

LIMITLESS Coaching Call Transcript

SEPTEMBER 13TH, 2021
LIMITLESS COACHING CALL
PRODUCTIVITY REVIEW

65

00:20:49.050 --> 00:20:57.720

Stephanie Bogan: And when you get to that good vibe in place, whether it's your thought habits your behavior habits, where your business habits, that is when the magic happens so that.

66

00:20:58.110 --> 00:21:05.010

Stephanie Bogan: Is what I actually want to talk to you guys about today we after the productivity retreat really talked about creating.

67

00:21:05.850 --> 00:21:12.000

Stephanie Bogan: higher productivity, with our people with our process and with our craft platform, so I want to wrap all that up.

68

00:21:12.300 --> 00:21:27.540

Stephanie Bogan: we've talked last week or last call about projects and priorities and the sauna and all you know kind of the the nuts and the bolts, and so I want to call this our productivity review, and this is really about when you think about productivity it's about two things just two things one.

69

00:21:28.830 --> 00:21:38.010

Stephanie Bogan: You as a unit right so Michael kisses and I talked about this in the in the summer series webinar around the coaching that we've done, how does he create next growth.

70

00:21:39.120 --> 00:21:48.810

Stephanie Bogan: You have two variables, why do you have a unit of time right Brian Clinton jail, if you are on your own which, in an example you're not right, but if you're on your own as an advisor.

71

00:21:49.170 --> 00:22:03.750

Stephanie Bogan: No other advisors, no other income engines like to call them if you're on your own, then the only way for you to make more money is to maximize the value of your unit of time right your rate per hour in professional services right josh right Costa county.

72

00:22:05.130 --> 00:22:16.890

Stephanie Bogan: Only so now, you can become awesome you can literally write as a unit of time Max that to 10,100 like you can get really, really good at that, but in the construct of an advisory firm.

73

00:22:17.370 --> 00:22:32.670



Stephanie Bogan: There is sort of even at your highest point of awesome limitless stephanie has worked all her mojo on you, if you're not doing scale stuff there is a unit of time that you can Max out at somewhere on average honestly between one and a half and 2 million.

74

00:22:34.530 --> 00:22:40.350

Stephanie Bogan: And that's you know to one and a half to 2 million you really do have a team around you and ideally right you're going to have that service advisor.

75

00:22:41.190 --> 00:22:52.560

Stephanie Bogan: So, but they're not income producing in terms of the great growing revenue so you've got your unit of time how much can Brian for the hours, he puts in what's the economic, financial, yield that he can create.

76

00:22:53.010 --> 00:22:59.520

Stephanie Bogan: We can do a lot with that, but there is right, I like I don't spend magic like there is a limit to that Aaron right.

77

00:22:59.940 --> 00:23:16.740

Stephanie Bogan: Then the second measure of economics growth possibility is leverage and we talked a lot about this in different forms right your mindset your time but we're really talking about unit of time is how you use your time after that it's all about leverage people process and platform.

78

00:23:17.760 --> 00:23:21.120

Stephanie Bogan: Right packaging from a differentiated skilled marketing perspective.

79

00:23:22.080 --> 00:23:29.880

Stephanie Bogan: So those are the two very you know the realms that you have right there's Clinton right and there's Dan and there's Kevin what you can do with you.

80

00:23:30.510 --> 00:23:36.240

Stephanie Bogan: And there's what you can do when you add around you leverage that's our job.

81

00:23:36.750 --> 00:23:40.290

Stephanie Bogan: Now we have all these ideas and attitudes about people, about people.

82

00:23:40.500 --> 00:23:49.980

Stephanie Bogan: With them, you know all the mindset stuff right I can't manage people it's hard if I grow, it will be bad I don't like systems they depersonalize like all the bullshit i'm like i'm really honest me today guys.

83

00:23:50.340 --> 00:23:54.030

Stephanie Bogan: All the stuff we tell ourselves none of that shits true none of it.

84



00:23:54.840 --> 00:24:02.220

Stephanie Bogan: Alright, so I want you to get really clear as what we're talking about today is a review productivity, obviously this is totally uncensored.

85

00:24:02.520 --> 00:24:12.930

Stephanie Bogan: Because I literally didn't even do the Asterix I was like this is what today's call is about managing people projects and priorities from the realm of how do you actually get the right shit done.

86

00:24:13.800 --> 00:24:19.950

Stephanie Bogan: Now, a lot of you spend a lot of time doing stuff I spend time doing stuff I can look back at the year of coven and be like oh.

87

00:24:20.250 --> 00:24:31.020

Stephanie Bogan: That was actually something I did that didn't actually move the frickin needle they felt like it did in the moment right and we get closer and closer and closer to that perspective, we get better and better and better business.

88

00:24:31.620 --> 00:24:43.560

Stephanie Bogan: So you're on your first for foremost biggest job, the thing I can most teach you, aside from that belief is your greatest currency right josh knows that's number one Steve number two is how do you get the right shit done.

89

00:24:44.580 --> 00:24:51.600

Stephanie Bogan: If you believe in yourself and your ideas and your possibilities and you know how to get the right shit done guess what is inevitable Trent.

90

00:24:53.160 --> 00:25:00.390

Stephanie Bogan: Like that's it guys that's everything you need now there's a lot that goes into that I totally get it that's why you're here, some of you here for a couple years.

91

00:25:00.660 --> 00:25:10.620

Stephanie Bogan: So I don't want to be like a la la la, but I just I so want to connect you with you as a unit of time and you as a function of leverage that's all you've got that's it.

92

00:25:11.520 --> 00:25:16.650

Stephanie Bogan: But when you get clear on that it allows you to understand it's about what you want to do.

93

00:25:17.070 --> 00:25:22.770

Stephanie Bogan: Who you're doing it with and how do you get the right shit done so let's talk first about you, I put some slides together.

94

00:25:23.160 --> 00:25:29.490

Stephanie Bogan: But the truth is this is really the conversation like, how do we create the momentum to get stuff



done.

95

00:25:30.300 --> 00:25:45.690

Stephanie Bogan: So here's what I want you to know we've talked about this in various forms, over the quarter, but said Kathy I want you guys to get super clear on this, like there are things that I tell myself asked my team all the damn time, why do I tell myself those things, all the time, Tom.

96

00:25:48.930 --> 00:25:59.160

Stephanie Bogan: don't wait for Tom to unmute himself Why am I constantly telling myself these little things Why am I constantly telling you guys all these little things success success is a diet, why.

97

00:26:00.360 --> 00:26:01.230

Tom Castillo CFP®, CKA®: Because we forget.

98

00:26:01.920 --> 00:26:10.620

Stephanie Bogan: Because our conscious behavior is not in charge, most of the time, we are constantly constantly working against our habits for thought habits.

99

00:26:11.070 --> 00:26:17.430

Stephanie Bogan: Right, right here this realm is 95% of it, you know that if you did doubted that you not be here right now.

100

00:26:18.390 --> 00:26:25.680

Stephanie Bogan: Right now how we connect with that is the work right or behavior habits, how we show up are we on email, are we putting pizza in our mouth too much are we.

101

00:26:25.890 --> 00:26:32.820

Stephanie Bogan: hitting the gym in the way that we say we want to are we charging the right fees to the right clients, because we believe right we have behavior to back it up.

102

00:26:33.150 --> 00:26:40.590

Stephanie Bogan: And our business habits right do we have defined models behaviors for our time and our staff and our fellowship we know we're supposed to be doing.

103

00:26:41.130 --> 00:26:48.600

Stephanie Bogan: Like you guys aren't here, because you don't know what you're supposed to be doing right like it's on Google you're here because doing it's really hard.

104

00:26:49.230 --> 00:26:57.030

Stephanie Bogan: And what i'm trying to break down for you is it's not as hard as we think it's just hard in a very different way, and when you're willing to do that work stuff gets so much easier.

105



00:26:57.330 --> 00:27:08.640

Stephanie Bogan: So rule number one is success is a diet, this is that little thing literally I asked my husband is so damn annoying my for family successes diet success as a diet and that's what we put in their bodies it's what we.

106

00:27:09.030 --> 00:27:22.080

Stephanie Bogan: You know, but that diet is defines who we are and how we show up and what we achieve what's in your diet, so when you think about managing people projects and priorities, what you're really talking about is getting shit done which starts with you.

107

00:27:23.100 --> 00:27:26.610

Stephanie Bogan: So this is that personal check in on all the things we've talked about.

108

00:27:27.030 --> 00:27:41.490

Stephanie Bogan: And you're getting incrementally better, and this is not a judgment it's a just come to Jesus about where you are, and you guys are kicking butt this year, by the way, truly, but my job is to constantly keep it in your face for the APP level I love that josh.

109

00:27:43.620 --> 00:27:50.040

Stephanie Bogan: somebody please read them by that says that because they swear to you it's sort of god's favorite word, do you like.

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00:27:50.340 --> 00:27:57.330

Stephanie Bogan: there's 27 words for ice and the eskimo language but i'm pretty sure that there's more than more than 27 versions of the F word and.

111

00:27:58.020 --> 00:28:05.490

Stephanie Bogan: In the in the English language and, by the way, they've done a study that actually shows, please don't take this personally, that your ability use.

112

00:28:06.030 --> 00:28:13.890

Stephanie Bogan: curse words into it's a sign of intelligence so apparently i'm really, really smart if you hang out with me after a couple of tricks show no all right um.

113

00:28:14.460 --> 00:28:25.350

Stephanie Bogan: So habit is this thing that we do, that is a repeat behavior that we ultimately don't have to think about anymore right you pick up your phone you go to the bathroom you write you like, whatever you do you do.

114

00:28:25.800 --> 00:28:30.990

Stephanie Bogan: Our job here is to challenge that condition behavior the thought habits.

115

00:28:31.410 --> 00:28:40.260

Stephanie Bogan: What are we thinking, because that creates the possibility set that we operate in and the decisions were willing to make and the choices and the leaps that we're willing to take.



116

00:28:41.040 --> 00:28:53.580

Stephanie Bogan: Thank you Josh to those behavior habits, I want you guys to check in this is the hard not easy truth like are you managing your time, it is the greatest revenue producing us that you have outside of your belief system.

117

00:28:54.240 --> 00:29:00.150

Stephanie Bogan: Your time system is it if you are squandering half your time, I can only help you so much.

118

00:29:01.170 --> 00:29:12.180

Stephanie Bogan: now ask my team I'm constantly managing time I'm looking at my schedule I'm evaluating it we're learning we're growing, it is a constant conscious part of this business.

119

00:29:12.960 --> 00:29:24.810

Stephanie Bogan: Like there's constantly conversations about my time the model schedule what's working what's not working, how we leverage time how we add the most value in time but economic return on time, like that's a constant conversation.

120

00:29:25.770 --> 00:29:29.880

Stephanie Bogan: Why is it a constant conversation, because I am abundantly clear.

121

00:29:30.990 --> 00:29:33.240

Stephanie Bogan: That I only have two kinds of time I have work time.

122

00:29:35.100 --> 00:29:42.180

Stephanie Bogan: Right I call it contribute time like just I'm in I'm giving them doing whatever and out of that comes some output in the rest of it is my personal time.

123

00:29:42.870 --> 00:29:53.640

Stephanie Bogan: And our personal times, the thing that we sacrifice when we get busy when we get overwhelmed right that's where we go, but your personal time I was talking with her last week, what if I told you, it was worth three times as much as your work time.

124

00:29:54.690 --> 00:29:58.980

Stephanie Bogan: Because later when I know cuz you know I wasn't around a little bit when it gets three on.

125

00:29:59.460 --> 00:30:06.930

Stephanie Bogan: Like I would give you a whole lot of money for that time and when we're older and we're on a deathbed guess we're all going to be saying hey I wish I'd use my time differently.

126

00:30:07.620 --> 00:30:13.860

Stephanie Bogan: And so the number two thing we can do, aside from believing that a better as possible and that we



have that power is to get control of our time.

127

00:30:14.370 --> 00:30:25.200

Stephanie Bogan: So right essentially ISM is about focusing on the few things that are going to really move the needle run the shop, the way that you're running the shop, but if you have for many years to take you to get here, and I can fix it in six months.

128

00:30:25.800 --> 00:30:33.030

Stephanie Bogan: make massive changes in a year your life and your business to be wildly different and then three, it can be radically different you guys know what's possible.

129

00:30:34.020 --> 00:30:47.790

Stephanie Bogan: Right, what are your behavior habits your journaling your performance your time, are you keeping yourself focused and engaged, are you doing this morning morning routines you know are using a success shifter, so this is your check in to.

130

00:30:48.810 --> 00:30:53.220

Stephanie Bogan: get really clear on how in that people part of the equation, you are the key people.

131

00:30:54.600 --> 00:31:00.360

Stephanie Bogan: Are you doing the things that you need to do, are you taking agency investing your time in the ways that are getting you the results that you want.

132

00:31:00.990 --> 00:31:11.700

Stephanie Bogan: And then, are you doing the other habits right are you in that success state versus that stress state overwhelmed or you offer your focus and opportunities So these are the places, I just want you to check in.

133

00:31:13.080 --> 00:31:25.320

Stephanie Bogan: Because again you guys are doing really good based on all of our data points experiential data is NPs scores conversations, but that does not mean that the work is not there, it doesn't mean the third pockets of you that aren't struggling.

134

00:31:25.920 --> 00:31:31.110

Stephanie Bogan: And so, when we talk about getting stuff done it's about understanding that it's about our belief system.

135

00:31:32.070 --> 00:31:38.730

Stephanie Bogan: it's about our time system because that's what creates our economics unit of time and leverage but it's that lens.

136

00:31:39.060 --> 00:31:48.540

Stephanie Bogan: And then it's our state which you've heard me talk about so much like are you in that success state where you're empowered and positive and if you're not that's Okay, I get there, too, I really do ask my team.



137

00:31:49.440 --> 00:32:01.680

Stephanie Bogan: The difference is I stopped myself acknowledge and i'm like wow i'm the line I need to get Ahold of this here's what's happening, I need to get perspective here's the learning how do I get back on track and that goes from taking years two weeks.

138

00:32:01.950 --> 00:32:10.740

Stephanie Bogan: Two months two weeks today's to sometimes minutes, sometimes second sometimes it happens in a flash i'm like oh my God that was so amazing that would have been me out for three weeks.

139

00:32:11.970 --> 00:32:27.540

Stephanie Bogan: But what I want you to know is that your body can do most anything which means you can create an experience you want, barring the laws of physics and Alex handled it others are really great testing those theories on a daily basis, but it's your mind, you have to convince.

140

00:32:28.560 --> 00:32:38.490

Stephanie Bogan: So, as we talk about people and projects and priorities that's the layout which is this is all functional it's all we can go through these slides as much or as little as you want.

141

00:32:39.240 --> 00:32:43.590

Stephanie Bogan: But when it comes to getting shit done, I was having a conversation, this is not going to be.

142

00:32:44.010 --> 00:32:49.860

Stephanie Bogan: This is one of those right people love these, I guess, this is really one of those hot seat conversations I was having a conversation with someone.

143

00:32:50.280 --> 00:33:00.450

Stephanie Bogan: And he said I really, really, I need to figure out a way to make it was 15,000 more dollars I didn't really, really need to make it make find a way to make \$15,000 to do this thing.

144

00:33:01.470 --> 00:33:02.370

Stephanie Bogan: And I said no, you don't.

145

00:33:05.100 --> 00:33:07.110

Stephanie Bogan: Later, he said why.

146

00:33:08.730 --> 00:33:10.320

Stephanie Bogan: I said, because you haven't made the decision.

147

00:33:12.900 --> 00:33:19.140

Stephanie Bogan: If you'd made the decision we wouldn't be having the conversation about how you really need to



like we'd be having a conversation, but what we're going to do about it.

148

00:33:20.340 --> 00:33:24.270

Stephanie Bogan: When every time you decide something I mean like you decided what happens.

149

00:33:28.650 --> 00:33:31.800

Clinton Miller: um I would have to say it depends, but.

150

00:33:33.090 --> 00:33:39.450

Clinton Miller: I see the difference you're making are the distinction you're making and you're just doing it.

151

00:33:40.230 --> 00:33:43.470

Stephanie Bogan: Together there's that and that's exactly you see it in here and clint.

152

00:33:43.740 --> 00:33:46.590

Stephanie Bogan: there's that like I decide to do stuff.

153

00:33:47.880 --> 00:33:49.170

Stephanie Bogan: And then there's the.

154

00:33:50.370 --> 00:33:51.720

Stephanie Bogan: I committed to do stuff.

155

00:33:53.310 --> 00:34:01.110

Stephanie Bogan: Right and and you all have had a moment where you've committed to do something where you were all in burn the ships pull the band aid it didn't matter.

156

00:34:01.440 --> 00:34:10.380

Stephanie Bogan: Because you had so much why conviction around it, that that state didn't require you to worry about the House and the what ifs and all the shit that we deal with on a daily basis.

157

00:34:11.730 --> 00:34:24.210

Stephanie Bogan: So understand that half our problem is just not being clear and what we're doing and why and how we're spending our time and why, like those are big and their strategic and I talked about them a lot, but I talked about them a lot, because they are game changers.

158

00:34:25.290 --> 00:34:26.370

Stephanie Bogan: All right, we clear on that.

159

00:34:27.450 --> 00:34:41.250



Stephanie Bogan: So let's just pause there because I want to talk about how this shows up in our people in our project management and how we choose our priorities and I want to make this engaging, but I just want to pause and I want to hear how that surfaces for you.

160

00:34:42.300 --> 00:34:48.690

Stephanie Bogan: Is there a brave soul out there who will share as they think about this josh i'm going to call on you, because you get in the yeti man, so you got word.

161

00:34:48.690 --> 00:34:49.020

Stephanie Bogan: For it.

162

00:34:50.160 --> 00:34:56.580

Stephanie Bogan: As you think about that I know you're you know you're you're not a bad place but like How does that sit with you in terms of.

163

00:34:58.170 --> 00:35:00.720

Stephanie Bogan: You know where are you in the realm of getting shit done.

164

00:35:03.330 --> 00:35:12.000

Josh Ackerman: better than I was a month ago i'm made some decisions that helped me.

165

00:35:13.560 --> 00:35:15.630

Josh Ackerman: See the next step and.

166

00:35:17.610 --> 00:35:27.330

Josh Ackerman: Take the right thing you know, take the right action to get it to work so better than I was not perfect, yet, but better than I was.

167

00:35:28.710 --> 00:35:28.980

Stephanie Bogan: So.

168

00:35:29.820 --> 00:35:32.760

Stephanie Bogan: What was the difference there right because we have this I know.

169

00:35:33.240 --> 00:35:37.800

Stephanie Bogan: I when I talked with you all this happens, a lot we have sort of what i'll call that effort it action.

170

00:35:38.100 --> 00:35:47.460

Stephanie Bogan: And this momentum and energy builds up behind not getting what you want it's frustrating right and then something happens, you have conversation your mastermind the insight happens in a call, we have a conversation.



171

00:35:47.850 --> 00:35:55.830

Stephanie Bogan: And then the dam breaks and you get to that other side, what like what would you attribute that clarity to like what was the shift for you.

172

00:35:57.750 --> 00:36:14.460

Josh Ackerman: I think the shift was a referral, and I did a decent job of explaining what I do and how I do it not perfect, but decent yep and quoted the full fee.

173

00:36:15.720 --> 00:36:21.180

Josh Ackerman: With no option to negotiate the fee down.

174

00:36:21.630 --> 00:36:37.230

Josh Ackerman: yep and the guy disappeared for two weeks, so I sent him, one of the emails off this the three strike process, and he responded and said we're not done lots of covert in my house.

175

00:36:38.040 --> 00:36:38.280

Oh.

176

00:36:39.840 --> 00:36:59.130

Josh Ackerman: So I didn't chase them away, but I had made peace with the idea that the price was too high, it wasn't a good fit i'm kind of all of the things that I would have objectively say I want to do with my pitch with my value proposition.

177

00:37:01.050 --> 00:37:03.750

Josh Ackerman: And instead of being.

178

00:37:04.800 --> 00:37:06.300

Josh Ackerman: No, thank you he's a.

179

00:37:09.420 --> 00:37:12.930

Josh Ackerman: he's still a maybe yeah so that's pretty cool.

180

00:37:13.260 --> 00:37:16.200

Stephanie Bogan: Well, and what's also cool about that is that you're Okay, no matter what.

181

00:37:17.580 --> 00:37:29.520

Stephanie Bogan: yeah right and I get it you guys, I know you think I don't get it, that my life is so perfect so much money they never strictly truly i'm human like everybody else I would love great there's more and better calls to everyone, no matter where you are.



182

00:37:30.090 --> 00:37:39.720

Stephanie Bogan: Which is when you get to the place and i'm not here all the time, but trust me the more time you spend here the easier and better it gets where you can be happy, regardless of that outcome.

183

00:37:40.410 --> 00:37:49.560

Stephanie Bogan: that's your centered confidence now if again i'm going to make that little exception for rent and ramen like if you have three babies and you like literally I get great.

184

00:37:50.070 --> 00:37:58.020

Stephanie Bogan: And I also get that the only other exception is our mindset, because once you've passed right and Rom and the only reason for us to think feel and behave that way is because.

185

00:37:58.470 --> 00:38:07.230

Stephanie Bogan: It still feels that way, even though we're not really there when we do the check in right like the bad thing is really likely to happen it just feels like it.

186

00:38:07.770 --> 00:38:17.250

Stephanie Bogan: Now, why is this relevant one josh like that's super awesome because it's about how do we get past the things that are holding us back, how do we do that.

187

00:38:17.820 --> 00:38:25.560

Stephanie Bogan: So josh was talking about telling His story out in the world and kind of breaking through that resistance point when we talk about getting shit done in the business.

188

00:38:25.920 --> 00:38:33.870

Stephanie Bogan: it's about telling the story internally and then holding people to the story, so if you're completely on your own which a handful of you are.

189

00:38:34.380 --> 00:38:52.140

Stephanie Bogan: All that conversation about clarity vision focus essential ISM habit, like all of that, like it's all you and your unit of time until you can get to the place either mindset or actual money right whether the hang up is in your head or in your wallet right we're both to that place.

190

00:38:53.340 --> 00:39:03.300

Stephanie Bogan: Right so there's a reality, I get that when you're first starting out, but the second that you get to rent and ramen what I want you to understand is everything at that point is how efficiently you run the course.

191

00:39:03.570 --> 00:39:16.050

Stephanie Bogan: Nobody runs a perfect not Tony robbins not me not Richard Branson not oprah not RON Carson nobody right it's but it's about how much tacking we do along the way, how much energy and experience we lose.

192

00:39:17.580 --> 00:39:30.090



Stephanie Bogan: I did that how much energy experience in economics, we lose to our ineffective methods so we talked about people projects and priorities it's about the story that we tell ourselves and the story that we tell internally.

193

00:39:30.540 --> 00:39:40.320

Stephanie Bogan: How do we actually get stuff done so here's the models that we've talked through can you guys still see my screen, I think you can right move you over a little bit.

194

00:39:40.710 --> 00:39:50.160

Stephanie Bogan: Right so we've talked about people, but I know i've had a number of conversations with you all in the last 30 days about what I call the people reset i'm look.

195

00:39:51.780 --> 00:39:54.660

Stephanie Bogan: i'm going to go forward one side I got all this stuff keep track of time.

196

00:39:56.580 --> 00:40:05.970

Stephanie Bogan: Alright, so let's talk about the people reset which is not just you, but everyone on your team needs to be in a place where they are clear they're focused and they're working on the right things at the right time.

197

00:40:07.140 --> 00:40:20.910

Stephanie Bogan: So one it can't be more than reasonable people can do right so that's the overwhelm and the priorities and right getting clear on the essential things that are going to move the Needle, so I want you to understand, are you clear, this is actually a big deal.

198

00:40:21.930 --> 00:40:34.140

Stephanie Bogan: If you can't say to me right now, if I sent you a survey that said, what are the big three things that you're moving the Needle, on that have all of your extra not run the shop attention, could you send me that email could your team send me that email.

199

00:40:35.310 --> 00:40:43.380

Stephanie Bogan: If you and they can't you're not clear and you're going to lose energy experience and economics to that inefficiency.

200

00:40:44.190 --> 00:40:51.330

Stephanie Bogan: you're not gonna be able to discern meet you nice to be able to to find any will put a checkbox on it or show up on your p&l but you're going to feel it it's not going to feel good.

201

00:40:52.440 --> 00:41:00.600

Stephanie Bogan: When we're clear when we are clear you guys have read the books you've listened to me it just feels so damn uncomfortable in the moment of making the choice.

202

00:41:00.960 --> 00:41:05.370

Stephanie Bogan: Because we got to do this when we got to do this and half the time we don't do other things well



we just don't.

203

00:41:06.060 --> 00:41:17.940

Stephanie Bogan: So it's about arguing with reality in line to ourselves just stop doing that right like we don't live in the land of magical fairy dust we live in the land of finite amount of hours a finite amount of energy.

204

00:41:18.630 --> 00:41:34.350

Stephanie Bogan: that's it hours time, energy and then how we focus our attention determines the outcome with the mindset right that we apply to it if you're not clear you're going to spend a lot of time reacting your team will spend time reacting.

205

00:41:36.210 --> 00:41:47.760

Stephanie Bogan: And that's a big deal clarity, by the way, are things like who do we work with what's our onboarding process what's our say yes process when it comes to teams and most of you have at least a part time person or more, some of you have many.

206

00:41:48.540 --> 00:41:51.780

Stephanie Bogan: Those models that we talked about that's clarity.

207

00:41:52.200 --> 00:42:04.290

Stephanie Bogan: Service models are clarity, Brian gel Trent hey everybody, this is how we do things this is when we do them this is who we don't do them for which means, this is, who we don't do them for here's what we don't do here's what's in and what's out.

208

00:42:04.590 --> 00:42:21.090

Stephanie Bogan: In here's the timeline that we put to that so if you're having problems with efficiency clarity time right being overwhelmed you need to look at those business habits that we talked about we've all been talking about, but it starts with getting clear on where Am I really.

209

00:42:22.710 --> 00:42:27.540

Stephanie Bogan: What are my resistance points, if I told you all right now, you had 12 months to double it.

210

00:42:29.610 --> 00:42:38.820

Stephanie Bogan: yeah goal exactly right that's panic can maybe 24 will be generous 36 maybe right still intense right, how are you going to do that Mike.

211

00:42:44.820 --> 00:42:52.230

Stephanie Bogan: yeah you get a really figure some stuff out quick isn't it there's no room for there no margin for error here, ladies and gentlemen, you got 12.

212

00:42:52.590 --> 00:43:00.480

Stephanie Bogan: And i'm not imposing that timeline, but if we had this sense of urgency truly are that \$250,000 on the table that I always talk about right.



213

00:43:00.810 --> 00:43:06.900

Stephanie Bogan: We would, if I said to you hey if you get clear, this is what will happen, and I could define it the way that your brain can define the problems of.

214

00:43:07.320 --> 00:43:09.840

Stephanie Bogan: Staying the way that it is, then, things would change.

215

00:43:10.740 --> 00:43:13.080

Stephanie Bogan: That we have to get focused on the right priorities.

216

00:43:13.170 --> 00:43:21.930

Stephanie Bogan: So this is where it goes to that launch process and in our next call we're going to go through the quarterly Business Review and we're going to start taking you guys through it next year we're going to take you through it every time.

217

00:43:22.290 --> 00:43:26.460

Stephanie Bogan: Great learning from this year one of you those mastermind calls are pretty cool one of you said hey.

218

00:43:27.600 --> 00:43:34.020

Stephanie Bogan: it'd be really helpful if you could remind us to do the quarterly business reviews and I was like that's a really good idea how about we do that.

219

00:43:34.620 --> 00:43:43.170

Stephanie Bogan: So we're going to start taking you through that process to help you go through it, whether you're right on your own or whether you're managing a much bigger team, how are you going to go through that process.

220

00:43:43.680 --> 00:43:51.090

Stephanie Bogan: So, but I want you to assume that there is a model, this is very similar to traction, by the way, are like I really should have written that I could have written a couple books.

221

00:43:51.450 --> 00:44:00.630

Stephanie Bogan: Our model is very similar to that I just have slightly different tweaks in terms of like size of firms, and you know how you how you are actually going to get things done within your teams.

222

00:44:01.110 --> 00:44:11.160

Stephanie Bogan: But we've gone through this in the lesson plans, but this is a process that I want you to understand is the found day it's the railroad track on which or train runs Brian if I asked you to run.

223

00:44:11.400 --> 00:44:21.420



Stephanie Bogan: Your railroad from New York to California, with no track right it's on the cow trail what's your what's your efficacy with your efficiency and experience and what are your economics, going to be.

224

00:44:23.190 --> 00:44:28.860

Stephanie Bogan: Less less right bless and if we lay a track first Brian how's it gonna be.

225

00:44:34.860 --> 00:44:39.210

Brian Fricke: it's gonna be a heck of a lot easier, simple and yeah faster.

226

00:44:39.570 --> 00:44:50.340

Stephanie Bogan: And that's inspired action versus effort action when you have the clarity, then you have the transparency, which is in the accountability, which is what we're talking about here that's the track everything runs on.

227

00:44:51.990 --> 00:44:59.310

Stephanie Bogan: It but, again, the reason i'm talking to you about your own personal agency is, if you if you can't get that, then you can't get your.

228

00:44:59.850 --> 00:45:04.230

Stephanie Bogan: Whether it's you and a part time person, are you a team of 12 you can't get them there you can get there from here.

229

00:45:04.860 --> 00:45:10.770

Stephanie Bogan: So managing people projects and priorities is really just about getting shit done getting shit done is about having the track.

230

00:45:11.220 --> 00:45:19.080

Stephanie Bogan: And that is the great entrepreneurial debate right email was written about it track it's all about taking our entrepreneurial personalities.

231

00:45:19.620 --> 00:45:34.860

Stephanie Bogan: And ordering and organizing that into a way to get things done consistently or taking our very consistent personalities and expanding them to become more growth oriented like those are the two lanes that you are operating from most of you vast majority of you.

232

00:45:36.210 --> 00:45:40.200

Stephanie Bogan: And this process is the track that anybody can run on to get clear.

233

00:45:41.520 --> 00:45:45.960

Stephanie Bogan: To get transparent and then ultimately to get the results that we want with our people in teams.

234

00:45:46.890 --> 00:45:54.420



Stephanie Bogan: So annual strategic planning meeting which we will go through towards the end of the year or quarterly Business Review, which we will be talking about.

235

00:45:54.690 --> 00:46:04.860

Stephanie Bogan: we've talked in the last few meetings about managing our people, not in terms of HR reviews and performance in general COMP and in terms of the day to day so that's what I want us to kind of break down.

236

00:46:05.400 --> 00:46:13.110

Stephanie Bogan: and talk about now we've got the quarterly Business Review and then i'm going to i'm going to shut this off because I just wanted to get through those as a level set because.

237

00:46:13.950 --> 00:46:23.760

Stephanie Bogan: Getting done isn't about any one thing it's about 29 things and it's about how you sit at the Center of them as the anchor.

238

00:46:24.750 --> 00:46:31.170

Stephanie Bogan: One with agency over your vision, what the heck Am I here doing with my time and why.

239

00:46:31.890 --> 00:46:43.980

Stephanie Bogan: over your resources, starting with time, because you true greatest revenue producing asset if you're not using that it does not matter how good you are at the other stuff and then second your leverage people process and platform.

240

00:46:45.120 --> 00:46:53.520

Stephanie Bogan: And then, third, what is the outcome that you are creating with it, so what I want to do now is I want you to think about the resistance points that you're facing practically.

241

00:46:54.990 --> 00:47:03.570

Stephanie Bogan: I have a part time assistant she does get things done on time i've got 18 people I can't get Bob to do whatever I had to fall with one of you last week, who was like hey.

242

00:47:03.990 --> 00:47:09.570

Stephanie Bogan: I had the the island speech, if you aren't familiar with the island speech, let me know the up and out conversation.

243

00:47:10.050 --> 00:47:15.270

Stephanie Bogan: And you know here's where we are now, I think that was you Liz in terms of where do we go from here.

244

00:47:15.780 --> 00:47:33.570

Stephanie Bogan: But understand that if you weren't clear on what needs to get done and clear is not nodding and wishing and talking clear is a clear set of common language, whether it's a sauna or a spreadsheet or a whiteboard that you write it on what are the things that you're trying to accomplish.



245

00:47:34.890 --> 00:47:49.440

Stephanie Bogan: Beyond running the shop like I don't care how you do it don't give a damn posted you stick on everybody's computer, you have to have that clarity other side of that and we talked a little bit about this, but I think this is a good space, but how do you handle breakdowns.

246

00:47:51.030 --> 00:48:01.980

Stephanie Bogan: How do you handle victims because, by the way, isn't that what frustrates us all the time, if only this person would do this if the process had done that, if we had chosen the right blah blah blah we wouldn't be in this mess, the first place right.

247

00:48:02.820 --> 00:48:10.080

Stephanie Bogan: So how do we handle the breakdown so we've talked a lot about clarity so i'm not going to drill on that anymore, and if you guys have questions around that definitely ask.

248

00:48:10.350 --> 00:48:24.120

Stephanie Bogan: What I do want to talk about is the breakdowns that you're experiencing and the different ways that we can handle them so i'm going to pause there and ask you guys, I think our allison do we have anything in slide Oh, at this point, or I can just use chat.

249

00:48:24.540 --> 00:48:25.890

Limitless Adviser: We do not have anything.

250

00:48:26.880 --> 00:48:33.900

Stephanie Bogan: Alright, so I want you to drop in chat when it comes to getting shit done managing yourself rate just.

251

00:48:34.230 --> 00:48:39.330

Stephanie Bogan: i've got that i'm trying, you know I just can't quite get myself in gear don't know why right.

252

00:48:40.500 --> 00:48:49.980

Stephanie Bogan: Managing people processes platforms right the operational like are people like do they know what to do, is it a people problem like what are your key resistance points.

253

00:48:50.670 --> 00:49:00.450

Stephanie Bogan: So drop some things in chat just so we can start to feel and i'm going to ask a couple of you to share and then we'll talk through them, because this is really about, like the stuff that's in between.

254

00:49:00.810 --> 00:49:08.640

Stephanie Bogan: All the stuff that determines how we show up for ourselves and our team to move things down the field and get the results that we want.

255



00:49:10.680 --> 00:49:15.180

Stephanie Bogan: All right, i'll do it tomorrow, I love that Jill did you guys ever heard of tomorrow land.

256

00:49:16.320 --> 00:49:20.370

Stephanie Bogan: Tomorrow land is that place where 99% of human potential lies.

257

00:49:23.010 --> 00:49:30.000

Stephanie Bogan: yeah like how many of us don't have a whole bunch of awesome in tomorrow, land and if we could just get through this stuff on our today play we'd be right there right.

258

00:49:31.140 --> 00:49:38.400

Stephanie Bogan: Joe personal distractions josh telling my story on the world done that that whoops okay done i'm comfortable right.

259

00:49:39.660 --> 00:49:50.340

Stephanie Bogan: I feel you there so, by the way it doesn't mean you have to go do some big huge thing it's about really creating the space for yourself, for your want be honest with yourself about where that's working and where it's not.

260

00:49:50.970 --> 00:50:00.600

Stephanie Bogan: So this is really when we talk about managing people projects and priorities you all have gone through the lessons you've heard me talk about it right, you know, generally, what to do what we really want to talk today about is.

261

00:50:01.050 --> 00:50:06.810

Stephanie Bogan: One of the breakdowns why isn't that happening in the way that you want and what can you do about it.

262

00:50:07.830 --> 00:50:25.560

Stephanie Bogan: aaron's not falling time blocks rate too much stuff not letting go so let's pause there and let's talk through a little bit of how do we get stuff done so anybody leaving projects have completed Melissa that's a really good one hey Melissa, why do you even have completed.

263

00:50:28.680 --> 00:50:32.670

Melissa Joy: I don't know it's personal thing i'm not like that J person that's like the checklist.

264

00:50:33.690 --> 00:50:35.010

Melissa Joy: Type person and.

265

00:50:36.360 --> 00:50:41.670

Melissa Joy: I get to a point where it's like oh there's a crossroads and I just don't get to the finish line.



266

00:50:43.020 --> 00:50:43.530

Stephanie Bogan: So i'd say.

267

00:50:43.770 --> 00:50:46.470

Melissa Joy: 80% completed, not at all right.

268

00:50:46.560 --> 00:50:55.170

Stephanie Bogan: So right I call that blue tape syndrome anybody ever remodel or build a house where you run around and you put blue tape on the final pieces.

269

00:50:56.700 --> 00:51:09.390

Stephanie Bogan: guys don't take this personally, I call my husband blue tape guy right we get to 90% and then that extra tempers like that last year percent never gets done like by why we literally like sold our dream house in California like to move to Costa Rica.

270

00:51:10.140 --> 00:51:18.540

Stephanie Bogan: And I swear to you, there were still pieces of blue tape in my bathroom or pieces of blue tape like blue painters tape where things were just not quite right.

271

00:51:19.920 --> 00:51:28.380

Stephanie Bogan: Right, so what, why do we not get all the way to the finish line, Melissa like why don't you get to the finish line like literally like on a day to day practical basis what shows up.

272

00:51:30.870 --> 00:51:34.500

Melissa Joy: there's a news well there's a new either problem or shiny object that.

273

00:51:36.210 --> 00:51:42.330

Melissa Joy: I can't prioritize get this off the list because it's quick get it done and then you'll deal with the more complex oh.

274

00:51:42.540 --> 00:51:45.630

Stephanie Bogan: Alright, so do you guys how many stories, I found like four stories and.

275

00:51:45.630 --> 00:51:45.990

Learning.

276

00:51:48.510 --> 00:51:57.480

Stephanie Bogan: You get good at sephora well, so what i'm just going to start with, did you hear the can't so like things like can't shouldn't suppose to like if you just use this words anytime just call bullshit.

277



00:51:58.800 --> 00:51:59.010

Melissa Joy: Just.

278

00:51:59.040 --> 00:52:02.790

Stephanie Bogan: Call it because it just nothing else that your check to be like hey what's really going on here.

279

00:52:03.900 --> 00:52:14.340

Stephanie Bogan: Right, so when we start something we don't finish it either there's a resistance to finishing it or there's a real distraction so here's the really good news all distractions are just pain.

280

00:52:16.800 --> 00:52:20.430

Stephanie Bogan: That sounds really weird right, but if you want something.

281

00:52:21.180 --> 00:52:21.780

Melissa Joy: And then we'll.

282

00:52:22.140 --> 00:52:28.320

Stephanie Bogan: Do the things that you, you need to do when the order you need to do them to get to and you go off and these other two directions.

283

00:52:28.890 --> 00:52:36.060

Stephanie Bogan: Then it, what we are really finding in the research supports I don't if you guys have read the book and distractible it'll be part of next year's recommend.

284

00:52:37.050 --> 00:52:45.570

Stephanie Bogan: Is there's a lot of research that really shows that what we're really managing we're not managing our time we're not managing our projects we're managing our discomfort.

285

00:52:46.680 --> 00:52:49.620

Stephanie Bogan: Right, what does that last 10% mean to Melissa.

286

00:52:50.400 --> 00:53:01.740

Stephanie Bogan: Right Why are there 15 of those projects with like it could be so many things right, it could be that what's on that list means something that's scary it could mean a next level of success that her mindset and her stories and our voices aren't ready for.

287

00:53:01.980 --> 00:53:08.460

Stephanie Bogan: It could mean that she just put too much hit in the bag right you can't put 10 pounds and five pound bag and yet excellence and happiness it just doesn't work that way.

288

00:53:08.760 --> 00:53:18.810



Stephanie Bogan: So it could be that she started so many things that she's just fractionalized and she can't finish, let me, it could be that she's got an amazing vision and our team to an execution like I don't know.

289

00:53:20.040 --> 00:53:25.470

Stephanie Bogan: But what I know is that we allow it, and that's Problem number one problem number one is that we allow this stuff to happen.

290

00:53:26.760 --> 00:53:31.680

Stephanie Bogan: Because you're all smart and you're all capable and it just tells us not that you're not smart you're not capable you're not carrying a committed.

291

00:53:32.010 --> 00:53:41.280

Stephanie Bogan: that's how big are bullshit gets literally so when we talk about moving things down the field understanding that what you're really talking about are the systems.

292

00:53:41.730 --> 00:53:46.530

Stephanie Bogan: through which the track, we talked about right the mission, the vision, the weekly meetings, the asanas etc.

293

00:53:47.340 --> 00:53:55.590

Stephanie Bogan: And that behavior business habits and the behavioral habits of the people, showing up and man that's where everything gets jiggy.

294

00:53:56.100 --> 00:54:01.950

Stephanie Bogan: Your behavioral habits are driven by your thought habits, they break they'll hold Melissa back for any of those reasons, like.

295

00:54:02.250 --> 00:54:17.490

Stephanie Bogan: It doesn't even matter in this call, with the reason is, Melissa I can talk about that the example is there's a reason that 10% isn't happening and we can all agree that two of those things getting done one of them would be better than five and getting to 90%, why do we let that happen.

296

00:54:18.840 --> 00:54:26.250

Stephanie Bogan: We let that happen because she also talked about you know I get choices were not able empowered.

297

00:54:26.970 --> 00:54:34.290

Stephanie Bogan: Trained is really what it boils down to guys trained to make choices we don't have discipline minds.

298

00:54:34.650 --> 00:54:44.850

Stephanie Bogan: were in the habit of right christy was like I need to when I should and i'm supposed to and i've got to get all this done or else really bad things are going to really like all those projects did they get done every quarter Steve.



299

00:54:46.470 --> 00:54:56.370

Stephanie Bogan: They don't get all the bad things happen know the really bad things you've always work to avoid because your brain knows what they are, and it will really, really work to avoid them.

300

00:54:57.750 --> 00:55:01.170

Stephanie Bogan: Right so we're just looking at how do we reapply all that energy.

301

00:55:01.980 --> 00:55:07.470

Stephanie Bogan: When we reframe our thinking, and then we reframe our behavior habits Those are all the lessons around time and.

302

00:55:07.860 --> 00:55:18.690

Stephanie Bogan: Right agent leverage and people and getting your behavior in a place that allows you to be more successful, then we can get to the business habits holy shit that's the only time we can get to the business habits in a way that stick.

303

00:55:19.680 --> 00:55:33.660

Stephanie Bogan: that's why it's such an integrated conversation so when you think about your team, whether it's that part time virtual assistant Where are those breakdowns right so for Melissa it's that last 10% then our job is to say is this a people breakdown.

304

00:55:35.400 --> 00:55:43.680

Stephanie Bogan: Right is it my lack of clarity about the priorities is it my lack of clarity about the outcome that I want like what's the breakdown.

305

00:55:44.580 --> 00:55:49.440

Stephanie Bogan: Is it a process hey you know what I don't have a service model so they don't know what to do, consistently hey.

306

00:55:49.920 --> 00:55:59.040

Stephanie Bogan: You know I don't have an onboarding process I don't have a script for this I don't have a fee schedule I don't have a way to tell clients don't we don't do that or we build it out, really.

307

00:55:59.370 --> 00:56:11.550

Stephanie Bogan: Right that's what those models are all about, ladies and gentlemen, there the business habits, so that people don't have to think about it, and it becomes the behavioral habit to say no, we don't just get our fees why don't we do that we're awesome.

308

00:56:12.690 --> 00:56:14.220

Stephanie Bogan: And right, of course, very lovely way.

309



00:56:15.690 --> 00:56:24.150

Stephanie Bogan: So what's your resistance point personally like are you still and we're all like me included constantly working on this in terms of.

310

00:56:24.840 --> 00:56:34.110

Stephanie Bogan: How are we showing up and then you have places where your team is not showing up and then where they're not showing up this will be really crazy, how can you take complete responsibility for that.

311

00:56:37.800 --> 00:56:50.010

Stephanie Bogan: right if we hire them and if we train them and we manage them and we reward them with continued COMP and or bonuses or not being fired right what we're essentially saying is what.

312

00:56:52.920 --> 00:56:55.020

Stephanie Bogan: What you're doing is OK enough to keep it up.

313

00:56:56.310 --> 00:56:59.700

Stephanie Bogan: Right we're teaching them how to be uncomfortably comfortable.

314

00:57:00.090 --> 00:57:09.240

Stephanie Bogan: If you're not in the place where you're getting what you want from people if you are right, you can all talk about like how good it is to write have that conversation and know that when you let those things happen in the way that you want.

315

00:57:09.630 --> 00:57:19.740

Stephanie Bogan: that's the only reason you don't create more leverage, by the way, the only real one, at the end of it all in terms of people process and platform is there's that fear.

316

00:57:20.100 --> 00:57:38.460

Stephanie Bogan: That if we let go if I am not the one babysitting it then I can't be in control of it, and then I can't count on it, I can't count on it that scary and then, in an effort to appease that feeling we make all kinds of compromises and has that worked out for us.

317

00:57:40.080 --> 00:57:43.830

Stephanie Bogan: Right sometimes good sometimes bad right, you will know when and where that shows up.

318

00:57:44.820 --> 00:57:54.120

Stephanie Bogan: So when you think about managing people guys, how is that showing up for you in terms of have you made shifts that have elevated performance Liz I know you were working through.

319

00:57:54.540 --> 00:58:08.040

Stephanie Bogan: Some things with the team in terms of having the the island upper out conversation and how to kind of reset like one of the things that comes up a lot is how do we reset expectations with my team, how do I say hey.



320

00:58:08.580 --> 00:58:18.600

Stephanie Bogan: I know this is the comfortably comfortable lollipop we've all been looking off for the last little while, but now it's time to take it up a notch and we need to get to this new, better place together.

321

00:58:19.290 --> 00:58:23.790

Stephanie Bogan: So I think that's one of the things that comes up, we can talk about and you guys drop in the chat i'm.

322

00:58:25.530 --> 00:58:34.890

Stephanie Bogan: All right, i'm looking at questions, Chris has got some questions around email and would you go back to managing yourself so that's a good one to it right, so that, how do we get the comfort around leverage.

323

00:58:36.900 --> 00:58:44.490

Stephanie Bogan: How many of you are you guys have all your emojis your reactions on the bottom of your screen like I can do a little reaction like thumbs up Can you see that all right.

324

00:58:44.970 --> 00:58:52.890

Stephanie Bogan: How many of you have someone else managing your email for you drop me a thumbs up drop Christie a thumbs up if you have someone else managing email for you.

325

00:58:55.290 --> 00:58:58.920

Stephanie Bogan: i'm going to scroll through my screen here john lori.

326

00:59:00.300 --> 00:59:05.700

Stephanie Bogan: You guys i'm going to start doing this and all the call, so I can check on you easy Stanley Stan Mike.

327

00:59:07.980 --> 00:59:12.330

Stephanie Bogan: All right, okay Chad that'd be no all right.

328

00:59:14.790 --> 00:59:16.890

Stephanie Bogan: All right, Steve no okay.

329

00:59:18.270 --> 00:59:27.060

Stephanie Bogan: email is the thing that's still the most of your time true if we did time studies every single time emails steals the most of your time.

330

00:59:27.720 --> 00:59:36.150

Stephanie Bogan: And it feels most of your time because we spend a lot of time in it and it's riddled with distractions and we don't know how to organize it into think about the military right like.



331

00:59:36.360 --> 00:59:44.460

Stephanie Bogan: Supplies get dropped in the knees go here, and these go here, and these go here and then everybody knows had expertly handle the system and right distribution hapless and away, they go.

332

00:59:45.390 --> 00:59:52.590

Stephanie Bogan: Right that's we're talking about with email, but we are the only distribution channels, so we can talk a little bit more about the wise and what's behind that.

333

00:59:53.910 --> 01:00:00.300

Stephanie Bogan: In terms of you personally getting things done, who who here is doing it and who has seen a massive change that they want to share.

334

01:00:01.710 --> 01:00:04.440

Stephanie Bogan: Your story randomly calling you, but your your thumbs up so anyway.

335

01:00:08.130 --> 01:00:09.450

Christy Raines: stuff i'm happy to talk about it.

336

01:00:09.720 --> 01:00:10.560

Stephanie Bogan: All right, christy.

337

01:00:11.070 --> 01:00:17.700

Christy Raines: So my EA I hired her last December, and she just got married so she was out for two weeks.

338

01:00:19.350 --> 01:00:24.120

Christy Raines: So it was like my first time slipping back to pre December 2020.

339

01:00:25.290 --> 01:00:42.450

Christy Raines: And I was like Oh, my goodness, like not like not having somebody to manage me i'm like I could never do without this role again and what's the biggest thing that has changed.

340

01:00:43.470 --> 01:00:47.910

Christy Raines: For me is that she goat creates in Microsoft word.

341

01:00:48.660 --> 01:00:58.320

Christy Raines: This is going to get like a little granular for like 60 seconds, but she like creates in Microsoft word that she puts in our shared drive So when I come in in the morning, I do not open email.

342

01:00:58.860 --> 01:01:06.510

Christy Raines: I go in our shared drive and she has written for me an executive summary of my day and an executive



summary of my email.

343

01:01:07.500 --> 01:01:23.430

Christy Raines: Like all the links all the phone calls all the numbers all the things and then there's all and then she puts on my schedule the time to check the different email boxes that she has so there's like certain boxes that only I have to I only have to check twice a week.

344

01:01:24.570 --> 01:01:28.620

Christy Raines: And so, when I go into email, I just have my review today folder.

345

01:01:29.040 --> 01:01:30.450

Stephanie Bogan: Is not the best thing ever.

346

01:01:30.570 --> 01:01:32.850

Christy Raines: It is life change.

347

01:01:35.190 --> 01:01:37.200

Stephanie Bogan: Today, yes.

348

01:01:37.560 --> 01:01:47.580

Christy Raines: And that there's time designated to go check that folder like I she manages it's like how you say Lisa like she manages you like, she manages.

349

01:01:47.850 --> 01:01:48.960

Christy Raines: I literally and I.

350

01:01:49.440 --> 01:01:51.450

Stephanie Bogan: I show up and do what i'm told.

351

01:01:51.750 --> 01:02:03.630

Stephanie Bogan: Yes, literally and now Christie I think you and I are a little bit similar here, I like i'm all about the client the experience the value and i'm like a little bit of a perfectionist so like it's got to be.

352

01:02:04.920 --> 01:02:08.250

Stephanie Bogan: Great it's gonna be rights can be off like letting those really hard.

353

01:02:09.120 --> 01:02:10.980

Stephanie Bogan: so hard like literally pry it from your.

354

01:02:10.980 --> 01:02:21.600



Stephanie Bogan: cold dead hands, no one, I remember uttering the words Andrew no one could ever manage my calendar for like no way my human oh my God, no one would and now i'm like.

355

01:02:22.890 --> 01:02:35.040

Stephanie Bogan: Like please never ever make me go back to because i'm so clear on how utterly unproductive it is to getting shut down like we tell ourselves that going into email, is the way.

356

01:02:35.550 --> 01:02:44.160

Stephanie Bogan: And i'm just going to go with emails the not way, it is the not way your job is to just have somebody as soon as you can filter that down for you it's.

357

01:02:44.640 --> 01:02:52.440

Christy Raines: Truly, I mean it's i've used it stuff like as the gift of \$2,000 a month to myself yeah like.

358

01:02:52.950 --> 01:02:55.830

Stephanie Bogan: By the way, would you spend that \$2,000 like in.

359

01:02:55.890 --> 01:02:59.790

Stephanie Bogan: Like if you're stripping down your expenses to be at the end right.

360

01:03:01.380 --> 01:03:17.820

Stephanie Bogan: Like it's me and her always like we are a tag team, and I will not strip her off unless things get really because that once you create a space where you realize how much of a springboard, it is the idea of doing it again is utterly suffocating.

361

01:03:18.300 --> 01:03:19.950

Christy Raines: know, and as I said she was going for to.

362

01:03:20.460 --> 01:03:22.290

Stephanie Bogan: value and what's possible it becomes.

363

01:03:22.530 --> 01:03:28.410

Stephanie Bogan: constricting when you look at that you go, I have to do that it's like oh that's so not.

364

01:03:28.530 --> 01:03:38.430

Stephanie Bogan: You like it just becomes like I don't like you just have to get to that space, I try everything I can to get you guys there, but once you're there you're like I will never go back never ever go back.

365

01:03:38.850 --> 01:03:45.630

Stephanie Bogan: And that's how it is with everything surges and service models, but time is the hard one because we have so much wired into it.



366

01:03:46.500 --> 01:03:54.660

Stephanie Bogan: So managing people in terms of those resistance points so Chris you brought up a really good one, which is email is such a big resistance point.

367

01:03:55.380 --> 01:04:02.850

Stephanie Bogan: Because it's the it's what we tell ourselves and rationalizes our way to productivity, but it is every single time, the thing that will feel so much.

368

01:04:03.120 --> 01:04:09.150

Stephanie Bogan: Not just for your productivity, but your joy at the end of the day, you just don't feel productive in spite of all that activity that you spun up.

369

01:04:09.810 --> 01:04:18.750

Stephanie Bogan: So manager resistance points, whatever they may be, and then Liz do you want to talk a little bit about your reset because I know that was a big deal for you and I know a lot of people are.

370

01:04:18.960 --> 01:04:23.370

Stephanie Bogan: Having some version of that how do I go back to my team and be like we're going to do a different now.

371

01:04:27.990 --> 01:04:29.580

Stephanie Bogan: right there I know.

372

01:04:29.700 --> 01:04:31.920

Liz Hand, CFP®: Am I have a migraine so i'm a little.

373

01:04:33.570 --> 01:04:44.070

Liz Hand, CFP®: Low vibrating today but i'll share um yeah we had the going to an island conversation about two months ago, a month ago and today we took the next step because.

374

01:04:44.610 --> 01:04:48.570

Liz Hand, CFP®: Like I want to make all of these changes, but I don't know how to shift my team.

375

01:04:49.290 --> 01:04:58.500

Liz Hand, CFP®: So today we took the next step of like just mapping out what it is that the tasks that they're doing so that I can actually set goals or expectations, because I realized.

376

01:04:59.460 --> 01:05:09.540

Liz Hand, CFP®: I if I can't articulate what it is that i'm expecting from my team, and then I can't help them see where they're falling short and how to improve grits.



377

01:05:10.170 --> 01:05:18.630

Stephanie Bogan: So i'm going to spend a little time on this, because it applies whether you're kicking butt and taking names you're going to take it to the next level you're only going to do that with people.

378

01:05:19.410 --> 01:05:24.870

Stephanie Bogan: focused on priorities organized into projects, no matter who you are these rules are going to apply to you.

379

01:05:25.620 --> 01:05:32.250

Stephanie Bogan: If you're struggling to get all the horses in you know working in order and you're feeling all that heavy resistance this becomes.

380

01:05:32.490 --> 01:05:38.280

Stephanie Bogan: super important because every one of you in that space should have this conversation and it's what I call.

381

01:05:38.640 --> 01:05:47.310

Stephanie Bogan: The island conversation and it's essentially an invitation to move up or to move out without actually having to extend the literal.

382

01:05:47.550 --> 01:05:52.140

Stephanie Bogan: invitation, now the reason we had all that other conversation up to this point is you don't.

383

01:05:52.440 --> 01:06:04.470

Stephanie Bogan: And this is just the honest, hard coach truth you don't get to have that conversation until you have first held yourself accountable, otherwise, and this is not elegant and I say with love and from the other side of the fence you're full of shit and they won't believe you.

384

01:06:06.570 --> 01:06:07.590

Stephanie Bogan: asked me how I know that.

385

01:06:08.880 --> 01:06:14.220

Stephanie Bogan: One been there, done that, to ask me how many times they've gone into firms and had them say.

386

01:06:15.240 --> 01:06:20.850

Stephanie Bogan: Great that you're here really love it you're just the next shiny idea that is really going to change because nothing ever gets done around here.

387

01:06:22.080 --> 01:06:30.570

Stephanie Bogan: Anybody right so even you have a super positive, you have a supervisor and positive culture, it



means that you're doing these things in some form or fashion.

388

01:06:30.930 --> 01:06:41.130

Stephanie Bogan: And it's about how you institutionalize them, so the upper out conversation says that there's room for improvement in cross the board so step one is you got to own it hey.

389

01:06:41.700 --> 01:06:48.600

Stephanie Bogan: you're going to explain the impetus for change here's where the business is here's what's happening during the coaching Program.

390

01:06:48.960 --> 01:06:55.050

Stephanie Bogan: You know i'm you know kids are older, really, whatever your story is doesn't matter it's your story right that's your anchor.

391

01:06:55.710 --> 01:07:03.840

Stephanie Bogan: And then it's we were going to the more and better the calls that's why you will join this program right, you know what your Why is you can figure out how to articulate it.

392

01:07:04.110 --> 01:07:09.750

Stephanie Bogan: But it is hey as a team, whether it's you in that 10 hour a week person, are you in 19 people.

393

01:07:10.080 --> 01:07:19.530

Stephanie Bogan: It is, as we look at the landscape right there's so much change going on it's about how firms like ours evolve and adapt and find our space in that landscape.

394

01:07:19.950 --> 01:07:29.250

Stephanie Bogan: And i'm realizing right that there is opportunity for us to write do more and better figure, if you guys will all frame that conversation in the context of your firm and your story.

395

01:07:30.180 --> 01:07:35.310

Stephanie Bogan: And then it is, and in the midst of this change there's so much opportunity.

396

01:07:35.730 --> 01:07:42.480

Stephanie Bogan: we're going to call that our island right think we're going to an island we're going to go to this place where we can deliver massive value to clients run an excellent business.

397

01:07:42.780 --> 01:07:52.680

Stephanie Bogan: Have a happy high performing team that makes a great income as a flexible work schedule great lifestyle right everybody wins all the five free dollars should be talking about right like go us.

398

01:07:53.250 --> 01:07:58.380



Stephanie Bogan: In order to make that happen in the world that we're entering we're going to need to make some changes.

399

01:08:00.930 --> 01:08:11.940

Stephanie Bogan: For those of you in succession transition right hey we're starting a new chapter, the firm, we want to respect the legacy, but it's also time to figure out how we're going to lean into the future is a new team right had you create the firm 2.0.

400

01:08:12.270 --> 01:08:16.170

Stephanie Bogan: For those of you that are stuck or stalled are struggling it's your 2.0 conversation hey.

401

01:08:16.890 --> 01:08:24.450

Stephanie Bogan: may be stuck or stalled are struggling for just too long and I finally got my shit together and I got a strategy around and here's what we're going to do to step it up in her she's getting on an island.

402

01:08:25.830 --> 01:08:32.130

Stephanie Bogan: Right so, however, you get there you're going to an island, can we agree on that go into an island okay island is the more and better place.

403

01:08:32.640 --> 01:08:40.920

Stephanie Bogan: In your books, now the story that you have to tell is in order to go to the island we're all going to need to get there together we're going to get on a different kind of ship going to be a change.

404

01:08:41.310 --> 01:08:49.800

Stephanie Bogan: there's we're going to meet at the dock at five o'clock and we're going to lay out the plan we're going to get on the ship Robin have jobs on the ship they're going to be some sunny amazing days it's going to be awesome.

405

01:08:50.040 --> 01:08:59.280

Stephanie Bogan: they're getting some hard crappy days we're going to vomit all over the side but, at the end of the day, we're going to an island, and we are going to persevere when we get to that island is going to be freaking awesome.

406

01:09:00.810 --> 01:09:05.940

Stephanie Bogan: Right that's your job you got to know awesome you can't sell awesome if you're not clear on awesome, by the way, I got to know it.

407

01:09:07.110 --> 01:09:14.730

Stephanie Bogan: Right and it's going to require change, which means, I have to step up as the LEADER I need to do a better job of creating clarity and transparency.

408

01:09:14.970 --> 01:09:23.940

Stephanie Bogan: and giving you the time like fill in your mistake blanks go ahead they'll respect you for it abject



honesty right and then as a team here's what we're going to need to do.

409

01:09:25.140 --> 01:09:33.480

Stephanie Bogan: And this is going to be a little bit different right whether their one on ones are big team meeting is obviously going to be contextual to your firm if there's one issue you don't need to drag million people in.

410

01:09:33.930 --> 01:09:41.790

Stephanie Bogan: You can still have a great rah rah about where we're going, and the next strategic plan and then 2022 is coming and weave that in so that that person hears it.

411

01:09:42.930 --> 01:09:54.450

Stephanie Bogan: write changes afoot it's all about how we respond to changes is so low or right a partnership, the two people like no matter who you are in this program you are being affected by this change massively.

412

01:09:55.500 --> 01:10:05.520

Stephanie Bogan: And then it's Okay, in order to get to the island here's what we're going to need to do we're going to need to get greater clarity we're going to need to have right systems in place and models to make sure it works, the way that we want every single time.

413

01:10:05.910 --> 01:10:09.390

Stephanie Bogan: we're going to have to have good business habits right we're going to have to solve for these things.

414

01:10:09.750 --> 01:10:21.030

Stephanie Bogan: And we're not going to be able to do it all at once it's going to be messy process that's what rights that's what what big voyages are but we're all in this together that we agree that we're going to have a common language everybody's going to know how the ship works.

415

01:10:21.450 --> 01:10:26.220

Stephanie Bogan: And we're going to write we're going to really start to write navigate in the direction that we want to go.

416

01:10:27.300 --> 01:10:31.380

Stephanie Bogan: And then you lay out the structure so that's your reset.

417

01:10:32.070 --> 01:10:37.620

Stephanie Bogan: Then you have to reinforce that, with all the like we talked about a sauna or the spreadsheet and your weekly meetings.

418

01:10:37.950 --> 01:10:48.210

Stephanie Bogan: A little bit different but no different than the email policy take what we do and what i've taught a bazillion firms to do and apply it in your way right, I have an email policy chrissy took that she ripped off and deployed.



419

01:10:49.170 --> 01:10:55.350

Stephanie Bogan: Right I use a sauna and my email I don't have a daily memo doesn't matter christy and her system have that worked out.

420

01:10:56.310 --> 01:11:01.890

Stephanie Bogan: So, once you know what the resistance points are then you have to create that track, we talked about.

421

01:11:02.460 --> 01:11:10.530

Stephanie Bogan: Now my favorite track is our lunch process it's a really simple process it's kind of hard to mess it up, if you follow because you get everybody together.

422

01:11:11.100 --> 01:11:20.100

Stephanie Bogan: 2022 is coming up we're going to talk about this like quarterly Business Review it's time to do our Q4 planning go team, where we going together involvement equals investment.

423

01:11:20.580 --> 01:11:25.320

Stephanie Bogan: If people aren't involved and invested, it will become obvious and that helps with the island conversation.

424

01:11:26.220 --> 01:11:37.740

Stephanie Bogan: right when you go through that process you're identifying where the landscape is where you need to be what resistance points are, how you can get there, better together what everyone agrees to for the next year.

425

01:11:39.030 --> 01:11:49.080

Stephanie Bogan: Right so it's an easy right you're just timing, you can do it at any time, but as you hit Q4 it's really like you don't even have to acknowledge is a problem to do it just create the new and better way and started hearing to it.

426

01:11:50.190 --> 01:11:59.910

Stephanie Bogan: And then the really important point is the accountability, because if we don't follow through we on us and we on them that's where things start to break down.

427

01:12:00.270 --> 01:12:11.010

Stephanie Bogan: So the best way that I know and there's a lot that goes into about my favorite way that's really simple and we actually started doing it this year in a very like obvious ways when I called the breakdown brief.

428

01:12:11.460 --> 01:12:18.630

Stephanie Bogan: Liz I think you guys have is for you guys, is that you are somebody has the pain point pad which I thought was really somebody who's got the pain point pad.

429



01:12:19.530 --> 01:12:29.940

Stephanie Bogan: Somebody is painful so breakdown briefs are so when you set the vision of how you want things to work here's what's going to happen, we have two realms that we operate in team, we have run the shop.

430

01:12:30.390 --> 01:12:35.640

Stephanie Bogan: stuff that we do all day, every day, just to keep the doors open and make the same amount of money if nothing were to change.

431

01:12:36.030 --> 01:12:43.740

Stephanie Bogan: And then we have i'm going to call it special as you call it whatever you want, we got specialists that other stuff that we do on top of it to get to the boring better that causes all right.

432

01:12:44.730 --> 01:12:52.170

Stephanie Bogan: So one, we cannot do more in runs we can't like us run the shop for everything or people are only humans, we got to be really realistic about that.

433

01:12:52.980 --> 01:13:02.130

Stephanie Bogan: that's what the prioritization process is for, but once you've set those priorities that's why that process is important because, then you can only attract to.

434

01:13:02.610 --> 01:13:15.540

Stephanie Bogan: Like as we do as a team monthly weekly daily here's what we talked this morning, what are you working on here the priorities on the here the top six for this week right, we have a GM we literally have a meeting every Monday, called the gst huddle.

435

01:13:17.220 --> 01:13:22.110

Stephanie Bogan: it's our kitchen don't huddle we have a monthly meeting, where we talk about the Bigs and the higher level stuff.

436

01:13:23.010 --> 01:13:35.160

Stephanie Bogan: Right, are we on track with the specials but Monday to Monday it's about pst are we executing and the way that we need to write for this call to work and have the conversation to the follow up and and all the stuff there's a lot of stuff that makes this happen.

437

01:13:36.330 --> 01:13:42.390

Stephanie Bogan: And that's what that meeting is for right and there's a right we showed you guys some of the asana boards like just the details of how you break that down.

438

01:13:42.780 --> 01:13:52.620

Stephanie Bogan: that's sometimes the problem is the track, because you have to have a track in order to create a common language, the transparency piece otherwise there's lots of guesswork you lose a lot of efficiency, just doesn't work.

439



01:13:52.920 --> 01:14:02.850

Stephanie Bogan: Trust me on this, whether it's a spreadsheet posted a word Doc right a sauna find a common language transparency piece, the third piece is accountability.

440

01:14:04.740 --> 01:14:12.330

Stephanie Bogan: which is what we are almost always talking about when I have coaching conversations with you, or the breakdowns no one calls and says hey everything's working great.

441

01:14:13.050 --> 01:14:19.200

Stephanie Bogan: So the biggest issue beyond the track is how you address the breakdowns that's called accountability in our model.

442

01:14:20.190 --> 01:14:28.140

Stephanie Bogan: So right so Liz is peace and she and I talked about this this once you've had the island conversation we're going to the island it's your better but here's what I need everybody to know.

443

01:14:29.010 --> 01:14:38.400

Stephanie Bogan: We are going to the island these changes are coming they're important for us to deliver continued value to our clients, which is right, the key responsibility, I have as a firm.

444

01:14:38.670 --> 01:14:47.910

Stephanie Bogan: To make sure that we're adding value to all of the stakeholders great me as an owner you as a team our clients right our families like it's got a work.

445

01:14:49.200 --> 01:14:57.150

Stephanie Bogan: Right and so that we can really make sure that we have sustainable success in the future, good for clients, good for us right you're laying the good reasons that no one can argue it.

446

01:14:57.780 --> 01:15:10.890

Stephanie Bogan: And then, what you want to say is and here's how we're going to manage these priorities right, so what we do you guys have different versions there lots of examples in the lessons we have i'm a big fan of checklist so everybody's got a job description, but we have checklist.

447

01:15:11.940 --> 01:15:17.850

Stephanie Bogan: And this is, as we kind of tool up for scale we're going pack through all of this, as my team, how much they love like it just work right.

448

01:15:18.720 --> 01:15:27.390

Stephanie Bogan: What are the things that each person on your team does daily weekly, monthly, quarterly semi annually annually any other cycle if there's a longer cycle.

449

01:15:27.990 --> 01:15:35.400

Stephanie Bogan: right if it's hey you are going to check my email every day you're going to put it in a word, Doc



you're going to check my calendar you're going to do these things you're going to draft these plans you're going to.

450

01:15:35.820 --> 01:15:45.060

Stephanie Bogan: write run this report you're going to check the schedule every single week to make sure nothing's like that's how you make sure that everybody knows what the behavior in the business habits are.

451

01:15:45.750 --> 01:15:47.610

Stephanie Bogan: but very often we don't do that.

452

01:15:48.150 --> 01:16:00.180

Stephanie Bogan: And then the second piece is what happens when they break down so Liz goes to everybody says, right here we're going to the island you don't actually have to say, an island right like we're you know the next generation of the firm, you know, whatever is ready to tell.

453

01:16:00.600 --> 01:16:10.860

Stephanie Bogan: here's where I suspect it's going to start with me here's what my commitment is we're going to meet every month week day you know, whatever it is that your commitment don't say it if you don't mean it.

454

01:16:11.340 --> 01:16:12.840

Stephanie Bogan: here's what we need from you.

455

01:16:13.830 --> 01:16:23.310

Stephanie Bogan: At a role level if you haven't already done this we're going to need to define right to make sure everybody's clear about their run the shop, so that we can better manage the special projects that are going to move us forward.

456

01:16:23.790 --> 01:16:33.390

Stephanie Bogan: And we just got to get a handle on that right so over the next 90 days we're just going to take our job descriptions and turn them into daily weekly, monthly checklist so we're all really clear now.

457

01:16:33.780 --> 01:16:38.670

Stephanie Bogan: Now you have clarity about how to hold the transparency that's going to sound really weird.

458

01:16:39.300 --> 01:16:47.220

Stephanie Bogan: You have accountability around the House so it's not just hey give me this outcome it's here's how I want you to get me the outcome, so I can manage to a specific standard.

459

01:16:47.670 --> 01:16:57.930

Stephanie Bogan: hey that's not how I want the email that's not how I want the agenda is to be because, as you start to build those systems, the breakdowns will show up so Liz will have this conversation with your team.

460



01:16:58.230 --> 01:17:06.630

Stephanie Bogan: Everybody will build there and then somebody because people are human and if they're not going to change they're not going to change will do their lack of follow through like they've always got.

461

01:17:07.200 --> 01:17:18.300

Stephanie Bogan: Liz job in that is to address the breakdown is immediately as possible and six months or one year review is useless right in that moment or day or within a day or two.

462

01:17:18.720 --> 01:17:33.090

Stephanie Bogan: Liz wants to go Liz you want to have that conversation that says hey, we agreed that we would check my email this way do plans this way follow up this way right, what are you referring to the standard, not the person messed up we're going to the standard.

463

01:17:34.680 --> 01:17:46.080

Stephanie Bogan: And I noticed this week or yesterday that this happened and that's a breakdown in the process, never the person just always say to break down and process easy words that you can borrow from me that will never get you into a struggle.

464

01:17:46.500 --> 01:17:51.960

Stephanie Bogan: it's breakdown in the process so it's important for us to adjust their process for our right, more and better calls meeting.

465

01:17:52.350 --> 01:18:08.220

Stephanie Bogan: Now conversations are cool, but you know what i've learned and we've really started doing this, a lot in the last year, because covidien 10 moves and five locations will really exacerbate your little problems is, you have to highlight those breakdowns and remedy them along the way.

466

01:18:09.450 --> 01:18:20.040

Stephanie Bogan: So we came up with what we call a breakdowns brief and i'm going to tell you I love this right and the idea is you identify when the breakdowns happen that's accountability buddy.

467

01:18:21.120 --> 01:18:32.640

Stephanie Bogan: hey I noticed that right, Mrs Smith called in, we did this, but normally we do this, that we don't have to stop we don't have to have a big conversation we don't have to have the eyeball rose on the wishing it gets better.

468

01:18:32.940 --> 01:18:41.760

Stephanie Bogan: We actually captured We note it somewhere, so we showed you guys how we use a sauna we have a little a whole card called breakdown briefs whoever notes the breakdown can go in.

469

01:18:42.600 --> 01:18:50.610

Stephanie Bogan: One of you said that you know the team didn't like calling a breakdown briefs that felt too serious I was like great so they call it a pain points pad.

470



01:18:50.910 --> 01:18:57.630

Stephanie Bogan: And they literally have an evil genius because it's so simple and easily in the office, it says pain points.

471

01:18:57.930 --> 01:19:08.580

Stephanie Bogan: And the markers on it and literally anyone can walk up and write down the pain point right the system didn't work the email didn't work that I didn't have my client meeting prep ready, the way we talked about.

472

01:19:09.030 --> 01:19:14.580

Stephanie Bogan: And then, once a week, they just go to the easel and they are starting to talk through the issues like what happened.

473

01:19:14.970 --> 01:19:25.350

Stephanie Bogan: Why did it happen, why is this not in line with the standard, what are we going to do to remedy it and guess how many times, you have to have that conversation before you realize whether it's really a people problem or a process from.

474

01:19:29.340 --> 01:19:36.210

Stephanie Bogan: 90 days you will always always know in any days I tell people I told let's write the process will save you you don't have to worry about.

475

01:19:36.570 --> 01:19:45.450

Stephanie Bogan: Whether they're in or out whether they're a fit whether they're not a fit your job is to hit the reset button paint the picture about how you're going to manage change in your organization.

476

01:19:45.810 --> 01:19:56.490

Stephanie Bogan: Which is really about managing people projects and priorities and people's perspectives in a way to get shit done right it's, this is not the elegant call of the year, but it's the honest call it fear.

477

01:19:58.140 --> 01:20:09.450

Stephanie Bogan: So resistance points is that your time is it your lack of delegation because you're afraid, or you haven't done the right training or you just don't have the right person and you're just not want to suck up dealing with it like.

478

01:20:09.780 --> 01:20:12.540

Stephanie Bogan: What are your real resistance points to getting stuff done.

479

01:20:13.590 --> 01:20:22.680

Stephanie Bogan: To have you hit a reset button for yourself, for your team for your projects right Mike if you need to be like hey this weekend i'm going to take three hours and i'm gonna sit down i'm gonna build out.

480

01:20:23.130 --> 01:20:34.080

Stephanie Bogan: An asana board or a spreadsheet to make sure that the run the shop stuff in the special stuff has



the lens that we can talk about consistency and create that accountability, so that I know.

481

01:20:34.380 --> 01:20:39.240

Stephanie Bogan: That things it's basically just like your mastermind meetings guys right it's like moving down the track consistently.

482

01:20:40.320 --> 01:20:45.570

Stephanie Bogan: And when you create a culture of that guess what happens when.

483

01:20:46.800 --> 01:20:57.960

Stephanie Bogan: things get done, because then you don't drive anymore, so we get really frustrated with our teams and i'm not discounting that there are sometimes good reasons for that, but I also know that we hire train the manager reward them we keep them.

484

01:20:58.710 --> 01:21:13.590

Stephanie Bogan: Which means that we're empowering the habit, so the job, the real job about creating change and limitless and any project decision choice email script you want to make is how do I make it happen.

485

01:21:14.610 --> 01:21:26.340

Stephanie Bogan: How do I make it happen, and you can make all the decisions you want, if your mindsets in the ways, you know that'll stuck you so again always reach out for those things right your mastermind should be really supporting those For those of you in masterminds.

486

01:21:27.120 --> 01:21:35.100

Stephanie Bogan: But how we show up how we let it happen, how we create that clarity, if we don't tell them we don't create like if we don't do those things.

487

01:21:35.460 --> 01:21:43.980

Stephanie Bogan: Then what happens is things break down and it compounds and we get really frustrated and, at the end of the day, we are 100% responsible so.

488

01:21:44.310 --> 01:21:57.420

Stephanie Bogan: identify those resistance points identify what is the reset that you want to have with yourself and or your person in your teams and then what is the system that you're going to use to reinforce it.

489

01:22:00.000 --> 01:22:06.450

Stephanie Bogan: what's the system right, you have a weekly meeting, are you going to have some form of breakdown brief, are you going to tie quarterly bonuses do things getting like.

490

01:22:06.900 --> 01:22:18.810

Stephanie Bogan: Are you and use key kpis how are you going to really create accountability for not just for them, but also for you, because you can't do 12 things and expect to get them done so it's really about.



491

01:22:19.140 --> 01:22:28.050

Stephanie Bogan: You guys have been playing with this for eight almost nine months now, and I know you're using it to varying degrees, with a lot of success, but this is that check in on.

492

01:22:28.740 --> 01:22:39.480

Stephanie Bogan: How do we really create the clarity around how to make the month we're going into growth retreat so you're going to have lots of great conversations exciting ideas actionable insights.

493

01:22:39.990 --> 01:22:49.650

Stephanie Bogan: stuff that you want to do to really drive to next year, so i'll pause there I know there's some stuff going on around the email resources.

494

01:22:50.220 --> 01:23:03.630

Stephanie Bogan: So we've got about 1520 minutes left so let's pause there and let's talk through some of the Liz Where are you in terms of applying that next step of the process, then, if anyone else has an issue drop it in the chat and we'll talk about it.

495

01:23:05.190 --> 01:23:19.410

Liz Hand, CFP®: So we had about 20 minutes for them to write down the tasks that they have and obviously that's not enough time to be complete or thorough, so I was just going to go through it, make sure they're done correctly and then ask them to relook at it continue on.

496

01:23:21.840 --> 01:23:26.130

Liz Hand, CFP®: yeah until I see them all mapped out I don't know after that what the stuff is.

497

01:23:26.400 --> 01:23:33.600

Stephanie Bogan: Right so once you get because remember involvement equals investment no different than clients and people procreate they take much more ownership of it.

498

01:23:34.350 --> 01:23:38.520

Stephanie Bogan: So what this is really about it's not punishing it's not judging it's not calling anyone on the carpet.

499

01:23:39.150 --> 01:23:41.280

Stephanie Bogan: Even if you're having performance issues, by the way.

500

01:23:41.640 --> 01:23:50.370

Stephanie Bogan: it's about creating that common language so that you can say hey i'm going to make sure that we're clear on what the expectations and the standards are what you need from us and what we need from you.

501

01:23:50.610 --> 01:23:56.460

Stephanie Bogan: Are the conversations we should always be having it shouldn't be mean you know you versus me, it should be, what are we both doing.



502

01:23:56.730 --> 01:24:07.860

Stephanie Bogan: To support the success of the role, so that when there's a breakdown Liz because sometimes that does happen, even after you set a standard you want to be right there to say hey you know what I know, last month, we sat down and we talked about.

503

01:24:09.030 --> 01:24:18.090

Stephanie Bogan: Doing X, Y or Z this way I know it's easy to slip back into those old habits, we agreed that we would you know that in order for the role to be successful, we really needed to focus on.

504

01:24:18.570 --> 01:24:25.440

Stephanie Bogan: doing it this way can we sit, can we sit down and talk about kind of what broke down in the process, so we can address it, is that a bad awful conversation.

505

01:24:26.760 --> 01:24:34.200

Stephanie Bogan: No it's none of that if we had them all along the way our people would either be awesome or they'd be gone that would be it.

506

01:24:35.220 --> 01:24:45.840

Stephanie Bogan: Now that doesn't mean we're perfect, by the way, cuz we're not, but what we ultimately need and there's the real the real part of this is you do need people who can deal with your brand of not perfect.

507

01:24:46.860 --> 01:24:51.780

Stephanie Bogan: I need people who can deal with the things about me that are a little bit more challenging right and you need Aaron people who like.

508

01:24:52.140 --> 01:25:00.420

Stephanie Bogan: it's not all sunshine and like so you've got to find that person in that dynamic, but so much of our lack of performance and our lack of productivity.

509

01:25:00.780 --> 01:25:09.360

Stephanie Bogan: is just how we're managing our people, our projects and your priorities right so getting clear on the few things we're going to do and i'm bringing this up now because we're going to the growth retreat.

510

01:25:09.900 --> 01:25:14.010

Stephanie Bogan: Right Nick you're gonna not going to leave with any less ideas that you have on your plate right now.

511

01:25:15.060 --> 01:25:23.790

Stephanie Bogan: But here's the thing I know limitless can feel overwhelming it's this constant thing, and I am constantly trying to figure out how to fix it and I realized, I can only do so much, and I only want to.

512



01:25:24.450 --> 01:25:35.580

Stephanie Bogan: Because, by the way, i'm as Nice as life is going to get when it comes to your priorities, life is never as gracious as we are it's like here's your shirt you got to handle it too bad, yes, Sir, thank you, Sir, please, we have another.

513

01:25:36.570 --> 01:25:40.380

Stephanie Bogan: it's not like oh i'm sorry Tom let's talk about your quarterly price that's not life.

514

01:25:41.520 --> 01:25:52.650

Stephanie Bogan: So dealing with an onslaught of opportunities and overwhelm and stories that's not going away, ladies and gentlemen, as long as you continue to grow and be more and better it's going to keep showing up in different ways.

515

01:25:53.100 --> 01:25:57.780

Stephanie Bogan: So we're job is to understand that we sit in the middle of that and how do we manage it.

516

01:25:58.860 --> 01:26:07.350

Stephanie Bogan: Do we have the clarity, do we have the transparency, the track for us and people to run on our time management or email systems or service models.

517

01:26:07.740 --> 01:26:13.680

Stephanie Bogan: or job descriptions or checklist like, are we really showing up and giving them what they need to support us fully.

518

01:26:14.670 --> 01:26:22.170

Stephanie Bogan: And if we're not and I love growth, I really do but don't grow until you fix that because you're going to compound the problems and really painful waves.

519

01:26:22.740 --> 01:26:29.850

Stephanie Bogan: And some of you are here to unwind those problems others if you are trying to create them and i'm trying to set the bar go no you don't have to do it that way.

520

01:26:31.890 --> 01:26:32.580

Stephanie Bogan: So.

521

01:26:34.440 --> 01:26:49.890

Stephanie Bogan: Tell me a little bit about how this shows up for each of you now that we've been talking about it a bit in terms of like how are you really managing your way through all this stuff on your plate through limitless through the mindset through the priorities through the people.

522

01:26:50.940 --> 01:26:52.440

Stephanie Bogan: Scott Sullivan, how about you.



523

01:26:53.490 --> 01:26:55.320

Stephanie Bogan: how's this how's the surface, for you.

524

01:26:59.580 --> 01:27:03.510

Scott Sullivan: Managing my time is still a challenge you and I have talked about that in the past.

525

01:27:05.070 --> 01:27:08.670

Scott Sullivan: Trying to do the success shifter and just being more.

526

01:27:09.690 --> 01:27:11.940

Scott Sullivan: aware of how I spending time.

527

01:27:13.860 --> 01:27:19.410

Stephanie Bogan: So one of the things when you're managing time what you're really managing is something way bigger than that.

528

01:27:19.800 --> 01:27:25.350

Stephanie Bogan: That we talked about right you're trying to manage agents that you're trying to own your attention which none of you are trying to do.

529

01:27:25.830 --> 01:27:36.870

Stephanie Bogan: which the world at large is paying a lot of people to keep you from doing this right truly the TV the commercials like there's so many competing interests like we are in an attention economy.

530

01:27:37.800 --> 01:27:50.400

Stephanie Bogan: So our number one job is to get agency over how we use our time the success shifter or the habits journal or their what I call anchors it's what atomic habits right really talks about is.

531

01:27:50.820 --> 01:27:57.930

Stephanie Bogan: There are, when I talk about high performance happiness or getting to that place where we're grooving and we're feeling good, and we feel like we're being effective and adding.

532

01:27:58.290 --> 01:28:09.870

Stephanie Bogan: We love that feeling right and when we're in that zone is because we're really focused on the things we need to be focused on and we're doing them well and when we do that we feel good, like every single time Aaron right every time.

533

01:28:11.400 --> 01:28:18.870

Stephanie Bogan: or issues that we don't spend enough of our time there, so when we think about those habits it's really about agency and the biggest thing that you can do here.



534

01:28:19.530 --> 01:28:29.820

Stephanie Bogan: So anchors are easing into that in a way that makes it much more doable impossible so anchors are those things that are your success habits Scott or Tom.

535

01:28:30.150 --> 01:28:35.190

Stephanie Bogan: or like what are the things that if you do, you always do better, when I meditate I always do better, when I run.

536

01:28:35.490 --> 01:28:43.110

Stephanie Bogan: or bike or get outside in the morning and move my body, I always do better right like when I drink water and don't eat bad stuff I always do better.

537

01:28:43.410 --> 01:28:51.660

Stephanie Bogan: But not 19 things so what I always tell people is when you want to start to take agency Scott, in this case over your time start with three simple anchors.

538

01:28:52.500 --> 01:28:58.980

Stephanie Bogan: What are three things that I can commit to every day for 30 days, no matter what.

539

01:28:59.460 --> 01:29:12.900

Stephanie Bogan: So don't make it Jill bigger than you can do like I can drink five glasses of water, I can meditate for 10 minutes and I can get outside for 10 every day, no matter what, if it's freezing cold winter and like I can always squeeze that in if I have to.

540

01:29:13.830 --> 01:29:26.430

Stephanie Bogan: But what you're doing is you're exercising agency you're building your discipline muscle, which is the biggest muscle, you need to discipline, so you discipline when you go to the gym, by the way, you're not really disciplining your muscles you're disciplining your willpower.

541

01:29:27.630 --> 01:29:32.880

Stephanie Bogan: And then, if you get those things you'll like and you've got the right mindset you're going to execute every single time.

542

01:29:34.560 --> 01:29:50.460

Stephanie Bogan: So Scott, in that case right, what are the three anchors like what are two or three things that you can do consistently to get control of your time, maybe it's only checking email at certain times, maybe it's having like are there some things that you can pick as your anchors there.

543

01:29:51.930 --> 01:29:55.110

Scott Sullivan: I think exercising every day is something I can do.

544

01:29:56.490 --> 01:30:03.120



Scott Sullivan: Whether that's just going for a walk or working out or whatever it is just do some physical activity every day.

545

01:30:06.660 --> 01:30:07.320

Scott Sullivan: and

546

01:30:08.820 --> 01:30:11.130

Scott Sullivan: Setting three priorities in the morning for my day.

547

01:30:11.730 --> 01:30:23.760

Stephanie Bogan: Okay, so your your three bags or mountains or whatever your top three if Scott does those every day, no matter how much bs is running around around him and he does them consistently guess what happens over time.

548

01:30:26.340 --> 01:30:35.220

Stephanie Bogan: In the midst of all that chaos, he is owning some piece of his mind and time and saying i'm carving out this piece it's mine damn it to mine.

549

01:30:36.300 --> 01:30:42.570

Stephanie Bogan: And if you can do that consistently for on average three days in my experience, but for a couple of weeks guess what happens.

550

01:30:43.560 --> 01:30:54.240

Stephanie Bogan: You don't have to worry about what not to do, because the Agency starts in the discernment when you get agency guess what you get get space for discernment hey if you're taking that walk then.

551

01:30:54.270 --> 01:30:59.220

Stephanie Bogan: If Scott just gets that five minutes outside that guess what happens in that five minutes nine times out of 10.

552

01:31:00.870 --> 01:31:01.830

Scott Sullivan: The light bulb goes off.

553

01:31:02.130 --> 01:31:05.430

Stephanie Bogan: there's some breathing or like something right some space to make something.

554

01:31:05.850 --> 01:31:13.260

Stephanie Bogan: So I want you to really think about what do you think about managing people like what are your anchors are they is it email, is it getting outside is it.

555

01:31:13.680 --> 01:31:25.230



Stephanie Bogan: And this is not obvious but it's good one, is it having the tough conversations right I call it lizard this you get to take your medicine now are you going to take it later in a much bigger does those uncomfortable conversations.

556

01:31:25.320 --> 01:31:30.570

Stephanie Bogan: Only grow like mold in the laundry like leaving them in there is not going to help.

557

01:31:31.470 --> 01:31:35.280

Stephanie Bogan: it's nastier and nastier because, at some point, you have a much bigger conversation.

558

01:31:36.270 --> 01:31:42.990

Stephanie Bogan: Right so it's a lot easier to say, and this is where those models help hey I realized this happen, this is not the standard we agreed to.

559

01:31:43.230 --> 01:31:50.010

Stephanie Bogan: In order to run things the way that we think are best for clients looks like a breakdown in the process can we sit down and talk about it at our next meeting great.

560

01:31:51.210 --> 01:31:53.670

Stephanie Bogan: By the way, guys blew my fingernails let's move on.

561

01:31:55.890 --> 01:32:03.780

Stephanie Bogan: Right it's the meaning we attached all of that that hangs this up, but I want to make sure you guys understand, like those resistance points the track is the script in this example.

562

01:32:04.800 --> 01:32:13.080

Stephanie Bogan: Right, you should always be looking for what's my track I don't have to create this from scratch, is there a script is there a model is there, like that's what is one of the.

563

01:32:13.950 --> 01:32:26.670

Stephanie Bogan: i'll say it right, because one of the great things are like there's a script there's a model like if not we'll figure one out quick like what do you need to bridge that span of distance to comfortably step into it that's what you want to figure out.

564

01:32:28.470 --> 01:32:36.000

Stephanie Bogan: And then you have in this, in this case, you have the tough conversations Liz if Liz continues to have that conversation one of two things will happen, what are they.

565

01:32:39.780 --> 01:32:48.420

Stephanie Bogan: performance will improve or people will leave either at your invitation, because you realize how crystal clear, it is via the process.

566



01:32:48.720 --> 01:32:51.120

Stephanie Bogan: That they're not going to get on board with your island at five o'clock.

567

01:32:51.480 --> 01:32:58.800

Stephanie Bogan: And this happens all the time, if you have loyal right hands trust me I know all about it over the years I can't tell you how many times i've seen it like they were there in the beginning.

568

01:32:59.070 --> 01:33:05.850

Stephanie Bogan: And then, as you grew they couldn't like wouldn't quite keep up and now you're in this weird space like you've got 17 variations these problems.

569

01:33:07.950 --> 01:33:13.110

Stephanie Bogan: But what I want you to be really clear on is how are you getting stuff done people.

570

01:33:14.460 --> 01:33:21.450

Stephanie Bogan: Projects like your priorities and then what's the projects what's that track that you're running them is this helpful to you guys.

571

01:33:23.460 --> 01:33:26.790

Stephanie Bogan: Am I hitting a nerve, or you just processing all right.

572

01:33:28.260 --> 01:33:31.920

Stephanie Bogan: All right, who has a people problem priority get stuff done issue.

573

01:33:33.720 --> 01:33:34.500

Stephanie Bogan: let's tackle it.

574

01:33:35.820 --> 01:33:39.750

Stephanie Bogan: we're going to hold this step up seat we're not calling it the hot seat to step up see what's.

575

01:33:39.990 --> 01:33:45.840

Limitless Adviser: Up Mike was asking about the process for getting his EA to manage more than his email to manage him.

576

01:33:45.990 --> 01:33:50.610

Stephanie Bogan: Okay, great same conversation we just don't have a breakdown, we have a step up hey.

577

01:33:51.090 --> 01:33:51.600

Stephanie Bogan: You know what.

578



01:33:51.630 --> 01:34:02.550

Stephanie Bogan: it's become really clear to me that, in order to take my business my time the value add clients to the next level I need to really take my time to the next level I gotta create a lot by leverage means I have to create a lot more.

579

01:34:02.940 --> 01:34:13.710

Stephanie Bogan: great clarity, transparency and accountability, with you and that's all based on trust, equity, which means, I have to show up make it clear what I want hey what I realized is you're doing great and there's so much more that's possible.

580

01:34:14.670 --> 01:34:18.060

Stephanie Bogan: Right so with the next level let's talk about what your role can be.

581

01:34:18.900 --> 01:34:23.250

Stephanie Bogan: Right hey I have friends in the coaching for right they're doing this they're checking their email they're doing this.

582

01:34:23.490 --> 01:34:30.930

Stephanie Bogan: How, how could we go about doing that got some samples of models sure right like so you're really just trying to create a framing conversation we're now, instead of saying.

583

01:34:31.170 --> 01:34:41.160

Stephanie Bogan: We have raised some resistance to more and better it's just like hey we're all that resistance has gone are now we're just leveraging momentum same conversation slightly different frame.

584

01:34:42.150 --> 01:34:50.730

Stephanie Bogan: Right hey you're doing really great right the island is now just the new rate and the next level of this role, I get really excited about your ability to help me, can we sit down and talk about that.

585

01:34:51.600 --> 01:35:01.620

Stephanie Bogan: And then Mike you want to paint the before and after it right at the level that you've been operating we've been doing this, and this, and this and that's been great here's what's working maybe some places, we can improve if there is that conversation.

586

01:35:02.070 --> 01:35:06.990

Stephanie Bogan: And at the next level right because most career ladders you're going to have two or three levels at the next level.

587

01:35:08.250 --> 01:35:17.370

Stephanie Bogan: Right so whether it's a training right someone's just easing into the levels over time if their goal is to get to level three or they're starting at Level one and you're moving them up the career ladder it's what's next Mike.

588

01:35:18.120 --> 01:35:21.900



Stephanie Bogan: Right hey at the next level it'd be really great if you could can we talk about how that would work.

589

01:35:22.560 --> 01:35:29.670

Stephanie Bogan: So you talk about it hey email is going to come in, could you do this, can you put an eye on it for info or a star or an explanation for you put it in this folder.

590

01:35:30.210 --> 01:35:36.090

Stephanie Bogan: And you work it up, you can use our models and examples, but again like no pride of ownership here tweak it to fit you.

591

01:35:36.840 --> 01:35:42.900

Stephanie Bogan: Have that conversation and then Mike at that point it's constant conversation, so I.

592

01:35:43.260 --> 01:35:52.440

Stephanie Bogan: strongly recommend with your right hand person, at least as a start, but I I just like to communicate, but what I call a daily huddle or a daily meeting.

593

01:35:53.010 --> 01:35:58.830

Stephanie Bogan: And then, some people like Michael have because he has one with his team, once a week right, because just time and different people.

594

01:35:59.250 --> 01:36:05.640

Stephanie Bogan: I like to do it daily because that right hand person really leverages your time and it's constant upgrade there's just constantly stuff.

595

01:36:06.330 --> 01:36:15.360

Stephanie Bogan: So if that person is doing that, for example, Mike then it might be like hey let's go through the inbox a little bit let's go through the inbox together for the next week, so I can show you what this looks like.

596

01:36:16.920 --> 01:36:30.150

Mike Rauth: yeah I use your use your you know process as a template and I built it out, and in my EA, by the way my he started two months ago i've never had any a before so we're both on a steep learning curve.

597

01:36:31.350 --> 01:36:48.300

Mike Rauth: Anyway, he loved that and he's he's managing my email that's working great my question is really more around, how do I get to the level where I think Chris was talking about where her he manages her and where yours is you that's that's where i'd like to get and you know.

598

01:36:49.680 --> 01:36:52.470

Mike Rauth: I don't know how to train them because I don't know how to do it either so.

599



01:36:53.700 --> 01:37:05.040

Stephanie Bogan: So I saw earlier in one of the chat someone asked if there was going to be a lesson or a course on training, the trusted system at some point, I am pleased to share with you next year there will be a course on training, the trust of the system that the trust and assistant.

600

01:37:05.460 --> 01:37:06.720

Stephanie Bogan: can actually attend.

601

01:37:07.680 --> 01:37:18.150

Stephanie Bogan: which will be really cool so obviously not to teach you, but that is ultimately coming because there's just a lot like I can teach them how to do it like I want you to look at this, I want you to do this, I want you to be thinking about this.

602

01:37:18.540 --> 01:37:27.120

Stephanie Bogan: And that's what you're ultimately teaching is that you guys don't always know what's possible and that's what we're trying to show you, which is step one you want them so Level one is just filtering.

603

01:37:27.540 --> 01:37:44.940

Stephanie Bogan: filtering takes time because it distracts you so if they do nothing except except put in like reading little shit to do later right and hot today that in and of itself keeps you focused, because then you as christy does you just go into the day folder and you don't get nearly as distracted.

604

01:37:45.960 --> 01:37:48.930

Stephanie Bogan: The next level, is what I call processing.

605

01:37:49.710 --> 01:37:58.320

Stephanie Bogan: Which means that stuff will come into my inbox and I don't actually see it before at least the processes it she'll be like oh Michael return the PowerPoint to allison for the growth retreat.

606

01:37:58.770 --> 01:38:04.050

Stephanie Bogan: And I went ahead and I looked at it and it was you know basically in line.

607

01:38:04.380 --> 01:38:11.700

Stephanie Bogan: or hey you know it looks like you might want some time on this one I scheduled a 30 minute work block for you to look at it later this week heads up Okay, thank you.

608

01:38:12.150 --> 01:38:18.660

Stephanie Bogan: Like i'll never even see that email just don't see it it'll show up on my daily huddle because I like to be informed about being informed as Lisa.

609

01:38:19.260 --> 01:38:27.810

Stephanie Bogan: um but that that's the tack that you're trying to create that rhythm with your person, and then the next level, is what I call Chief of Staff chief of staff.



610

01:38:28.230 --> 01:38:36.960

Stephanie Bogan: Where they are literally directing and you're like you're basically setting what I call the High Level strategy hey I want speaking engagements to run this way.

611

01:38:37.770 --> 01:38:47.880

Stephanie Bogan: Every time handle it just lump in and then you coordinate with Allison on the past, like literally someone invites me to speak I don't talk to them unless they really want to talk to me.

612

01:38:48.750 --> 01:39:01.950

Stephanie Bogan: Lisa gave us some this you know which are the options to speak about she talks to them, we think about you know 30 minute like whatever downloads blah blah blah okay great and then I will usually have a speaker prep call sometimes like hey here's you know, whatever.

613

01:39:02.400 --> 01:39:10.530

Stephanie Bogan: And then everything is scheduled Lisa will like PR our process, make sure that, like the social goes out, you know letting people know that I'm doing it like.

614

01:39:10.980 --> 01:39:21.750

Stephanie Bogan: So that's that third level where you, by the way you either have to have someone who's super kick ass and has been with you a while, because they know how you want things done, or you have to have the processes, I strongly encouraged processes.

615

01:39:22.230 --> 01:39:23.670

Stephanie Bogan: Right when we do a speaking engagement.

616

01:39:24.120 --> 01:39:35.790

Stephanie Bogan: Asked Lisa it's the same every time we had the conversation there's a fee right what's, the topic we scheduled time for me to review it PowerPoint gets reviewed right we define the call to action this social media like it's the same every time.

617

01:39:36.390 --> 01:39:42.120

Stephanie Bogan: So when you get to that third level make you get to where they're literally in that I call it producing.

618

01:39:43.050 --> 01:39:50.370

Stephanie Bogan: So it's filtering right call it preview, if you like you, because you know I love alliteration right and then that next level.

619

01:39:50.820 --> 01:40:05.040

Stephanie Bogan: right there, processing and the third level is they're producing and when you're producing I, by the way, I'm just a singer I show up I sing I talked to share ideas I don't do anything else it's not my job I think she'll share ideas that's my job I'll do anything else.



620

01:40:06.060 --> 01:40:11.970

Stephanie Bogan: Right and that's the level of training, by the way around your processes around your personality.

621

01:40:13.020 --> 01:40:19.590

Stephanie Bogan: Right and then around like to your point how you're co creating those processes, but those are the levels so if you if you look at the.

622

01:40:19.920 --> 01:40:28.830

Stephanie Bogan: Like the job description and the email policy, you can move people up those levels, based on your trust equity right you're not necessarily going to give a brand new virtual assistant.

623

01:40:29.100 --> 01:40:40.410

Stephanie Bogan: Complete domain over your email and hope it goes okay well, you are going to do Mike is walk through it hey for the first week we're going to go through my inbox together and i'm going to show you how I would filter based on the standard.

624

01:40:41.880 --> 01:40:53.850

Jill Hansen, CFP: stuff that I just wanted to say um I also hired you after listening Christie for a while, so same company that she used, and I was really surprised I thought i'd have to do a lot of training.

625

01:40:54.540 --> 01:41:03.750

Jill Hansen, CFP: And she really I mean if you, you know if you spend on a on a good pre trained person they already know.

626

01:41:03.930 --> 01:41:04.110

Jill Hansen, CFP: Like.

627

01:41:04.140 --> 01:41:04.440

Stephanie Bogan: Are you.

628

01:41:04.500 --> 01:41:05.580

Jill Hansen, CFP: Are you Hello.

629

01:41:06.360 --> 01:41:07.260

Jill Hansen, CFP: I am yeah.

630

01:41:07.800 --> 01:41:13.620

Stephanie Bogan: So if the new executive assistants they're not they're not super cheap, what is it like 50 or 75 an hour.



631

01:41:13.890 --> 01:41:16.380

Jill Hansen, CFP: yeah it was 5050 an hour so it's two.

632

01:41:16.440 --> 01:41:17.310

Jill Hansen, CFP: Grand you know.

633

01:41:17.610 --> 01:41:21.360

Stephanie Bogan: Every person I were on the waiting list, by the way, but every person.

634

01:41:22.200 --> 01:41:30.330

Stephanie Bogan: That i've talked to that use them has been really happy because they train people like how to be any like at the level that we often.

635

01:41:30.360 --> 01:41:33.180

Stephanie Bogan: I suspect we could have it, but like they are really good at.

636

01:41:33.180 --> 01:41:35.340

Stephanie Bogan: That leverage piece, as opposed to just like.

637

01:41:36.000 --> 01:41:42.570

Stephanie Bogan: You don't need someone, by the way, you're not going to pay somebody \$50 an hour 50 grand a year to just regurgitate ship to you like Oh, this is.

638

01:41:42.870 --> 01:41:47.100

Stephanie Bogan: No, I don't like I don't need you to move it from one side of the desk to the other, I need you.

639

01:41:47.400 --> 01:41:57.840

Stephanie Bogan: To leverage it at those different levels, based upon the caliber of the person, the time that they've been in the trait that seat in the training right Mike if they're brand new versus two years it's totally different.

640

01:41:58.470 --> 01:42:06.330

Stephanie Bogan: And then, our job is to hold them to that with the constant and what I hope you really get from this guys's it's all about the.

641

01:42:07.860 --> 01:42:11.190

Stephanie Bogan: The transparency in the conversation the transparency and the reinforcement.

642

01:42:11.550 --> 01:42:17.850

Stephanie Bogan: here's the standard we're going to an island that could be a tiny brand that could be a five minute conversation with someone hey I know we've been doing it this way.



643

01:42:18.150 --> 01:42:24.330

Stephanie Bogan: And that's been really great, but I picked up something that I want to try out so can we just have like Can we just chat for a couple minutes about that tweak.

644

01:42:24.750 --> 01:42:27.960

Stephanie Bogan: just another breeds a tiny version of the conversation great.

645

01:42:28.440 --> 01:42:38.340

Stephanie Bogan: I heard about this email thing my peers are using it, I really love to try it here's what we're going to do, blah blah blah we're going to block my calls for returns like whatever pick your change pick one change and ease.

646

01:42:38.670 --> 01:42:45.840

Stephanie Bogan: The person with that and use the model for change here's what I want to accomplish clarity here's what I want the outcome to be.

647

01:42:46.200 --> 01:42:55.230

Stephanie Bogan: Transparency here's how we're going to do it we're going to email it this way we're going to write it like whatever it is, and then accountability is you've got to be willing to show up and hold them accountable.

648

01:42:55.920 --> 01:43:10.920

Stephanie Bogan: hey, why does our mechanism for calling people out and then it's going to be one or two things, every time they're not doing what they need to do to step into the role or you're not doing what you need to do to support them in the role always assume it's the ladder.

649

01:43:12.390 --> 01:43:21.000

Stephanie Bogan: always assume it's the ladder until you have gone through the process of all the things that we teach you, because if you go through the process, it will be obvious, the process will save you.

650

01:43:21.510 --> 01:43:31.710

Stephanie Bogan: It will either be the person, and they will either step up because you weren't consistently right just holding them in a positive way, never did I break anyone down in this process.

651

01:43:32.220 --> 01:43:43.530

Stephanie Bogan: to a higher level, because we're relying on the process, the sauna this spreadsheet this standard no blaming that it's just hey we're looking at the spreadsheet this week we're looking at a sauna this week and it says this what happened.

652

01:43:44.640 --> 01:43:53.280

Stephanie Bogan: And that surfaces, the real issues, which is why the track is so important and then it's our job to take the time to address those issues when they surface and.



653

01:43:53.730 --> 01:43:56.130

Stephanie Bogan: i'm just going to say I love those issues called me.

654

01:43:56.520 --> 01:44:07.230

Stephanie Bogan: I don't love them in the sense of breakdowns aren't great, but I love helping with them because they are pretty easy to coach and we can schedule a 10 or 15 minute call talk about where you're at and move you forward um.

655

01:44:07.830 --> 01:44:10.170

Stephanie Bogan: So that's what today's call is really about is.

656

01:44:10.800 --> 01:44:29.400

Stephanie Bogan: Really, a wrap up of we talked about processes with Gavin and the systems and the workflows those are the models, those are the tracks that set the standards that's how you can let go because you've embedded quality you've embedded the outcome that you want now everything else is about.

657

01:44:29.430 --> 01:44:37.920

Stephanie Bogan: Managing people projects and praise the special side of it right managing them to run the shop is the HR, and this is like, how do we just.

658

01:44:37.920 --> 01:44:51.900

Stephanie Bogan: Keep it all going in a way that works so with that what was this helpful to you today in terms of like how all this makes into the project boards, the people management and the priorities and launch process was this was this helpful.

659

01:44:53.490 --> 01:45:01.260

Stephanie Bogan: All right, so your mission should you choose to accept it is to think about as we go into growth retreat because again you're going to want to come into that grooving.

660

01:45:01.560 --> 01:45:12.330

Stephanie Bogan: But I want you to come out grooving in the gear that's right for where you are whether that's first or second because you're getting your team and your ship in your shit in order to be quite honest.

661

01:45:12.870 --> 01:45:16.410

Stephanie Bogan: And that's sometimes the work asked me, I did some of that and still doing some of that.

662

01:45:16.770 --> 01:45:24.630

Stephanie Bogan: or you're really gearing into that growth mode right and some of you are just grooving like you found a good place and you're trying to enjoy it for a while.

663

01:45:24.930 --> 01:45:28.470

Stephanie Bogan: While you step into next year or the next level and that's Okay, too.



664

01:45:28.740 --> 01:45:39.360

Stephanie Bogan: But I want you to check in on what's your momentum right are you getting shit done, are you getting the right shit done, are you feeling good about it, and where you're, not because we all have resistance points, how are they showing up.

665

01:45:40.830 --> 01:45:49.530

Stephanie Bogan: And then, how can we start to address those breakdowns realistically systems people conversations project boards like talked about a lot.

666

01:45:50.250 --> 01:46:03.240

Stephanie Bogan: What are the the ingredients in your recipe to get your people team right, however, big it is if you're a wagon and you have more than when we have those wheels need to all be moving in synchronicity otherwise.

667

01:46:04.500 --> 01:46:08.160

Stephanie Bogan: And that's what we're feeling a lot, so it starts with us right we're on the unicycle.

668

01:46:08.700 --> 01:46:17.700

Stephanie Bogan: Right, then we had the base of the two seater bicycle right you and your virtual person he got to be pedaling and then we're at that word of the Olympics, where the Roman my watch that was crazy.

669

01:46:18.030 --> 01:46:32.160

Stephanie Bogan: I couldn't figure out who would want to get in the water, and just do this for like eight years of their life over and over but they're gonna make shape right but that's like if you saw did you guys see the Olympics like one of the best teams in the world.

670

01:46:33.360 --> 01:46:38.820

Stephanie Bogan: Like they're in those lanes where everybody's rowing what Come on, I can have a brain cramp was it called somebody help me out here.

671

01:46:39.840 --> 01:46:47.880

Stephanie Bogan: is growing and one of the boats like when you were watching from the visual and literally started to go off track in the lane because one person.

672

01:46:48.720 --> 01:46:54.210

Stephanie Bogan: was just a little out of sync and when you've got momentum which a lot of you do.

673

01:46:54.990 --> 01:47:05.790

Stephanie Bogan: that's where a lot of the pain points are when you have a lot of momentum, but you get out of sync and so you're rolling a lot down the field and it's a lot to manage right if you're one thing, and you have 12 clients it's actually a lot easier.



674

01:47:06.000 --> 01:47:16.950

Stephanie Bogan: it's more stressful but easier So hopefully That gives you guys a grounding for today to really assess where you are in terms of getting your clarity about what you want to get done and then.

675

01:47:17.220 --> 01:47:26.460

Stephanie Bogan: The resistance points between you and really becoming a maestro and master right super mojo person at getting not just shut down but getting the right shit done.

676

01:47:27.180 --> 01:47:33.360

Stephanie Bogan: right with that it is time to conclude today's call if you have issues questions, please drop them on tribe, I will be checking in.

677

01:47:33.630 --> 01:47:42.150

Stephanie Bogan: Between now and the end of the week, as we head into growth retreats and I, as I said earlier, cannot wait to connect with all of you it's going to be fantastic, and we will see you there.

