:09:29.010

Todd Cavanaugh: Right at the very bottom it says add section or right up here you hit add section.

464

01:09:29.670 --> 01:09:39.600

Todd Cavanaugh: And so we got where it says recurring maybe there's certain things you want to kind of go over every meeting you know some of your upcoming milestones are some of the action items from the last meeting.

465

01:09:40.110 --> 01:09:51.450

Todd Cavanaugh: I had a client who did this, I kind of liked it he went over you know just some of the like great things that happened over the last week or two just to talk over the team, but also maybe some issues or things that are coming up.

466

01:09:51.990 --> 01:09:56.460

Todd Cavanaugh: And then we really got the meat of the meeting so here's what we got to talk about this week.

467

01:09:57.480 --> 01:10:02.070

Todd Cavanaugh: So remember I mentioned, I really was struggling running meetings.

468

01:10:02.820 --> 01:10:11.400

Todd Cavanaugh: What I, the reason I found a sonic it helped me out is because now, the the agenda creation process could become more collaborative.

469

01:10:11.610 --> 01:10:19.950

Todd Cavanaugh: Meaning it wasn't just up to me to think through everything we needed to talk about other people on the team if they felt like they had things they needed to talk about.



470

01:10:20.460 --> 01:10:23.370

Todd Cavanaugh: Just as an example i'm going to open another project.

471

01:10:23.880 --> 01:10:34.380

Todd Cavanaugh: And one of the neat concepts in a sauna is that tasks can live in more than one project, at the same time, this is different, it sounds kind of weird or complicated, but it ends up being really important.

472

01:10:34.860 --> 01:10:42.750

Todd Cavanaugh: Because people want to view things in different contexts, you might want to view things in the context of everything that's going on with the client.

473

01:10:43.080 --> 01:10:54.660

Todd Cavanaugh: The person who does your email marketing they don't care about your clients, they just want to view the emails they have to write it makes it so you can view things in different contexts so somebody in this case let's just pick on one of these random tasks here.

474

01:10:56.490 --> 01:11:07.170

Todd Cavanaugh: This task and belong to more than one project i'm going to add it into the marketing weekly meeting project there and i'll even put it in the right section to discuss this week.

475

01:11:07.680 --> 01:11:14.340

Todd Cavanaugh: So if I were to go back to that project now if i'm the one facilitating the meeting I can actually see oh interesting.

476

01:11:15.120 --> 01:11:23.190

Todd Cavanaugh: Someone added in they want to talk about this, let me go down and look here in the history, it shows me who put it here, so I can tell who wanted to talk about it.

477

01:11:23.610 --> 01:11:27.330

Todd Cavanaugh: And I think we got time to talk about that, let me just drag it down a little bit.

478

01:11:28.140 --> 01:11:36.540

Todd Cavanaugh: I think you know we'll talk about it there, and so now we can go through we're talking about things in our meeting where either checking them off or different things we can do there.

479

01:11:36.840 --> 01:11:48.420

Todd Cavanaugh: And here's the key This is where a sauna becomes gold for you, before the meeting is done, we have already created the action items we finished talking about a thing okay we're going to do this.

480

01:11:49.050 --> 01:12:00.900

Todd Cavanaugh: john is going to take care of this, and so what happens, we create the task we assign it to the person we give it a due date so that we know again it's, the WHO has to do what by when so that we're all have



that transparency.

481

01:12:01.350 --> 01:12:07.110

Todd Cavanaugh: And that's what eliminates that thing, where we go man we've had this idea and we've been talking about it for four months.

482

01:12:07.410 --> 01:12:14.040

Todd Cavanaugh: But nothing keeps happening, well before the meeting is done, we already have that next step laid out that's where it becomes really, really powerful.

483

01:12:14.610 --> 01:12:23.610

Todd Cavanaugh: underneath that we've got a maybe a backlog or things that we want to talk about the next meeting, so if I don't have time to talk about everything you know, maybe i'll put it down.

484

01:12:24.600 --> 01:12:28.140

Todd Cavanaugh: put it down here, for now, and you know I could drag them back up next time.

485

01:12:28.530 --> 01:12:32.070

Todd Cavanaugh: And then finally down at the bottom, the original point of the question here was.

486

01:12:32.340 --> 01:12:42.180

Todd Cavanaugh: How is the sauna if you just want to kind of track your notes and minutes kind of thing and so there's different ways, you can do it so, for example, if let's say I use a Google drive.

487

01:12:42.570 --> 01:12:49.350

Todd Cavanaugh: Maybe I like to track my notes in a Google Doc that's fine so you can take it wherever you want to.

488

01:12:49.650 --> 01:12:53.280

Todd Cavanaugh: And then just attach it maybe to a task so anybody can find it.

489

01:12:53.550 --> 01:13:05.580

Todd Cavanaugh: Or you can just do the notes directly in the description of the task advantage, there being, then we could just search for any of the words that were in this and find this you know if we wanted to look back at something we talked about in the past.

490

01:13:06.300 --> 01:13:14.610

Todd Cavanaugh: So anyways that's kind of one workflow way that you can use meetings and keep everything in one place all right.

491

01:13:15.720 --> 01:13:26.820



Todd Cavanaugh: John asked how should we think about the difference between a team in a project, so a team is generally going to be the people that.

492

01:13:27.300 --> 01:13:32.940

Todd Cavanaugh: need access or that you want to have access to a group of related projects and so that's going to be.

493

01:13:33.750 --> 01:13:40.290

Todd Cavanaugh: It might, if you think of like a bigger organization, a lot of times, it might be like a whole department it's one of the ways I like to think about it so like.

494

01:13:40.620 --> 01:13:50.910

Todd Cavanaugh: Marketing or finance or accounting, a lot of times those might make sense, those kind of major chunks of work might make sense to be teams, but then, if you ever just find a bunch of.

495

01:13:52.710 --> 01:13:58.290

Todd Cavanaugh: projects that are on the same area, maybe you do a lot of events, and so you can create events team.

496

01:13:58.620 --> 01:14:06.750

Todd Cavanaugh: Just for yourself even like even if you don't have a whole don't think of team is like necessarily whole bunch of groups of people it's more like related projects, a project.

497

01:14:06.990 --> 01:14:14.850

Todd Cavanaugh: Then versus the teams just going to be that smaller component, a group of tasks around a certain cause or something like that, like an event.

498

01:14:16.530 --> 01:14:16.890

Todd Cavanaugh: Good.

499

01:14:17.790 --> 01:14:30.630

Stephanie Bogan: We kind of want to pause here for just a second because we talk a lot about rates we've talked about your annual plans turning those into quarterly priorities those priorities and become projects in a sauna.

500

01:14:30.960 --> 01:14:38.550

Stephanie Bogan: So you all are used to hearing me talk about this a lot, so I thought Todd This might be a really good place to just take a couple of minutes and I'm going to show you.

501

01:14:38.820 --> 01:14:48.030

Stephanie Bogan: both personally and in a team level how we use it and then Adam, I think, is going to show you how he uses it we did the same but I'm going to have Adam show you.

502



01:14:48.510 --> 01:15:03.330

Stephanie Bogan: As the advisor in practice, like how he's using it to manage those external relationships from a marketing perspective, because I know a lot of you are managing marketing teams and people, and so this is a place where that really can be helpful so i'm going to Todd if I can.

503

01:15:03.930 --> 01:15:05.550

Stephanie Bogan: Just share my stop sharing.

504

01:15:06.570 --> 01:15:10.470

Stephanie Bogan: My desktop my desktop all right, can you see my screen right now.

505

01:15:12.510 --> 01:15:13.380

Stephanie Bogan: Can everybody see it.

506

01:15:14.370 --> 01:15:14.820

yeah.

507

01:15:16.020 --> 01:15:22.050

Stephanie Bogan: So i'm in my inbox right now right so, how does the talking about coven, so this is basically.

508

01:15:22.560 --> 01:15:34.770

Stephanie Bogan: When when Todd talked about how your email box changes is because your internal communication all flows through here, so your inbox actually becomes your external right the world out there.

509

01:15:35.130 --> 01:15:46.320

Stephanie Bogan: which actually minimizes the amount in it by like 50% it's actually pretty staggering so your inbox tells you what your team is talking about this is actually a super cool feature, so I.

510

01:15:46.530 --> 01:15:52.350

Stephanie Bogan: When I do my daily inbox is on my calendar, so if you guys if we go to a regular week.

511

01:15:54.750 --> 01:15:56.400

Stephanie Bogan: September it's holiday.

512

01:15:57.690 --> 01:16:05.550

Stephanie Bogan: Right, so if you go to my calendar it's called this month obviously that's a retreat let's find a week, so you see these work blocks.

513

01:16:06.930 --> 01:16:15.750

Stephanie Bogan: These are all directly from a sauna so all of these are coming directly there's Adams birthday on September 30 hey i've got a call with my kisses for coaching.



514

01:16:16.200 --> 01:16:23.730

Stephanie Bogan: hey we're doing, like all so you can do all days, or, as I like to do you can actually block out your time, as you guys know that I do.

515

01:16:24.120 --> 01:16:31.560

Stephanie Bogan: So you can start to see right purple in my world means we got to change that because i'm speaking i'm doing the keynote can't be in two places at once.

516

01:16:31.830 --> 01:16:38.610

Stephanie Bogan: So it integrates for me, you can see my right my personal stuff is on here, but it integrates for me.

517

01:16:39.090 --> 01:16:47.100

Stephanie Bogan: The what my business priorities are and how what the team's priorities are and how that translates into what i'm doing today.

518

01:16:47.640 --> 01:16:53.970

Stephanie Bogan: So if I take something and I assign a time to it, it will show up on my calendar and vice versa.

519

01:16:54.780 --> 01:17:04.710

Stephanie Bogan: Which is really nice, so you can have your task list up here at the top, like you're the things that have to be done today right hey I got to hear back from Michael on this and it literally clicks back through.

520

01:17:05.460 --> 01:17:11.760

Stephanie Bogan: To the assign a task so that's one of the features that I really, really like and then, if you go back to.

521

01:17:12.330 --> 01:17:20.670

Stephanie Bogan: meetings, for example, my task for the day or here right so i've got some notes that i've got to enter But, all in all, largely cut right here's everything on my calendar.

522

01:17:21.420 --> 01:17:28.230

Stephanie Bogan: you've got reporting right, so any reports that you want to see, and then you can see my favorites right, so this is my daily huddle.

523

01:17:28.620 --> 01:17:39.810

Stephanie Bogan: So we talked about a lot meeting with your team and meeting with your rockstar right hand or your Chief of Staff or your practice manager, whoever that person is so this is what I do in my daily huddle.

524

01:17:40.560 --> 01:17:44.880

Stephanie Bogan: And so, literally I just always know what's coming up right i'm seeing a lot this fall.



525

01:17:45.210 --> 01:17:54.150

Stephanie Bogan: Chief of Staff here the things that Lisa needs to review with me daily like here's everything in motion here stuff the team has for me if they needed to grab time on my calendar.

526

01:17:54.570 --> 01:18:01.560

Stephanie Bogan: Here stuff we're just keeping tabs on right travel, so you can customize these to todd's point to your preference but.

527

01:18:01.770 --> 01:18:08.700

Stephanie Bogan: it's an integrated cohesive dashboard so whether it's you or all of your team or someone on your team or vendors.

528

01:18:08.970 --> 01:18:14.010

Stephanie Bogan: You can get any view that you want here's our team weekly huddle what we call our gst meeting.

529

01:18:14.310 --> 01:18:23.220

Stephanie Bogan: Right here's everything that's operationally happening here's what's on the agenda here's our reporting review here the upcoming events, the things we need to talk about.

530

01:18:23.760 --> 01:18:30.810

Stephanie Bogan: Our program meetings so if you've got a marketing group, even if that marketing group is you and your part time virtual assistant it's a marketing group right.

531

01:18:31.050 --> 01:18:41.970

Stephanie Bogan: Your engagement group or your client services, even if it's you or you in two people right it's what's happening with clients that what that might be outside of your CRM right or Bigs are here.

532

01:18:42.960 --> 01:18:52.950

Stephanie Bogan: The things that we're working on for this week's agenda or here related to program ongoing priorities operational things status check so again, you can customize it any way that you want.

533

01:18:53.700 --> 01:18:57.870

Stephanie Bogan: amy's taking a couple months off as you guys know for family leave so we created.

534

01:18:58.170 --> 01:19:05.640

Stephanie Bogan: For your HR processes and your marketing processes is great we created a board called transitions you can it's a client transitions, by the way.

535

01:19:06.000 --> 01:19:15.240

Stephanie Bogan: Where it was everything that was active things that amy was keeping pre transition things that she



was handing over to marketing things she handed over the tech things she handed over to Program.

536

01:19:15.600 --> 01:19:21.420

Stephanie Bogan: etc, and we literally over the course of a few weeks went through this list until everything was offered or cleared.

537

01:19:22.770 --> 01:19:31.320

Stephanie Bogan: Our marketing meetings are in here here's everything right here are the Bigs here the upcoming events here's the agenda so you're going to start to see a really boring pattern here.

538

01:19:31.920 --> 01:19:39.060

Stephanie Bogan: hey, what are the big things on the agenda what's on the agenda this week and engagement rate at what a minute memory issues hey stephanie it's called.

539

01:19:39.330 --> 01:19:54.450

Stephanie Bogan: All right, great, we need to talk to Tony about X all right hey ben's birthday is coming up so it's a really nice way here's everything that's happening operationally right here's everything in motion with our graphic designer right that is in research design board.

540

01:19:56.400 --> 01:19:59.910

Stephanie Bogan: it's on here somewhere yep so here's all the stuff that's active right so.

541

01:20:00.300 --> 01:20:09.420

Stephanie Bogan: I can quickly see everything that we have to review because it's in this column, and everything that the designers working on because it's new column everything we haven't priorities, because it's over here.

542

01:20:10.020 --> 01:20:23.820

Stephanie Bogan: So it starts to give you a really good sense of what's the company work, which is what you all want to know, like what is on the business radar right now that I need to babysit and pay attention to.

543

01:20:24.360 --> 01:20:31.500

Stephanie Bogan: Without spending an hour and a half in emails and babysitting people every day, which is what we all desperately want to avoid.

544

01:20:31.890 --> 01:20:39.330

Stephanie Bogan: And you avoid that when you create a common language, which means you and the other party, whether it's an internal team Member or an external team Member.

545

01:20:39.690 --> 01:20:48.240

Stephanie Bogan: knows what's happening and who's doing what by when, because then it's abundantly clear black line, whether it got done or not now.

546



01:20:48.720 --> 01:20:58.380

Stephanie Bogan: here's The one thing I want to make sure I show you and then i'm going to turn over to Adam so no one no person no process your project your priority or perfect things break down.

547

01:20:58.920 --> 01:21:08.940

Stephanie Bogan: But because you all know that I have a system for everything I needed a system for the breakdowns and with the first thing I went to when I wanted a system for my breakdown was what.

548

01:21:10.170 --> 01:21:13.320

Stephanie Bogan: I went to a sauna So if I share my screen again.

549

01:21:15.420 --> 01:21:16.230

Stephanie Bogan: Go back.

550

01:21:17.970 --> 01:21:21.330

Stephanie Bogan: I created a section called breakdown brief where's my breakdown brief.

551

01:21:26.580 --> 01:21:32.670

Stephanie Bogan: and break down briefs are to todd's point you can do the board, I like boards i'm super visual.

552

01:21:33.450 --> 01:21:42.870

Stephanie Bogan: So here's the board in a team huddle, but if you go back over to this list, and you look at the breakdown brief section, this is a part of our weekly team meeting as part of the first things we do.

553

01:21:43.410 --> 01:21:53.370

Stephanie Bogan: Somebody owns it and I literally said, this is our system for dealing with breakdowns so we're going to discuss them we're going to define them we're going to deal with them on an active weekly basis.

554

01:21:53.580 --> 01:22:00.900

Stephanie Bogan: So that stuff gets handled and there's no more like I don't know I don't know, do you know I don't know what none of that around here so.

555

01:22:01.170 --> 01:22:03.780

Todd Cavanaugh: that's good stephanie that's really good that's cool that's.

556

01:22:04.050 --> 01:22:07.470

Stephanie Bogan: Really so tiffany's got a version of this that they created like we had.

557

01:22:07.530 --> 01:22:15.060

Stephanie Bogan: Prospects reach out to the website and Lo and behold, we didn't get the emails so I literally went in and created a breakdown brief.



558

01:22:15.690 --> 01:22:21.960

Stephanie Bogan: And then said okay here's the model for a breakdown brief i'm not leaving it to chance what's the breakdown.

559

01:22:22.590 --> 01:22:30.960

Stephanie Bogan: here's what broke down here's my concern hey We said we send an email, but we didn't and then it turns out like Lisa did send the email it got sent to spam so was it.

560

01:22:31.200 --> 01:22:38.520

Stephanie Bogan: Good Lisa not follow up to the tech breakdown did spam casually we thought to understand the source of the problem, so here are my concerns.

561

01:22:39.120 --> 01:22:47.100

Stephanie Bogan: As the business owner right like here's great So whoever does it shares their concerns and then, what are the next actions like what are we going to do about it.

562

01:22:47.490 --> 01:22:50.610

Stephanie Bogan: And then someone in the organization in this case, Nicole.

563

01:22:51.360 --> 01:23:01.230

Stephanie Bogan: Is our OPS manager aka ninja as we like to call her is then tasks, this is the part I love more than life itself For those of you that have someone that can do this.

564

01:23:01.710 --> 01:23:11.670

Stephanie Bogan: i'm not in the breakdown brief I just go hey Nicole hey person at rate at at Nicole at like hey what happened here blah blah blah.

565

01:23:12.180 --> 01:23:20.670

Stephanie Bogan: And then, it just happens, and then I go please give me a status report and then Lo and behold status report show up at the bottom.

566

01:23:21.210 --> 01:23:35.610

Stephanie Bogan: I go Okay, thank you very much, right system, and then you actually have the ability to resolve the problem, so this is the beauty to me of the sauna is to to todd's point I can take this Michael next piece, I can add it.

567

01:23:36.180 --> 01:23:42.270

Stephanie Bogan: To if I were in marketing I could add to the marketing huddle I could put it under right like opportunities.

568

01:23:42.630 --> 01:23:51.030



Stephanie Bogan: If this were one of you, I could attach it to your Member card so that that breakdown somewhere else would show up in your car and we would all know what was happening.

569

01:23:51.330 --> 01:23:59.790

Stephanie Bogan: So it's very much like the CRM version of with clients you get the workflows you get the processes, but you get the real time engagement and interaction.

570

01:24:00.090 --> 01:24:07.350

Stephanie Bogan: And I think to todd's point you can timeline it, you can board it, you can report it, you can pretty much do anything with it, which is why we like it so much.

571

01:24:08.550 --> 01:24:18.720

Stephanie Bogan: So i'll stop sharing and then I just think that's it maybe I hope I helpful translation in how do you imagine the client weekly meeting here are the projects that we're working on.

572

01:24:19.380 --> 01:24:28.170

Stephanie Bogan: Right or your marketing meeting, so I use it very much to manage my personal time and attention in terms of those daily huddles and my calendar.

573

01:24:28.590 --> 01:24:36.150

Stephanie Bogan: And then it that the thing I like about that is that integrates them seamlessly with the team view and then ultimately the business view when you get into the reporting.

574

01:24:36.690 --> 01:24:42.510

Stephanie Bogan: I didn't show you the reporting or the priorities but us on it has lots of cool reporting and priorities features they've now got.

575

01:24:42.840 --> 01:24:50.580

Stephanie Bogan: i'm super excited Adam you'll love this and integration with loom so now when i'm sending video sending feedback off to the designer.

576

01:24:51.000 --> 01:25:01.410

Stephanie Bogan: Instead of putting comments in the in that thing which I can are going to loom and shooting a video I can literally click the button and sauna and be like hey Adam thanks for your feedback on this PowerPoint, what do you think about blah blah blah.

577

01:25:01.710 --> 01:25:09.180

Stephanie Bogan: I think we should tell the Members and and literally it's all there, integrated and the same thing with time tracking.

578

01:25:09.630 --> 01:25:21.390

Stephanie Bogan: So, in a sauna integrates with a lot of Todd can is the expert on that, but I presumed that they're continuously integrating with as much as humanly possible so that's The other thing that we like about it.



579

01:25:22.260 --> 01:25:27.240

Stephanie Bogan: Adam do you want to share a little bit about how you're using it to manage those external relationships.

580

01:25:27.930 --> 01:25:31.110

Adam Cmejla, CFP?: yeah i'm a little embarrassed to show my environment after seeing.

581

01:25:31.110 --> 01:25:31.440

The.

582

01:25:32.790 --> 01:25:36.360

Adam Cmejla, CFP?: The the i'm not even really sure what I just saw here so.

583

01:25:41.190 --> 01:25:46.440

Stephanie Bogan: I know you guys think i'm all like visually marketing, but I am asked allison I am the geek for this stuff.

584

01:25:46.470 --> 01:25:50.340

Adam Cmejla, CFP?: Because well and I thought I was, I mean I you know i've been doing this now with.

585

01:25:50.580 --> 01:26:03.990

Adam Cmejla, CFP?: An advisor 13 years but before that I was a quality assurance engineer in the pharmaceutical space so quite literally My job was making sure that if it wasn't or the model was if it's not documented didn't happen so we're litigious with our documentation in our firm and we.

586

01:26:04.290 --> 01:26:17.400

Adam Cmejla, CFP?: We are on each other if the first response is if someone asked a question i'm going to assume that it's not in red tail or that it's not in the sauna because by you coming here and asking me makes me.

587

01:26:18.060 --> 01:26:30.420

Adam Cmejla, CFP?: think that some someplace documentation didn't happen so anyway yeah i'll give the brief overview because it's not it's not nearly as in depth as what yours is, but I think the thing that I take away from it is mine doesn't have to be.

588

01:26:30.930 --> 01:26:41.370

Adam Cmejla, CFP?: i'm i'm it's solving it's doing what I needed to solve for, and so what we use it for, and there were a couple of questions in the chat about like.

589

01:26:42.390 --> 01:26:53.940

Adam Cmejla, CFP?: Everybody knows that we're big red tail users, etc, etc, so the model that we have is if it's



working in the practice with clients then it's in red tail if it's working on the practice practice management.

590

01:26:54.540 --> 01:27:00.390

Adam Cmejla, CFP?: Working with our external relationships my podcast producer my blog or my website designer va.

591

01:27:01.410 --> 01:27:02.490

Adam Cmejla, CFP?: i'm forgiving someone here.

592

01:27:04.260 --> 01:27:08.430

Adam Cmejla, CFP?: and got six relationships outside of the three internal relationships that are working in the firm.

593

01:27:08.850 --> 01:27:16.680

Adam Cmejla, CFP?: So a sauna is a great tool when you think about adding two different projects, so it just kind of walk through what we do here in mind.

594

01:27:17.100 --> 01:27:26.430

Adam Cmejla, CFP?: Like I said the like again we've already We already know that the inbox is great so kyle is my podcast producer so when we look at the 2020 money podcast.

595

01:27:26.730 --> 01:27:33.210

Adam Cmejla, CFP?: we've broken it down into three different sections, the current current completed Q, these are the episodes, as you can see, as I can see.

596

01:27:33.660 --> 01:27:43.770

Adam Cmejla, CFP?: I quickly, I can quickly see how much content I have backlog here are the ones that are scheduled are in production and then anybody that says that they can never get in any any ideas for content.

597

01:27:44.850 --> 01:27:50.460

Adam Cmejla, CFP?: I don't agree with that, because I have more than enough ideas for content podcast so as I.

598

01:27:50.850 --> 01:28:02.250

Adam Cmejla, CFP?: As I get these and as their one on as I want to move them up it's just simply drag and drop and move them wherever I want be I can then quickly assign it to kyle my podcast producer paying him on when i'm going.

599

01:28:02.730 --> 01:28:15.420

Adam Cmejla, CFP?: On when i'm going to schedule this so he knows this helps him batch record as well, so once I get you know i'll get 12 podcast recorded here in the next three weeks or so i'll schedule all those out he can do a back to production and then we're both under the podcast.

600



01:28:17.100 --> 01:28:22.890

Adam Cmejla, CFP?: Again, all of these are just going to be variations and theme we're not doing anything on branding designing collateral right now with.

601

01:28:24.180 --> 01:28:33.450

Adam Cmejla, CFP?: Greg Well now, who is our was our branding and website designer so we don't have anything going on right now blog newsletter and content, this is again just where I used to organize my thoughts.

602

01:28:34.110 --> 01:28:42.570

Adam Cmejla, CFP?: The website designer metric nerium a website designer is working on some things granted again these need to be updated, a little bit here outsource writing this is my.

603

01:28:43.260 --> 01:28:48.240

Adam Cmejla, CFP?: Emma geysers my outsourced content creators so she's also doing.

604

01:28:48.900 --> 01:29:06.480

Adam Cmejla, CFP?: Taking podcasts that we've done 2020 2020 money podcast and then just repurposing that content into blog posts, so the nice thing and i'm Todd by all means, if I can get some tips and pointers here, I am here to learn, I will be the I will build and learn in public here with you that.

605

01:29:06.570 --> 01:29:14.580

Adam Cmejla, CFP?: sounds great well this looks great what we do here, then, is that in 2020 money if i'm going to do something like let's say I want to transition patients from owner to associate.

606

01:29:14.850 --> 01:29:19.350

Adam Cmejla, CFP?: And I think that'd be a good idea, not only for the podcast but then I want to add that to.

607

01:29:20.160 --> 01:29:26.190

Adam Cmejla, CFP?: Ms project as well, I can just title that and let her know that that's going to be in the podcasts blog post she'll put the.

608

01:29:26.520 --> 01:29:39.210

Adam Cmejla, CFP?: Kathy will put the link to that podcast episode in the notes here Emma will get the email notification or the asana notification to come in and check here and we can manage that content accordingly here's my question again asking and public Todd here.

609

01:29:39.720 --> 01:29:49.470

Adam Cmejla, CFP?: This now is assigned to people if kyle complete this task before emma's done it should I create the outsource writing as more of a sub tasks.

610

01:29:50.190 --> 01:30:01.020

Adam Cmejla, CFP?: As because primarily we've used this for hit for kyle just recently we've started implementing Emma into this I don't want to maybe or maybe it's just a matter of duplicating the task and creating.



611

01:30:01.080 --> 01:30:17.850

Todd Cavanaugh: Two different projects yeah that's that's a great question, I think, for your specific case I would either use the task name is almost like the theme and then maybe create sub tasks that are your you know podcast blog post, whatever your different.

612

01:30:17.850 --> 01:30:18.600

Todd Cavanaugh: techniques are.

613

01:30:19.890 --> 01:30:31.140

Todd Cavanaugh: or or created a copy, then one task is maybe in the name says podcast but yeah I probably wouldn't in that case it was two people doing the same thing you probably wouldn't want them to.

614

01:30:31.200 --> 01:30:32.670

Adam Cmejla, CFP?: yeah to kind of share like they're like.

615

01:30:32.700 --> 01:30:35.400

Adam Cmejla, CFP?: they're they're independently related so.

616

01:30:35.460 --> 01:30:38.730

Adam Cmejla, CFP?: For that I feel like they're two different projects in two different environments anyway.

617

01:30:38.940 --> 01:30:43.650

Adam Cmejla, CFP?: The last thing that I wanted to emphasize here, and this someone commented in the chat.

618

01:30:44.310 --> 01:30:50.220

Adam Cmejla, CFP?: Anybody that knows or it's talked to me about productivity knows i'm a big believer and follower of David allen's work and getting things done.

619

01:30:50.520 --> 01:30:57.630

Adam Cmejla, CFP?: So I have built anything with the APP here a you can see the lock it's private to me or i'm really the it's not a public.

620

01:30:58.020 --> 01:31:08.130

Adam Cmejla, CFP?: Public environment so for these for agendas, this is what I use for anything that I want to connect with my team about, but I don't need to Ping them right away right it's important but not urgent.

621

01:31:08.550 --> 01:31:15.060

Adam Cmejla, CFP?: So i'll put this onto my own agenda, so when Kathy comes to me in our level 10 meeting every Monday morning Adam anything, a new.



622

01:31:15.360 --> 01:31:24.120

Adam Cmejla, CFP?: I just go right to my agenda, and this is a compilation of ideas, thoughts whatever I want to discuss with the team on Monday mornings during our Monday morning huddle.

623

01:31:25.110 --> 01:31:29.880

Adam Cmejla, CFP?: And then again anyway, this is just an implementation of David allen's getting things done.

624

01:31:30.570 --> 01:31:37.380

Adam Cmejla, CFP?: The emphasis on if you're going to implement this system, the key component that makes all this work is, you have to schedule your weekly review.

625

01:31:37.830 --> 01:31:43.650

Adam Cmejla, CFP?: getting things done, the is is a house of cards, if you don't schedule time to review.

626

01:31:44.010 --> 01:31:54.630

Adam Cmejla, CFP?: How you've accumulated all of this information right, how do you organize prioritize delegate walking through David allen's workflow a sauna you can build it very easily to use for.

627

01:31:54.990 --> 01:31:56.700

Adam Cmejla, CFP?: For David Allen getting things done, because.

628

01:31:57.210 --> 01:32:05.310

Adam Cmejla, CFP?: So much of us we struggle with just having things in our mind get it in a sauna organize it later and they're just the drag and drop whether do not the APP a tablet.

629

01:32:05.640 --> 01:32:13.500

Adam Cmejla, CFP?: On a computer moving it from one to the other is is really, really easy, last but not least, someone at one that someone matt Ping me.

630

01:32:14.220 --> 01:32:19.590

Adam Cmejla, CFP?: and asked about how much I had evaluated other platforms I poked around and trollope for a little bit.

631

01:32:20.040 --> 01:32:27.600

Adam Cmejla, CFP?: candidly there wasn't anything that I didn't like about trial I just found at the time, a sauna had had a few more bells and whistles and I think they just continue to add more.

632

01:32:28.170 --> 01:32:37.050

Adam Cmejla, CFP?: I looked at monday's as well, Monday almost seem to have a little bit too much horsepower for me and, in all honesty, a sauna when I started playing around with it a little bit I.



633

01:32:37.590 --> 01:32:44.370

Adam Cmejla, CFP?: It did whatever I needed it to do and I didn't spend a whole lot of time looking at any other platforms so.

634

01:32:44.910 --> 01:32:56.070

Adam Cmejla, CFP?: matt I don't have a whole lot there for you, other than just the more that we continue to use it the better and more efficient that it gets the last thing we do use internal projects right again working on the practice.

635

01:32:56.730 --> 01:33:06.840

Adam Cmejla, CFP?: This is easy for me to just add Kathy can go in and organize it later allows us to drag and drop builder you know we're doing a wall calendar for optometry clients, the holiday card for 2021 etc, etc.

636

01:33:07.170 --> 01:33:15.030

Adam Cmejla, CFP?: All of this is just really easy to do we managed hiring our associate advisor using this process of building out all of our.

637

01:33:15.330 --> 01:33:31.380

Adam Cmejla, CFP?: Our entire workflow of the hiring process, so you can do almost pretty much anything using this using this tool just get it somewhere don't manage it an email don't manage it in your head don't manage it on sticky notes or anything like that just get it into a system so.

638

01:33:32.340 --> 01:33:37.170

Stephanie Bogan: The under I think the the overarching issue and Adam and Todd are both really speaking to it.

639

01:33:37.170 --> 01:33:47.940

Stephanie Bogan: Is that there's a system for managing your systems right so you've got red tail and you've got your weekly meetings and you've got your prep checklist and you've got this but.

640

01:33:48.330 --> 01:33:59.580

Stephanie Bogan: what's the overarching system that you that you, as the person responsible for running the shop the shop and then the business and getting you like what's your tool or toolbox.

641

01:34:00.030 --> 01:34:08.160

Stephanie Bogan: And a lot of the tech that you're using isn't necessarily designed for that I think what you're seeing here, because we could do this for the next six hours is that I think to Adams point.

642

01:34:08.520 --> 01:34:14.520

Stephanie Bogan: A sauna will do the vast it hasn't i've yet to run into something I want to do in a sauna, but it will not do for me.

643

01:34:15.150 --> 01:34:20.250

Stephanie Bogan: which I feel really good about, but I want you to imagine like your work is always like a river that



just flowing.

644

01:34:21.090 --> 01:34:31.380

Stephanie Bogan: And what his son is really doing is it's bringing order and organization to that we put the boat we've got a system for what boxes go into the boat and when they go down the river and what Doc they stop at.

645

01:34:31.680 --> 01:34:44.280

Stephanie Bogan: The next port and they get off at this it's literally a workflow distribution and communication tool right it's a system for how you manage everything that happens outside of to Adams point.

646

01:34:44.670 --> 01:34:52.560

Stephanie Bogan: Anything that is processed defined by your your specify your specialized workflow systems right your your red tails your wealth boxes, etc.

647

01:34:54.060 --> 01:35:02.700

Stephanie Bogan: So, think about it through the lens of this is my dashboard that tells me and we even get into the priorities and the dashboards the reporting.

648

01:35:03.000 --> 01:35:10.770

Stephanie Bogan: That we're getting into because, again I fully get on this stuff and you guys literally are just APP for most of you at Level one which is.

649

01:35:11.130 --> 01:35:24.690

Stephanie Bogan: How do I create clarity between me and the team internal and external about what is on the radar what's active right now what's the status is what's active, is it on track.

650

01:35:24.990 --> 01:35:30.360

Stephanie Bogan: And how do we create a system for raising the flags and creating the transparency we need.

651

01:35:30.750 --> 01:35:37.380

Stephanie Bogan: To move it down the track in an orderly organized way that gives us the sense of time and priorities.

652

01:35:37.710 --> 01:35:44.220

Stephanie Bogan: And as you saw you can get time blocks, you can get calendars you can get aboard flow, you can drag and drop things is really cool.

653

01:35:44.700 --> 01:35:55.770

Stephanie Bogan: and not to be underestimated, is that tagging feature, because in smaller firms right a lot of the things that we do touch 18 things so you can put something in your marketing meeting.

654



01:35:56.460 --> 01:36:01.050

Stephanie Bogan: tag it to your program meeting put it in your development meeting put it in your service model Q.

655

01:36:01.350 --> 01:36:08.910

Stephanie Bogan: And all those tags let it just show up wherever you need it to show up, which is one of the simplest features, but I personally love so much.

656

01:36:09.270 --> 01:36:26.250

Stephanie Bogan: So again, this isn't necessarily in a sauna commercial per se, but I think two paths question we've looked at a sauna we've had we have clients that use everything and a sauna really has been I think as we've gone through that process sort of the the tool that has emerged as relevant.

657

01:36:28.170 --> 01:36:35.520

Stephanie Bogan: With intuitive right, it does not take their advanced features, you really can spend time on and Todd can help you with and I strongly encourage you to do that.

658

01:36:35.790 --> 01:36:40.980

Stephanie Bogan: But when you get into it and setting it up you like it's intuitive you can figure it out and then.

659

01:36:41.250 --> 01:36:50.730

Stephanie Bogan: Truly it's about unleashing the horsepower like that and that's what we're doing with Todd that's what we'll do with Adam and tiffany right, so the idea is, as we hit next year.

660

01:36:51.180 --> 01:37:01.170

Stephanie Bogan: And we work with Adam and tiffany on the best practices and a lot more of the crowdsourcing that we've talked about, we talked a lot about it at the boot camp will work with you guys and right Todd to be like hey.

661

01:37:01.620 --> 01:37:09.180

Stephanie Bogan: here's a good weekly meeting template here's a good marketing project template here's a good podcast template so that we can ultimately get to a point where we can hand you.

662

01:37:09.570 --> 01:37:20.670

Stephanie Bogan: A starting point, but hopefully today's call really gave you some insight into what it takes to successfully manage progress which is just another form of change, which is clarity.

663

01:37:21.030 --> 01:37:26.640

Stephanie Bogan: that's all the lessons we've talked about so if you need help there revisit those reach out to me transparency.

664

01:37:26.820 --> 01:37:35.190

Stephanie Bogan: Which is what a sauna I find is really exceptional at, and you can see, you can get as much transparency as you're willing to invest time and energy into it.



665

01:37:35.670 --> 01:37:48.660

Stephanie Bogan: And I would say, really is when you think about the businesses that i've built and scaled and leverage, they all every single one of them get those premiums, because we can institutionalize.

666

01:37:49.020 --> 01:37:56.700

Stephanie Bogan: The special if you cannot scale your special if you cannot replicate your special, then you are always going to be required.

667

01:37:57.060 --> 01:38:08.070

Stephanie Bogan: Which is just a time constraint and you're always going to be revenue constrained because there's only so much of you in terms of units of time, so when you start to automate the flows and the special.

668

01:38:08.400 --> 01:38:14.220

Stephanie Bogan: And like we've got a great hiring process like we've developed it over 28 years like it's pretty rock solid.

669

01:38:14.760 --> 01:38:23.190

Stephanie Bogan: I have very little to do with that process because there's define it is documented it's in a sauna the steps are there, the workflows are there, the work sample requests are there.

670

01:38:23.550 --> 01:38:36.360

Stephanie Bogan: And the team is able to take the the process that i've built and implement it with the same amount of rigor and get pretty much the same result and that's what you ultimately want it, for, so it really is a tool.

671

01:38:36.990 --> 01:38:43.050

Stephanie Bogan: Whether you use our project manager the spreadsheet will work in in conjunction with ongoing meetings.

672

01:38:43.710 --> 01:38:54.870

Stephanie Bogan: It won't do the whoopee stuff you can't tag multiple projects and sections, but you can absolutely have a spreadsheet of here's what we're working on here's what the task is it's the same fundamentals.

673

01:38:55.170 --> 01:39:02.850

Stephanie Bogan: A sauna just when you think about that bionic business lesson is one of those tech tools that integrates with what we've been doing manual.

674

01:39:03.120 --> 01:39:09.150

Stephanie Bogan: To get you that right \$6 million man result were suddenly I as a business owner as a coach.

675

01:39:09.360 --> 01:39:18.750

Stephanie Bogan: As a leader as a manager can click a button and see what i'm supposed to be doing what everyone else is supposed to be doing and oh my God the \$10 million question.



676

01:39:19.170 --> 01:39:29.850

Stephanie Bogan: Are we on track and then my favorite part can we build a system for creating accountability, we have breakdown briefs and every meeting here's what happened everybody here's what we learned.

677

01:39:30.180 --> 01:39:33.360

Stephanie Bogan: Everybody here's what we did to fix it everybody.

678

01:39:33.690 --> 01:39:41.910

Stephanie Bogan: that now we have really institutionalized that learning and we've got a tracking and reporting system in place so that if it happens 19 times, not so much the case here.

679

01:39:42.180 --> 01:39:45.990

Stephanie Bogan: But if it does, we now have the ability to like hey, why does this keep happening.

680

01:39:46.830 --> 01:40:00.600

Stephanie Bogan: So you can use it in any way that really fits you more than I want to share with you that there's a way I want or one way, I want to share with you that there is a way for you to leverage people.

681

01:40:01.200 --> 01:40:10.290

Stephanie Bogan: project management in terms of setting your priorities and then software tools spreadsheets hopefully an integrated automated something like a sauna if not a sauna.

682

01:40:10.650 --> 01:40:16.650

Stephanie Bogan: To really elevate the way that you manage change that it's more efficient and it's more effective.

683

01:40:17.070 --> 01:40:26.370

Stephanie Bogan: It comes with a lot more ease and, quite honestly, when you get there, it just makes the whole process, a lot more enjoyable because either the organization and people move up together.

684

01:40:26.880 --> 01:40:35.850

Stephanie Bogan: or people and projects move out that is it's a forcing mechanism for the things that we say we want to create in our business so with that.

685

01:40:36.150 --> 01:40:47.430

Stephanie Bogan: I want to be mindful of our time on I think Todd we will make sure that you all have his information if you guys want to follow up with Todd, let us know wall so put his information in the inbox insights if you want to talk to him more.

686

01:40:47.430 --> 01:40:51.300

Todd Cavanaugh: About I could I add one thing stephanie I had one thing when you're done.



687

01:40:52.020 --> 01:40:56.040

Todd Cavanaugh: Real quick, I see a bunch of questions I know we're we're out of time, but.

688

01:40:56.400 --> 01:41:03.390

Todd Cavanaugh: Real quick in terms of you know, a sound is not paying limitless this like she says not a commercial, but we do think this is a great tool.

689

01:41:03.690 --> 01:41:14.580

Todd Cavanaugh: want to give you just a few things you can do if you want a free 30 day trial of it just had to project management pros.com slash trial Okay, so if you want to just try it out.

690

01:41:15.120 --> 01:41:23.310

Todd Cavanaugh: I also want to just you know real quick, so there is, I have a whole online course there's a lot of questions hey if I hire someone, how do I get them up to speed.

691

01:41:23.610 --> 01:41:30.240

Todd Cavanaugh: A sauna has some free stuff I feel like I put together, something that will get them up to speed better and faster so.

692

01:41:30.570 --> 01:41:37.380

Todd Cavanaugh: I wanted to do something special today so there's 50% off of that you go to product management pros COM slash limitless.

693

01:41:37.650 --> 01:41:49.200

Todd Cavanaugh: For two days, if you want to just get into that and then the last thing i'll just mention real quick as, again, I wanted to try to do something special to get people going, because I know there's a lot of people that this will make a big impact for so.

694

01:41:50.190 --> 01:41:58.980

Todd Cavanaugh: Again, just for until Friday have a special thing here you if you want the master the whole online course that you can take as a team or individually.

695

01:41:59.250 --> 01:42:05.490

Todd Cavanaugh: The lifetime subscription two hours of talking through what you're trying to track and actually setting it up.

696

01:42:05.940 --> 01:42:12.060

Todd Cavanaugh: In our day virtual training workshop if you went on to our website, right now, you can book it for 1800 dollars.

697

01:42:12.690 --> 01:42:21.540



Todd Cavanaugh: If you add all of that up, it would be 3347 i'm slashing over 1500 dollars off it so it's less than 1800 dollars, I really think that would get you guys going.

698

01:42:22.170 --> 01:42:32.820

Todd Cavanaugh: Very well, I just need to hear from you by Friday, if you want to do that so anyways i'll leave that could just go I knows a bunch of questions, so thank you stephanie i'm really and everyone Thank you so much for being here, let me.

699

01:42:33.030 --> 01:42:39.840

Stephanie Bogan: know time super appreciate it you guys we actually did that training with Todd which was really helpful because there's just.

700

01:42:40.650 --> 01:42:50.070

Stephanie Bogan: We always talk about this with tools and software, which is the training is as important as the tech purchase because you only get into and get out of anything what you put into it so.

701

01:42:50.460 --> 01:42:57.000

Stephanie Bogan: If that makes it a little bit easier for you obviously that's pretty it's pretty nice deals to take advantage of it if it's helpful to you.

702

01:42:57.330 --> 01:43:06.360

Stephanie Bogan: If you want to reach out on trying to Adam awry around just you know how we're using and, in general, please feel free to do that, but I hope, what we really were able to accomplish today, not what you were.

703

01:43:06.630 --> 01:43:20.550

Stephanie Bogan: Perfect specific system is but really giving you a sense of as you manage people either with the tools that we've got eight the manual versions, but ideally with a more bionic since we're on a version.

704

01:43:21.150 --> 01:43:32.880

Stephanie Bogan: With something like a sauna that really allows you to take a lot more of an empowered approach to managing not just your priorities as these things that we say we want to do, each year, but how do we turn.

705

01:43:33.240 --> 01:43:42.060

Stephanie Bogan: Those ideas into implementable operational plans that move the ball down the field and get things done, which is what we're all about here so Todd.

706

01:43:42.420 --> 01:43:49.020

Stephanie Bogan: Thank you very much for taking the time with us today, Adam thanks for sharing your how you're using it, I hope, it was helpful to all of you.

707

01:43:49.650 --> 01:43:59.220

Stephanie Bogan: look forward to continuing the conversation on tribe and todd's been great to work with, if you have questions or want to reach out to us do not hesitate to reach out to him he's been a great resource.



708

01:43:59.700 --> 01:44:10.830

Stephanie Bogan: And with that, I wish you all well as you contemplate how you can better manage people projects in priorities and way that help you to truly move the Needle, because that is what we're all about here with that.

709

01:44:11.190 --> 01:44:14.820

Stephanie Bogan: I wish you all a fantastic Monday and I will talk to you soon have a great day.

