

# LIMITLESS Coaching Call - 2nd Monday

## 10/11

8

00:00:36.390 --> 00:00:39.840

Stephanie Bogan: Good morning, or good afternoon everybody, how are you all today.

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00:00:43.500 --> 00:00:50.820

Stephanie Bogan: Cathy good to see you Aaron Nick josh, as always, how is everybody today.

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00:00:52.500 --> 00:00:52.860

Josh Ackerman: Great.

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00:00:54.510 --> 00:00:55.200

Michael - Frontier Wealth Strategies: outstanding.

12

00:00:55.680 --> 00:01:08.250

Stephanie Bogan: week, we have a lot to cover today, so I am going to dive right in I think we have our technical issues resolved this is our coaching call, but just our general housekeeping as always.

13

00:01:09.000 --> 00:01:19.350

Stephanie Bogan: So we're going to talk today about quarterly Business Review and planning and set some accountability calls for Q4, so I hope you've got your seatbelts fastened and you're ready for that.

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00:01:19.770 --> 00:01:25.530

Stephanie Bogan: allison is out today it's her birthday and she's hanging out with her boys, which is a great thing to be able to do.

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00:01:25.800 --> 00:01:36.930

Stephanie Bogan: She wanted me to let you know that you all need to be like Kathy pinard and connect on tribe, and we had our summer low we had retreat, some of you are in surges obviously keep it very focused.

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00:01:37.380 --> 00:01:43.080

Stephanie Bogan: But it's really important to your connection and your progress which we'll talk about to please check in once a week.

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00:01:43.320 --> 00:01:56.400

Stephanie Bogan: See what's going on with your peers see what messages i've dropped interact there's good conversations right now about do role and holiday gifts and some marketing stuff so there's good conversations and good collaboration to happen they're.

18

00:01:57.450 --> 00:02:10.110

Stephanie Bogan: Also, more tribe talks will be coming this year we're working with tanya and the other coaches, if you guys have any ideas or requests for tribe talks, please feel free to drop those in the inbox or on tribe and.

19

00:02:10.860 --> 00:02:17.880

Stephanie Bogan: We are going to be doing a more organized schedule for tribe like a we try every year new things you guys know we

practice in public.

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00:02:18.120 --> 00:02:26.490

Stephanie Bogan: tribe talks have been really cool this year Ray there's not 80 or 90 people on them there's three or eight or 23 depending on the topic.

21

00:02:27.150 --> 00:02:40.110

Stephanie Bogan: But they're very specific on a specialized subject right really working through telling your story or breaking down how to write build an actual service model is it a spreadsheet or CRM your workflows.

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00:02:40.530 --> 00:02:47.490

Stephanie Bogan: So, as you guys have requests or ideas, let us know, because when we get groups of people together, we can have even better conversations so we're going to.

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00:02:47.790 --> 00:02:57.180

Stephanie Bogan: actually have a schedule for tribe talks next year with things that we put on the agenda and then additional slots for things that you guys put on the agenda so i'm pretty pretty excited about that.

24

00:02:58.440 --> 00:03:04.140

Stephanie Bogan: coaching calls on October 25 aren't your team, which is our what we call web services firm.

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00:03:04.770 --> 00:03:14.190

Stephanie Bogan: They do all the guts of our marketing machine right building the landing pages getting the emails tagged and out and infusionsoft we've done all that we sometimes do it.

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00:03:14.820 --> 00:03:23.280

Stephanie Bogan: You get a lot more scale and leverage when you use your people, and your time to re think and conceive and create what is going into that machine.

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00:03:23.610 --> 00:03:31.770

Stephanie Bogan: So i've asked tiffany one of the owners of entre team to come talk with you, because this is just a topic for everyone, even if you're considering.

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00:03:32.070 --> 00:03:43.110

Stephanie Bogan: Adam is going to talk later this year about integrating email campaigns into how you find the gauge, and yes, even service clients right those rough sober things aren't happening right there happening via email.

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00:03:43.890 --> 00:03:48.600

Stephanie Bogan: So we're just going to really make sure that you guys get some more insight in detail around what.

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00:03:48.990 --> 00:03:57.300

Stephanie Bogan: The functionality of that is what web services firms do i'm big fan of ours, because they are reliable and responsible and reasonable.

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00:03:58.110 --> 00:04:08.040

Stephanie Bogan: Should kind of my things, but I want you really not necessarily to hire them, I really want you to really be able to dig in and ask questions around that number eight I will be doing.

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00:04:08.580 --> 00:04:19.470

Stephanie Bogan: sans least this year, but I will be doing a try not to cry right now, I will be doing our annual coaching call on your relationship with money which is really important.

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00:04:20.220 --> 00:04:29.700

Stephanie Bogan: You know, we didn't have at least a good chunk of this year, so we you know sort of made some shifts to to accommodate what we hoped would be her returning that has not been the case.

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00:04:30.150 --> 00:04:37.470

Stephanie Bogan: So i'm going to pull some of that in, and then we will have a very defined and deliberate track around that next year, which i'm.

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00:04:38.130 --> 00:04:45.300

Stephanie Bogan: In a very good way excited about the evolution there, but obviously will miss ELISE but the relationship to money call.

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00:04:45.660 --> 00:04:53.460

Stephanie Bogan: is really about how you frame your relationship with money, which is the key driver in general and how much of it, you will allow yourself to make.

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00:04:53.850 --> 00:05:00.780

Stephanie Bogan: So, if you would like to if you find yourself against any resistance points when it comes to up leveling your financial success.

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00:05:01.110 --> 00:05:08.310

Stephanie Bogan: Your you know your fear or your abundance mindset around money, this is really an important driver in our success and well being, I think.

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00:05:08.670 --> 00:05:13.950

Stephanie Bogan: The relationship between the voices in our head and our quality of life in our financial life, I think, became.

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00:05:14.370 --> 00:05:23.370

Stephanie Bogan: Really apparent to everyone on mass over the last two years, is why you're seeing such a rise in the demand for advice, but we're all experiencing that too.

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00:05:23.640 --> 00:05:33.480

Stephanie Bogan: So it's also an incredible time in a changing landscape, to really drive very concentrated growth that's what we're seeing here at limitless it's what i've seen with private clients.

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00:05:33.900 --> 00:05:44.940

Stephanie Bogan: So we want to make sure that you're not working really hard on all those external forces and not really aligning with the inner forces that are going to really help you take that step up in terms of your own.

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00:05:45.360 --> 00:05:57.240

Stephanie Bogan: relationship with money and financial abundance so look forward to talking with all of you about that in November and then it's not on here, but our Chris are our first call in December, which will be our last call of the years or holiday party.

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00:05:57.720 --> 00:06:05.280

Stephanie Bogan: Last year we did an ugly Christmas sweater contest and jokes that was pretty fun we've got some surprises planned for this year, so be on the lookout for that.

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00:06:06.570 --> 00:06:13.230

Stephanie Bogan: Alright, so this month limitless coaching call is really brought to you in service of.

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00:06:13.680 --> 00:06:21.660

Stephanie Bogan: Helping you not dive into new topics, but as we wrap up quarter three and we're three quarters of the way through the year.

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00:06:21.930 --> 00:06:31.680

Stephanie Bogan: Really revisiting and refreshing on the idea of how we plan and manage the priorities that ultimately determine whether or not, or how much.

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00:06:31.920 --> 00:06:41.460

Stephanie Bogan: We move the needle in our businesses, each year, so I thought post growth retreat, it would be a really good time to pause and reflect on the q3.

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00:06:41.850 --> 00:06:50.070

Stephanie Bogan: That you completed go back through the quarterly business review will actually is i'm going to share a lot everyone who's ever who's been here for more than one year knows.

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00:06:50.400 --> 00:06:56.280

Stephanie Bogan: That right, this time, every year, I start telling you about all the changes over everything, based on what we learned in your feedback this year.

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00:06:56.760 --> 00:07:04.860

Stephanie Bogan: And so One of those is, I think it was in one of our mastermind check ins if you're here, he can feel free to raise your hand but someone said.

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00:07:05.190 --> 00:07:12.930

Stephanie Bogan: You know the quarterly business reviews are great could, could you do that with us on a structured basis, to make sure that we're actually doing it and doing it right, and I was like.

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00:07:13.320 --> 00:07:21.870

Stephanie Bogan: Percy can that's what we're in the business of doing so next year with masterminds will be baking that into the process, but as you guys know I don't want to wait.

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00:07:22.230 --> 00:07:30.000

Stephanie Bogan: I want to make sure that we're that we're taking that learning and applying it so really want to take this call to go back to the quarterly business review process now that you've gone through.

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00:07:30.390 --> 00:07:41.820

Stephanie Bogan: A few quarters of the planning and the prioritizing have you assess how that's going and then we're going to do a Q4 look forward and we're going to make sure that you've got clarity on the priorities.

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00:07:42.120 --> 00:07:52.140

Stephanie Bogan: That you're going to be focusing on in Q4 and also in the vein of moving in the direction of applying what we're learning as we go is we're going to do to breakouts today.

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00:07:53.040 --> 00:07:59.880

Stephanie Bogan: And I want you know we're going to do this with allison so Nicole and Leona and I are ready we've done our tech prep like we are on our game.

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00:08:01.440 --> 00:08:08.460

Stephanie Bogan: series because everybody good mojo but we really want to make sure, especially now that you have finally had the chance.

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00:08:08.760 --> 00:08:14.730

Stephanie Bogan: For most of you to connect and engage in person is make sure we're making more and more of that into.

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00:08:15.120 --> 00:08:22.470

Stephanie Bogan: What we have not no longer calling a program but really more calling our Community so we're gonna have you break out get really clear on how q3 which.

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00:08:22.800 --> 00:08:29.250

Stephanie Bogan: Where you're going and Q4 and then we have an accountability surprise at the end because, in case you didn't hear.

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00:08:29.610 --> 00:08:37.470

Stephanie Bogan: I have sat down all fear of public shame or humiliation, I wrapped in front of 1000 plus people so it's game on over here.

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00:08:37.800 --> 00:08:52.650

Stephanie Bogan: I am taking it up a notch I am just going to be clear and even more compelling about holding you accountable to what's possible so we're going to have an accountability surprise at the end of today's call all right, are you guys ready, ladies.

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00:08:54.030 --> 00:09:02.220

Stephanie Bogan: All right, I am also supposed to share the results of the retreat survey with you, which i'm always really excited to do you guys know.

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00:09:02.610 --> 00:09:13.800

Stephanie Bogan: We believe that feedback is our friend right good bad or otherwise it's all about learning and growing the good news to report is that feedback was overwhelmingly positive, I think this is the highest rated retreat.

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00:09:14.280 --> 00:09:24.300

Stephanie Bogan: we've ever had in there really highly rated you guys rated the experience and 9.5 out of 10 and the keynotes and the engagement, where the big big takeaways.

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00:09:25.110 --> 00:09:33.900

Stephanie Bogan: Things that we learned, you know, it was not the world's most awesome hotel service what you know, but I try to remember what was available and that there were people working.

68

00:09:34.740 --> 00:09:45.330

Stephanie Bogan: But I think we all acknowledge that it was Okay, but it was not you know over the top in terms of just the hotel the experience the shuttle thing in general, the venue worked great.

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00:09:45.960 --> 00:09:56.070

Stephanie Bogan: We did have some issues nothing super major but I know some of you, we had some logistics issues in terms of getting to the venue from the hotel the hotel.

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00:09:56.910 --> 00:10:05.490

Stephanie Bogan: website and our arrangement with them, they were supposed to have shuttles every 15 minutes, and when we got there they literally said we don't have shuttles until two o'clock so.

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00:10:06.420 --> 00:10:12.420

Stephanie Bogan: One we should obviously need to do a better job of communicating with the hotel around those kinds of changes.

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00:10:12.930 --> 00:10:23.910

Stephanie Bogan: But to this isn't, this is a, this is the kind of very pinpoint learning that doesn't seem like a big deal, but it really matters to your experience, so I want you to think about these same kinds of things in your own practice which is.

73

00:10:25.110 --> 00:10:33.900

Stephanie Bogan: We sent you the information on all the logistics kind of beautiful he designed very simple well organized PDF inside an email.

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00:10:35.190 --> 00:10:37.770

Stephanie Bogan: Which means that you had to do what to get to the PDF.

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00:10:38.970 --> 00:10:49.200

Stephanie Bogan: It opened the email, and then you had to read it, and then you click on the PDF that's three steps do I know better than to give you key information in less than three steps, yes, I do.

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00:10:50.070 --> 00:10:58.560

Stephanie Bogan: Learning gap like hey guys need to communicate that when we're doing things like this if it's Critical Information, it cannot be behind three steps.

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00:10:58.980 --> 00:11:07.080

Stephanie Bogan: One regulars a third of them and even opening email third if you just weren't open even it's from limbless, even though I tell you to open every email like a third if you just want to open it.

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00:11:07.530 --> 00:11:15.300

Stephanie Bogan: Second third will read it, but not click through rate, so there were a few of you that just didn't click all the way through, and so, while the information was there.

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00:11:15.510 --> 00:11:20.100

Stephanie Bogan: You just had an access to it, which created a breakdown in your experience right, this is great learning for us.

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00:11:20.610 --> 00:11:27.330

Stephanie Bogan: Great learning for great I try to when I get emails from events boring, though they may be, I really try to make sure someone on my team.

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00:11:27.900 --> 00:11:32.130

Stephanie Bogan: reads all of those details and picture that all those things are taken care of.

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00:11:32.460 --> 00:11:44.010

Stephanie Bogan: So another just point of leverage for those of you on checking email and having teams like someone on your team should be checking those things and telling you here's what you need here's what you're going here's the PDF here's your game plan.

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00:11:45.180 --> 00:11:50.430

Stephanie Bogan: will do lots more talk about using your assistance next year as well, and probably do try this year.

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00:11:51.090 --> 00:11:58.020

Stephanie Bogan: Alright, so if you guys have any further feedback on tribe I knew i'm going fast, but I want to get to the meat of today, but this stuff is important.

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00:11:58.770 --> 00:12:05.340

Stephanie Bogan: The workbooks for great we kind of align those with the agenda and just integrated those a little bit better, to be honest and.

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00:12:05.730 --> 00:12:12.300

Stephanie Bogan: I think, given you I think some of you would really have like the online version and an editable format, so we will note that for next year.

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00:12:12.810 --> 00:12:21.900

Stephanie Bogan: and always be tried to work more time one of you two of you, I think, in particular, communities more had the idea of working more working time in the agenda.

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00:12:22.530 --> 00:12:31.650

Stephanie Bogan: Great time to stop breakdown start working on an exercise which by the way, helps sinking into your brain and create context for when you go back to it later we can't do that on every topic.

89

00:12:32.040 --> 00:12:39.240

Stephanie Bogan: But we are very much looking at the week for next year between leaders boot camps masterminds and lifestyle.

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00:12:39.540 --> 00:12:53.490

Stephanie Bogan: And working it out, so that there are those breaks or extra time available to do those kinds of working groups, both with your masterminds and, like in a follow up group setting, so we will keep you guys posted on that, but again any and all ideas are welcome.

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00:12:54.750 --> 00:13:00.270

Stephanie Bogan: Alright, any questions about or feedback about retreat before we get to the meat of today's discussion.

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00:13:02.010 --> 00:13:03.780

Stephanie Bogan: guess I should turn on the chat so I can see.

93

00:13:05.940 --> 00:13:10.950

Stephanie Bogan: Kathy great point Kathy made a comment that it would be great to record the breakout sessions.

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00:13:12.060 --> 00:13:15.030

Stephanie Bogan: Are you talking about retreat or on the on these calls.

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00:13:16.710 --> 00:13:27.870

Cathy Pinard, CPA: You know at retreat, but I know it's hard because you've got like two and three groups at a time for groups at a time, but um you know, would have been nice to have it's sometimes hard to pick which one you want to go to that's all.

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00:13:28.260 --> 00:13:29.730

Stephanie Bogan: Yes, and that's you know.

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00:13:29.790 --> 00:13:31.170

Cathy Pinard, CPA: that's admits mean they're good, though.

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00:13:31.800 --> 00:13:37.500

Stephanie Bogan: That is part of the challenge, which is where we try to rotate the agenda rates with that there's always something fresh for you to come back to.

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00:13:37.800 --> 00:13:42.960

Stephanie Bogan: i'll be honest, it gets really expensive to record every session with that level of sound right and so.

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00:13:43.440 --> 00:13:53.550

Stephanie Bogan: You guys the honest answer is like, as we get more Members right, we have a bigger budget, and then we get to just like I only take like we have a margin that we hit and everything else goes back in the business.

101

00:13:53.880 --> 00:14:01.410

Stephanie Bogan: So that's what we're always managing is right budget relative to the experience relative to the number of people having experience and you guys know that that's.

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00:14:01.770 --> 00:14:09.270

Stephanie Bogan: that's business um but yeah I think that's a great idea I would love to record every single session that we ever did catalog it right and so that's.

103

00:14:09.630 --> 00:14:17.970

Stephanie Bogan: As over time, as you guys have seen the library really starts to build up we've got which I will show you because I think it's next.

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00:14:18.480 --> 00:14:28.260

Stephanie Bogan: Speaking of Kathy look at that, so one of the bits of feedback that we've gotten on the website from the website advisory board Thank you all very much.

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00:14:29.100 --> 00:14:37.140

Stephanie Bogan: Is that it would be really helpful, we got some great feedback about just minor changes, we can make that we can make to make things easier.

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00:14:37.560 --> 00:14:45.000

Stephanie Bogan: But one of the pieces of feedback that we got that we felt was really relevant and something that we could readily do was create a courses page.

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00:14:45.300 --> 00:14:52.440

Stephanie Bogan: That just let you easily see all the courses, not so much in a list format which really starts to look like marshmallows to your brain.

108

00:14:52.920 --> 00:15:02.940

Stephanie Bogan: But as you see it here in a way that you can go through to Kathy's point and be like oh what was that breakout I miss like I don't even remember that I missed it or hey I didn't realize, there was a lesson on.

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00:15:03.300 --> 00:15:12.930

Stephanie Bogan: So, in the current library, you have to know what you're looking for at least the general topic, and so we thought it would be very helpful to give you a view of just what topics were available.

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00:15:13.260 --> 00:15:25.470

Stephanie Bogan: so that you could go through and peruse there and again it will continue to add over time and will continue to reorganize it, but this year we turn this on for you guys, if you want to access it in this way, so hopefully that will help you.

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00:15:27.390 --> 00:15:36.570

Stephanie Bogan: All right, Aaron had a question about limitless for next year I, you will be getting an email on that we are just literally working through all the logistics and making sure that that is all.

112

00:15:36.990 --> 00:15:47.970

Stephanie Bogan: tied up with a bow and very clear and simple and organized for you and that the team has everything ready that they need to support you in making that decision for next year, so be on the lookout for that.

113

00:15:48.690 --> 00:16:00.930

Stephanie Bogan: ASAP so Aaron thanks for bringing that up all right do check out this page because there's some really cool stuff in here um alright so we're going to talk about our Q3 and Q4 priorities.

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00:16:01.410 --> 00:16:08.760

Stephanie Bogan: And as part of that because we had a growth retreat in there, we felt like it would be valuable from a coaching perspective to stop.

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00:16:09.300 --> 00:16:21.420

Stephanie Bogan: This was in the playbook some of you were in Michael session, some of you were in the the mapping session, but this is the marketing extra playbook but she's the team is going to drop in the chat for you right now, if it's not already there.

116

00:16:22.680 --> 00:16:29.190

Stephanie Bogan: right there it is so if you don't have a copy of that handy, this is the link that you can download.

117

00:16:29.610 --> 00:16:37.350

Stephanie Bogan: And I want you, because we're going to we're going to break out and really talk about your priorities for Q3 and a little bit is just take you through this process.

118

00:16:37.950 --> 00:16:46.500

Stephanie Bogan: And, have you start to think about your marketing map your marketing action playbook like what's your game plan, just like teams right they draw out their playbook.

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00:16:46.830 --> 00:16:56.190

Stephanie Bogan: Everyone in the team knows the playbook they memorize the playbook and then they write when they're on the field and it's so time and game time they execute the plan.

120

00:16:56.640 --> 00:17:06.720

Stephanie Bogan: Right and the goal is to get the ball across the finish line and win the game so same thing with marketing is I want you guys to just piece of paper cocktail napkin or you can download this.

121

00:17:07.080 --> 00:17:17.520

Stephanie Bogan: Will print it out, if you can do that quickly is really get clear on what are the goals and objectives for your marketing plan so when you think about next year and your three year runway.

122

00:17:17.910 --> 00:17:24.480

Stephanie Bogan: What is it that you're trying to accomplish in terms of growth goals and Michael and I think did a pretty fair job of.

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00:17:25.020 --> 00:17:32.430

Stephanie Bogan: Of really idea of defining the idea that growth can obviously be in revenue in a UN, but it can also be in right.

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00:17:32.700 --> 00:17:39.600

Stephanie Bogan: Quality of organization right improving our operational efficiency and your well being or time off in our happiness.

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00:17:39.930 --> 00:17:49.110

Stephanie Bogan: So some of you are here to grow revenue, some of you are here to grow, you know simplicity you've got great revenue, but you need simplicity and a little bit of life back.

126

00:17:49.410 --> 00:17:59.430

Stephanie Bogan: Right, some of you are growing through you know those stages of business that require you to work in and on the business as you put those pieces in place because they're just not there yet.

127

00:17:59.910 --> 00:18:14.130

Stephanie Bogan: And so, this is a good opportunity post birth retreat as we hit Q4 so i'm going to pause for about a minute or 90 seconds and ask you to think about the things that you see on the screen in terms of get really clear on what you're trying to accomplish with your growth goals.

128

00:18:15.390 --> 00:18:18.420

Stephanie Bogan: either for next year or in a three year time frame, however you're defining.

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00:18:24.660 --> 00:18:31.230

Stephanie Bogan: and, ideally, you will write it down because that's what makes it real to your brain so when you think about things.

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00:18:31.560 --> 00:18:39.120

Stephanie Bogan: And you're like oh i'd like to do that it's not nearly the same as writing it down which isn't nearly as effective as rate putting it up.

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00:18:39.480 --> 00:18:48.120

Stephanie Bogan: Looking at it, as part of your daily review and your goals, looking at the person on your screen going through at your weekly meetings right whatever those four reinforcing mechanisms are.

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00:18:49.230 --> 00:18:54.480

Stephanie Bogan: All right, who's got a goal that they want to share Clinton Miller what's your goal what's your growth go.

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00:18:56.790 --> 00:19:05.280

Clinton Miller: If you can hear me or not my goal is to talk with five centers of influence, next year, I have a list that i've started.

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00:19:07.890 --> 00:19:09.780

Clinton Miller: That seems like a good strategy for me.

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00:19:10.020 --> 00:19:16.650

Stephanie Bogan: Right, so you want to basically pilot is you is what a relationship building campaign with those five CEOs.

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00:19:17.610 --> 00:19:18.630

Stephanie Bogan: yo great.

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00:19:19.860 --> 00:19:34.050

Stephanie Bogan: Alright, so in this case right What would you like i'm just going to walk through kind of the rest of the questions you guys can go through this relative to your goals it what will that mean in terms of new client relationships assets were my my favorite revenue.

138

00:19:35.880 --> 00:19:37.920

Stephanie Bogan: Like How would you define that a good outcome there.

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00:19:40.920 --> 00:19:46.080

Clinton Miller: Oh, I would define a good outcome as a new ideal client.

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00:19:47.880 --> 00:19:48.600

Clinton Miller: Next year.

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00:19:49.650 --> 00:19:50.160

Stephanie Bogan: one.

142

00:19:54.090 --> 00:19:56.910

Clinton Miller: let's say one per quarter okay great.

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00:19:58.740 --> 00:19:58.980

Clinton Miller: Right.

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00:20:00.030 --> 00:20:06.870

Stephanie Bogan: All right, and what is the just the size, how would you characterize the size your revenue of the the ideal client just so we're all super clear.

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00:20:09.180 --> 00:20:11.880

Clinton Miller: have turned 50,000 at least.

146

00:20:12.150 --> 00:20:13.620

Clinton Miller: And yeah.

147  
00:20:14.700 --> 00:20:22.980  
Stephanie Bogan: 2500 ish in revenue so okay all right, so do you feel clear about that now than you did a few minutes ago.

148  
00:20:25.980 --> 00:20:29.640  
Clinton Miller: i've been thinking about it for a while it's one of the things I want to do next year.

149  
00:20:31.500 --> 00:20:33.930  
Clinton Miller: But yeah in terms of the outcomes, I do feel a little bit clearer.

150  
00:20:34.200 --> 00:20:41.880  
Stephanie Bogan: Right, because now it's gone from right this concept in your head to concrete right measurable.

151  
00:20:42.450 --> 00:20:48.540  
Stephanie Bogan: things that we can now take action on right do you see the difference so that's why doing these exercises.

152  
00:20:48.960 --> 00:21:01.290  
Stephanie Bogan: Great coaches and consultants don't have you all do this just to humor ourselves as we watch you rate spin around and fill out forms it's not what it's, for it is because it is a clarifying exercise, how many times, if you had.

153  
00:21:01.680 --> 00:21:06.510  
Stephanie Bogan: A goal, you had ideas come in and build this tech platform i'm going to build this advice.

154  
00:21:06.780 --> 00:21:12.720  
Stephanie Bogan: And, but when you get to it, it just felt like cutting like to me that tomato with a dull knife right it just wasn't.

155  
00:21:12.990 --> 00:21:22.290  
Stephanie Bogan: And then other times you have that clarity and that clarity comes from knowing what actions will align with the outcome, and when we don't create the clarity of the outcome.

156  
00:21:22.590 --> 00:21:31.290  
Stephanie Bogan: It means that we're effort in a lot more, instead of just exercising that agency and discernment in terms of where we spend our time and focus that we're talking so much about.

157  
00:21:31.590 --> 00:21:43.770  
Stephanie Bogan: So now we can take clinton's example or michael's we're dance we're ryan's and say Okay, how do we translate that into reality, like who's the audience what's the budget rate as you look at those.

158  
00:21:44.220 --> 00:21:49.200  
Stephanie Bogan: And then, when you think about your calendar for next year Clinton, how do you translate that into reality.

159  
00:21:50.160 --> 00:21:55.380  
Stephanie Bogan: Right so i'm going to go through cleanse audience in this case CEO is for this particular objective.

160  
00:21:56.010 --> 00:22:09.300

Stephanie Bogan: Right, how did you find them 100 in this case five hey I already have a list okay work done budget money right, whatever that may be probably not the biggest part in the coi campaign what's the other big budget and coi campaign.

161

00:22:11.220 --> 00:22:19.350

Stephanie Bogan: it's your time right and what did Michael teach you about the value of that time relative rate what you've learned here about the value of your time in terms of.

162

00:22:19.800 --> 00:22:31.260

Stephanie Bogan: Using it well, and what we talked about in terms of the value of a client over the lifetime and why it's an investment so Clinton how how much time do you want to devote in your calendar to making that.

163

00:22:32.460 --> 00:22:33.120

Stephanie Bogan: a reality.

164

00:22:34.350 --> 00:22:35.220

Stephanie Bogan: What do you think it will take.

165

00:22:36.840 --> 00:22:39.120

Stephanie Bogan: You guys should all be asking yourself the same questions.

166

00:22:41.460 --> 00:22:43.890

Stephanie Bogan: Right, whether it's one client or 50 clients.

167

00:22:47.610 --> 00:22:49.890

Clinton Miller: I think it's going to take.

168

00:22:51.870 --> 00:22:58.800

Clinton Miller: Several meetings with each person potentially or several touches and setting aside time every week.

169

00:23:00.360 --> 00:23:04.140

Clinton Miller: To actually plan and follow through on a campaign, instead of.

170

00:23:05.100 --> 00:23:06.480

Clinton Miller: Right so you're gonna have emails pure.

171

00:23:07.410 --> 00:23:16.410

Stephanie Bogan: Right campaign project plan that's the coi right cultivating cri listen gives you the track to run on that models examples right tweak that that will.

172

00:23:17.370 --> 00:23:26.910

Stephanie Bogan: write tiffany's ways one way our ways one way you're each going to rate, if you don't have a way follow one of our ways and then you'll figure out what yours is don't let that stop you.

173

00:23:27.360 --> 00:23:33.360

Stephanie Bogan: But what you hear him saying and Brian same thing for you, Andrew same thing for you chest same thing for you Liz like.

174

00:23:33.960 --> 00:23:40.860

Stephanie Bogan: what's it going to take in terms of time and money, because if it doesn't show up on your calendar it's a wish.

175

00:23:41.190 --> 00:23:46.890

Stephanie Bogan: Not something that's really going to make happen right so that's remember the calendar is what makes the vision a reality.

176

00:23:47.580 --> 00:24:00.090

Stephanie Bogan: So Clinton now has the clarity that he needs a campaign he needs a project plan ready process to define how he works with them he's good he doesn't just want to randomly calling go to lunch put his heels together and hope it works out okay.

177

00:24:00.570 --> 00:24:10.200

Stephanie Bogan: But learning right he got it that's the goal that's why we share that with you there's a much better way to use your time there Clinton and that that lesson will guide you through it.

178

00:24:11.040 --> 00:24:15.480

Stephanie Bogan: And then it's about making sure that the time budget is applied.

179

00:24:16.470 --> 00:24:23.970

Stephanie Bogan: And then, how do we prepare for that how much time do I need to plan my presentation what's going to be in it, what am I going to say what am I going to cover.

180

00:24:24.270 --> 00:24:36.450

Stephanie Bogan: How am I going to present that I want it right, no different than telling my story, I want to make sure it follows all great the proven practices, the things that i've learned, I want to rehearse it a few times feel good about it, then i'm going to launch my campaign.

181

00:24:38.700 --> 00:24:51.030

Stephanie Bogan: And then so that's time and then time in your calendar each week so as you're mapping next this quarter Clinton is that help inform you as to what you can do this quarter to put yourself in a position to succeed next year.

182

00:24:53.940 --> 00:24:56.790

Clinton Miller: yeah, I think, so I think I need to.

183

00:24:58.710 --> 00:25:07.290

Clinton Miller: spend some time thinking about what what you know the the lead into a conversation with a coi and the actual conversation, what I want to say.

184

00:25:11.850 --> 00:25:17.700

Clinton Miller: And maybe talk to some people about this talk with some people who have had some experience with that.

185

00:25:19.230 --> 00:25:20.880

Clinton Miller: That is actually lead to new clients.

186

00:25:21.630 --> 00:25:22.860

Clinton Miller: Exactly chapter.

187

00:25:23.910 --> 00:25:26.010

Stephanie Bogan: So that's what you'll notice is each of these.

188

00:25:27.240 --> 00:25:36.180

Stephanie Bogan: Working on its own, each of the sections in the playbook right, one that you see here is personal marketing ask you a series of questions to help you.

189

00:25:36.510 --> 00:25:47.490

Stephanie Bogan: kind of get clear on how am I going to do this, do I need to create a list do I do Do I need to schedule like how am I going to make this happen questions is what those are intended to lead you through.

190

00:25:47.880 --> 00:25:55.770

Stephanie Bogan: And then those those bullet points are really around what are the actions that you might not be taking hey I need to gather a list of names i'm going to need to build my coi list.

191

00:25:56.280 --> 00:26:07.560

Stephanie Bogan: This list should not be considered all perfect and all inclusive, like every possible strategy or idea cannot possibly be in the playbook or would literally be a book book.

192

00:26:07.830 --> 00:26:19.380

Stephanie Bogan: What it is, is a really good guideline to the kinds of questions and information that you should be thinking you'll start to see a pattern to it, how do I prepare, how do I schedule, what do I need to create.

193

00:26:19.860 --> 00:26:26.790

Stephanie Bogan: And it's usually going to be calendar you're going to need to calendar time to prepare for the project we call them project.

194

00:26:27.630 --> 00:26:40.410

Stephanie Bogan: Project prep and then to execute the project right so maybe Clinton calendars out right every Friday for a month to work on these things right, and then you know, two hours a week, and is scheduled to have those follow ups and lunch meetings next year.

195

00:26:40.800 --> 00:26:47.640

Stephanie Bogan: So the goal in forums, the vision informs the goals the goals and the outcomes inform the calendar.

196

00:26:48.090 --> 00:26:54.390

Stephanie Bogan: Right, you can let your client meetings your surges and everything else is left great to fill this time in with.

197

00:26:54.810 --> 00:27:00.750

Stephanie Bogan: So does that help you guys see how we go from like hey I want to double in the next three years to what do I need to accomplish.

198

00:27:01.260 --> 00:27:12.450

Stephanie Bogan: Clinton pick a particular strategy campaign right centers of influence, she chose his channel, in that sense, and then we went through some very simple questions to get to what's your playbook clin.

199

00:27:13.110 --> 00:27:16.560

Stephanie Bogan: button, do you have at least the start of the playbook that you feel like you can work with.

200

00:27:20.220 --> 00:27:26.850

Stephanie Bogan: Did that help you to go through it, for the rest of you, I know you'll have different objectives anyone else, want to go through one.

201

00:27:31.380 --> 00:27:35.040

Stephanie Bogan: who's hiding in the back, should we go to the back to to do.

202

00:27:36.270 --> 00:27:37.500

Stephanie Bogan: let's see.

203

00:27:40.950 --> 00:27:41.820

Stephanie Bogan: Should I pick on.

204

00:27:43.320 --> 00:27:44.370

Stephanie Bogan: let's see.

205

00:27:45.450 --> 00:27:46.440

Stephanie Bogan: peyton are you there.

206

00:27:51.480 --> 00:27:52.140

Stephanie Bogan: No.

207

00:27:54.420 --> 00:27:54.930

Stephanie Bogan: All right.

208

00:27:56.250 --> 00:27:57.210

Stephanie Bogan: Chris Hansen.

209

00:27:59.670 --> 00:28:00.270

Stephanie Bogan: How you doing.

210

00:28:01.590 --> 00:28:02.310

Chris Hansen: Good how are you.

211

00:28:02.550 --> 00:28:09.090

Stephanie Bogan: i'm good I do you have a growth goal that you want to share do you have that defined and broken out or do you want to work through it.

212

00:28:10.770 --> 00:28:16.320

Chris Hansen: um I do, but I honestly don't have it right in front of me.

213

00:28:19.380 --> 00:28:27.510

Chris Hansen: it's basically I believe it's i'm about to clients, a month two new clients, a month is our growth call alright.

214

00:28:28.020 --> 00:28:36.540

Stephanie Bogan: So this is a good example whether Chris has this broken out or not okay i've got a goal never know what do I don't know i've got 17 options, what do I do.

215

00:28:36.840 --> 00:28:43.950

Stephanie Bogan: So the next step is rate, aside from choosing your audience which, hopefully, you have rate the Foundation to do at this point.

216

00:28:44.400 --> 00:28:52.920

Stephanie Bogan: Is identify what channel you're going to pursue, which was the session that Michael did called choosing your channel for those of you that are in the marketing plan session.

217

00:28:53.250 --> 00:29:01.260

Stephanie Bogan: which breaks down each of the strategies in the playbook personal networking centers of influence, in particular the digital strategy so that everyone's.

218

00:29:01.530 --> 00:29:08.640

Stephanie Bogan: really aware and grounded in what's required to execute those and how you invest time and how long it takes So if you have not watched that lesson.

219

00:29:09.150 --> 00:29:18.690

Stephanie Bogan: And you're really looking for a strategy that would be the place that I would start would be choosing your channel and then bring any questions that you have to me and the tribe, so that we can.

220

00:29:19.050 --> 00:29:25.740

Stephanie Bogan: help get you direction because that's the goal over the course of this quarter, yes, I want you to focus on your move the needle priorities which we'll talk about.

221

00:29:26.040 --> 00:29:34.560

Stephanie Bogan: But I want you to do that and the invitation is to do that in the framework of what are my growth goals right that three year runway.

222

00:29:35.520 --> 00:29:43.230

Stephanie Bogan: And then, what, how is that translating into my goals for next year and then the playbook is how do I translate that into an actionable plan.

223

00:29:43.800 --> 00:29:50.610

Stephanie Bogan: That I can put in the calendar build campaigns around build content around.

224

00:29:51.180 --> 00:30:03.240

Stephanie Bogan: And then ultimately create calls to action around whether that's your offers are updating your sales funnel rates Louis could be as simple as redefining your discovery call all the way up to right building an online sales funnel.

225

00:30:03.720 --> 00:30:16.590

Stephanie Bogan: And then the fourth piece is right, just the commitment to follow through which is that time and budget and integrating your team where that makes in your vendors were that makes sense to make sure that you're applying those resources in a way that get you to the goal, you want.

226

00:30:18.510 --> 00:30:22.170

Stephanie Bogan: Alright, so Chris do you have insight into the channels that you want to pursue.

227

00:30:23.640 --> 00:30:28.020

Chris Hansen: Yes, our intention we've done very well with the just blogging.

228

00:30:28.500 --> 00:30:33.180

Chris Hansen: is fair, he kind of long form blogging and we have.

229

00:30:34.260 --> 00:30:37.560

Chris Hansen: Basically, been restructuring and a lot of our internal.

230

00:30:38.700 --> 00:30:53.310

Chris Hansen: processes, so we have not done that, but at this point we are we're ready to redress that so blogging our initial one is going to be start getting articles back out.

231

00:30:53.790 --> 00:31:02.580

Chris Hansen: on a regular basis, start putting them through all the different channels and i'm actually looking for my notes, because I wrote this all down during the.

232

00:31:05.550 --> 00:31:14.250

Chris Hansen: During the session we went through basically start getting those into all the channels and then, once we've got that on autopilot.

233

00:31:14.700 --> 00:31:30.870

Chris Hansen: start looking for, we should probably start buying some advertising on Facebook in trying to locate who might help us do that so Those are our and I think that's generally about all we're going to be able to handle for the year.

234

00:31:31.260 --> 00:31:41.520

Stephanie Bogan: So I got two things in there, that I think both very relevant and important not just to Chris but all of us across all likes all we'll talk about your context, but I want everyone to catch them.

235

00:31:41.970 --> 00:31:57.840

Stephanie Bogan: One did you all catch the very important inflection point where Chris paused and said I think we're at a place now to spend time on this we've been working on the right will call infrastructure OPS what I call protocol all of that productivity right.

236

00:31:59.190 --> 00:32:05.880

Stephanie Bogan: Growth goals can be to nail productivity, because without that.

237

00:32:06.330 --> 00:32:12.750

Stephanie Bogan: it's all just harder and more effortful and you lose so much off the back end so I want to give you permission.

238

00:32:13.050 --> 00:32:24.090

Stephanie Bogan: Chris in this case, or any other to say in any given quarter hey the best way for us to get ahead is to slow down and speed up by.

239

00:32:24.600 --> 00:32:32.730

Stephanie Bogan: rate speeding up our operational efficiency speeding up our clarity as partners about what we focus on rate our ability to stick to that are.

240

00:32:33.060 --> 00:32:42.090

Stephanie Bogan: digging into the content that we need to dig into to actually launch a digital strategy in a way that we feel good about instead of winging it right, so those are the.

241

00:32:42.540 --> 00:32:51.900

Stephanie Bogan: Like that's the invitation is to not look at this or hear me say what are your growth goals like growth goals should always be created in the context of.

242

00:32:52.260 --> 00:33:01.500

Stephanie Bogan: overall success and satisfaction, where is the business, what does it need is it positioned to grow if it is if it's not I need to deal with that.

243

00:33:02.970 --> 00:33:09.240

Stephanie Bogan: too, if it is right, how do I make best use of everyone's time and energy to do that, which is why we then build the playbooks.

244

00:33:09.840 --> 00:33:15.240

Stephanie Bogan: So one I think that's important anyone here have a growth goal that does not include.

245

00:33:15.630 --> 00:33:25.170

Stephanie Bogan: External growth that will happen, obviously, but anyone focused more on internal productivity and getting those changes Jill I know tiffany and Jared are.

246

00:33:25.680 --> 00:33:36.000

Stephanie Bogan: Which is hard when you're a fast growing awesome firm but that's where they absolutely are right now anyone else brave enough to admit I have to scroll through the screens yet Aaron Aaron like this yeah.

247

00:33:37.380 --> 00:33:45.420

Stephanie Bogan: So let's the reservation really if everyone can you imagine if you took one year, and this is obviously revenue rate assuming you could do it.

248

00:33:46.170 --> 00:33:58.470

Stephanie Bogan: And you didn't focus on growth at all for one year, you just focused on running an excellent practice getting all the efficiency out creating a great experience for you in the clients and the team.

249

00:33:58.800 --> 00:34:12.690

Stephanie Bogan: really getting the sand, out of the gear so that you're not grinding out everything getting surges really well oiled and nailed so because you're not trying to grow in the middle of all of that i'm not saying that you do that at 100% I just want you to imagine.

250

00:34:13.620 --> 00:34:27.750

Stephanie Bogan: What kind of runway that might clear for you and what impact that might have on the business, as you will evaluate how you want to grow, can we just put that right in air quotes how you want to grow next year.

251

00:34:28.320 --> 00:34:36.960

Stephanie Bogan: In the way that best serves your now experience in your long term goals, so some of you raise revenue isn't now experience totally get that.

252

00:34:37.560 --> 00:34:43.050

Stephanie Bogan: Right so it's about how do you balance, what do you have to focus on to not slow it down.

253

00:34:43.320 --> 00:34:47.970

Stephanie Bogan: and put too many sand in the gears like Okay, I can do my own staff work for a while.

254

00:34:48.180 --> 00:35:00.330

Stephanie Bogan: But the way i'm going to not let that completely distracted me is to do that two hours a day things stephanie said, even though it sounds crazy and just see if I can focus my admin time they're like I want you all to get really clear about the nature of that growth.

255

00:35:01.680 --> 00:35:03.000

Stephanie Bogan: The second thing was.

256

00:35:04.230 --> 00:35:13.860

Stephanie Bogan: Really, about what you talked about the blogging and choosing that channel, did you hear how it went from I made a choice same thing we just went through a minute ago.

257

00:35:14.310 --> 00:35:24.960

Stephanie Bogan: front with Clinton like how it choice very quickly ripple down into just a series of questions that lead to some very practical oh we're going to start blogging again that really worked we're going to need to make some time for that.

258

00:35:25.200 --> 00:35:28.440

Stephanie Bogan: So we're going to do the articles, and I think that's really all we're going to have time for.

259

00:35:29.430 --> 00:35:38.640

Stephanie Bogan: that's it like we really have this tendency to make marketing because it's what drives growth is big complicated scary thing.

260

00:35:39.090 --> 00:35:51.210

Stephanie Bogan: And for those of you in larger firms right that have moving parts and many people right, it can be more complex, it does not need to be more complicated that something that we bring to the equation.

261

00:35:51.570 --> 00:35:59.760

Stephanie Bogan: And for those of you in smaller right solos or solos with service advisors, where there's still a lot less of that workflow to manage in terms of the size of the team.

262

00:36:00.150 --> 00:36:14.370

Stephanie Bogan: it's really about the channels that you can concentrate on to leverage those resources to the utmost right Adam does Center of influence networking has these right very awesome clients have accountants and write them.

263

00:36:14.790 --> 00:36:28.260

Stephanie Bogan: But but it's not the core strategy right it's a satellite strategy and then each year he'll define how much relevance influence and impact and thus time attention and energy that will get in his plan.

264

00:36:28.650 --> 00:36:31.650

Stephanie Bogan: And once the, you know as things get to a certain point he might be like.

265

00:36:32.010 --> 00:36:42.120

Stephanie Bogan: You know this thing's on autopilot i'm going to go over here and really work read the top of the food chain with these you know private equity opportunities and maybe he just likes to do that for a year.

266

00:36:42.720 --> 00:36:52.110

Stephanie Bogan: Maybe he never decides to do that, but he's got a basic seo I campaign for when those introductions are made and to maintain communication and take that team approach that you talk about.

267

00:36:53.820 --> 00:37:00.780

Stephanie Bogan: So does that help you guys get clear on what's the growth goal for next year, Dan suitor do you have your growth goals for next year.

268

00:37:07.260 --> 00:37:09.600

Dan Suiter: i'm going to select this at something i'm reviewing after search.

269

00:37:10.020 --> 00:37:13.920

Stephanie Bogan: Okay, and that's totally Okay, because what's his priority right now.

270

00:37:15.240 --> 00:37:24.180

Stephanie Bogan: search, so we don't have to go to retreat and feel like oh my God, I have to come back and solid like Dan knows how to do it he's been around he's okay i'm going to do searches that's my focus.

271

00:37:24.720 --> 00:37:32.250

Stephanie Bogan: Then we'll come back to it, Dan that's the time to write get clear on the growth strategy and how you want to use the time in between searches next year.

272

00:37:33.450 --> 00:37:45.060

Stephanie Bogan: Right and you have permission to do that the goal is to make sure that by the time the year comes to a close, you have clarity on how you intend to drive growth across the firm next year, however, you define it.

273

00:37:46.350 --> 00:37:51.480

Stephanie Bogan: Great does anyone else, want to jump into the get clarity about your growth goals.

274

00:37:54.300 --> 00:37:58.860

Stephanie Bogan: now willing volunteers today all right Mike Mr I see you tapping away over there.

275

00:38:01.350 --> 00:38:08.910

Mike Metzger: yeah I actually last week went through and i've done my whole wrote all over my marketing playbook, so I do have.

276

00:38:09.960 --> 00:38:13.770

Mike Metzger: Some golden action items that I want to accomplish for 2020.

277

00:38:15.840 --> 00:38:20.310

Stephanie Bogan: Okay, so you've got some clarity around that I saw can you hold that up for everybody, just so they can see.

278

00:38:21.300 --> 00:38:32.370

Stephanie Bogan: Right does that look perfect and like oh my God like no right it's just that's what that's the start, that is, the magic of whereas you just put something on that page, then you refine you tweak you execute.

279

00:38:32.760 --> 00:38:41.010

Stephanie Bogan: You mess up a little bit you execute again so it's really about just putting something on the page and using that as the launching pad.

280

00:38:42.270 --> 00:38:58.350

Stephanie Bogan: Alright, so everyone should at this point, have clarity around their growth goal, I want you to all very quickly in the chat drop me one takeaway that you got from that conversation, and if you didn't get one, please let me know and i'll try to up my game, as we move into the next segment.

281

00:39:05.730 --> 00:39:10.080

Stephanie Bogan: don't worry down i'm not gonna make it go away slow down to speed up to that's a great one.

282

00:39:11.370 --> 00:39:12.330

Stephanie Bogan: Be intentional.

283

00:39:14.280 --> 00:39:24.180

Stephanie Bogan: it's not in your calendar is exactly if you're nervous I forgot about it, I love that you did that hey it's got to be worth of swag Tom that's awesome.

284

00:39:24.810 --> 00:39:32.790

Stephanie Bogan: delegate more I got to use that on Twitter Leona somebody catch that right it's not in your calendar is oh I forgot, you can take the year off.

285

00:39:33.150 --> 00:39:39.840

Stephanie Bogan: trying, yes I call it slowing down to speed up if you've ever coached with me for any period of time you've heard me say it it's really annoying also very true.

286

00:39:41.760 --> 00:39:49.680

Stephanie Bogan: Okay, so some good stuff here, those are the takeaways that I want you to absorb and then ask yourself how you're going to apply them as you move forward.

287

00:39:50.010 --> 00:40:00.180

Stephanie Bogan: Designing your growth strategy for next year, whatever it may be, this is what we sort of very quickly went through define the goals identify the audience choose the Channel.

288

00:40:01.620 --> 00:40:07.440

Stephanie Bogan: All the screens, I came to my screen create your map right just the most important thing is.

289

00:40:07.800 --> 00:40:19.950

Stephanie Bogan: Whether you're driving big growth next year or not, is to go through the exercise of filling out that worksheet so that you very much like we did with Clinton turn that ambiguous sort of general ish idea in the brain into.

290

00:40:20.280 --> 00:40:25.410

Stephanie Bogan: Something concrete, so that you can get to some version of step five, which is to lunch and manage that.

291

00:40:26.940 --> 00:40:31.590

Stephanie Bogan: So this is the documents we just went through all of this, so we don't need to do it again.

292

00:40:32.610 --> 00:40:44.790

Stephanie Bogan: And, starting from ground zero, these are the sections that are in there, as you go through that playbook so feel free to reference those and then the goal is to whether it's in this form, or not I.

293

00:40:45.360 --> 00:40:53.040

Stephanie Bogan: like this, just as a map, so that you can very quickly in one page see how those campaigns play out right so Clinton could go in.

294

00:40:53.430 --> 00:41:00.870

Stephanie Bogan: And each week can be like coffee chat breakfast meeting email Ray you know email connections, whatever those specific activities are.

295

00:41:01.740 --> 00:41:08.370

Stephanie Bogan: We have an annual calendar template where you can map out, obviously, the whole year, so you know where rate, this schedule uploads.

296

00:41:08.670 --> 00:41:16.740

Stephanie Bogan: And then the beauty of this plan is once it's built out and you've got those lists or people tagged your team, should be able to help fill it in.

297

00:41:17.130 --> 00:41:24.480

Stephanie Bogan: And what I mean by that is if Jill is sitting in her office on a Wednesday I literally had one of my private clients asked me this it was really funny.

298

00:41:25.020 --> 00:41:32.070

Stephanie Bogan: What if what if what if I delegate so much that i'm sitting there and there's nothing to do and I was like that's never gonna happen, but OK.

299

00:41:32.640 --> 00:41:40.170

Stephanie Bogan: And then the answer was will you have a plan B list and a plan B list if it's Adam is sitting his office and a client meeting cancelled during surge.

300

00:41:40.560 --> 00:41:48.270

Stephanie Bogan: He has a policy I don't write up the policy is he gets to take that our debrief go Adam his team gets access to him.

301

00:41:48.750 --> 00:41:57.840

Stephanie Bogan: or he's going to use that right for something else client service or follow up related to surge or he might just say, I have a list of people that I always just want to call if i've got an hour.

302

00:41:58.590 --> 00:42:07.530

Stephanie Bogan: So if you're in marketing land where growth land or you've got time blocked in your calendar for marketing, you should have someone helping you set that time up.

303

00:42:08.070 --> 00:42:10.830

Stephanie Bogan: If they know right if Clinton knows that he wants to have.

304

00:42:11.160 --> 00:42:18.240

Stephanie Bogan: A campaign that includes a coffee chat at some point when when that campaign is built out at some point he can have an assistant reach out and.

305

00:42:18.510 --> 00:42:23.670

Stephanie Bogan: He can write a nice email and say hey Jamie will be reaching out to schedule a time for us to get together for coffee.

306

00:42:24.510 --> 00:42:34.140

Stephanie Bogan: And Jane can have that email on that list ready and great Jane Jack Sue whoever it is can send out those emails consistently until somebody fills that slot.

307

00:42:34.590 --> 00:42:41.370

Stephanie Bogan: And if the slot slot doesn't get filled one week for Clinton or Adam then we've got that list of people in those contacts that we know we can spend our time.

308

00:42:42.090 --> 00:42:49.920

Stephanie Bogan: So you should always have a plan B, for how to use marketing time that doesn't usually happen, but if you find yourself in that situation.

309

00:42:50.430 --> 00:43:00.360

Stephanie Bogan: You can take these lists and campaigns and make sure that you've always got someone queuing up here's a list of 10 people, you can always call here the 10 CEOs I should be reaching out to.

310

00:43:00.720 --> 00:43:04.290

Stephanie Bogan: If i've got or 10 top 10 clients I should be connecting with about something.

311

00:43:04.980 --> 00:43:13.740

Stephanie Bogan: So the schedule gives you and your calendar and your team just insight into what you want to do on a schedule for marketing.

312

00:43:14.220 --> 00:43:26.370

Stephanie Bogan: And then those things that are not recurring like building content right Adams got time in his calendar to record those podcasts but right when you're doing things for the first time there's planning and extra planning and prep that goes on to them.

313

00:43:27.660 --> 00:43:41.580

Stephanie Bogan: So the outcome of this is a simple one page marketing plan that gives you guidance for how you structure your marketing schedule next year, because as Tom said if it's not in the calendar it's a wait I forgot it didn't happen.

314

00:43:42.600 --> 00:43:44.250

Stephanie Bogan: Okay, you guys ready for a breakout.

315

00:43:45.570 --> 00:43:46.740  
Stephanie Bogan: All right, Leona.

316  
00:43:48.600 --> 00:43:49.230  
Stephanie Bogan: You there.

317  
00:43:50.520 --> 00:43:50.880  
Limitless Adviser: here.

318  
00:43:51.270 --> 00:43:56.820  
Stephanie Bogan: All right, you guys want to hit so we're going to break you out into groups these groups of four or five route if i'm recalling correctly.

319  
00:43:57.090 --> 00:44:00.930  
Limitless Adviser: Correct yeah they're random automatically assigned groups.

320  
00:44:01.050 --> 00:44:08.610  
Stephanie Bogan: Okay, so we're going to break you out into groups of four it's automatic and random is Leona said, and I want you to we're going to do another breakout.

321  
00:44:08.910 --> 00:44:13.200  
Stephanie Bogan: So we're not gonna spend too much time here, but I want to get you each just sharing.

322  
00:44:14.040 --> 00:44:19.860  
Stephanie Bogan: What it says on the screen, which is what is your growth goal for 2022 what channels are you focused on.

323  
00:44:20.280 --> 00:44:27.870  
Stephanie Bogan: hey i'm focusing on podcasts or my blog what's the big opportunity right as you look at the landscape what's the biggest opportunity for you and or.

324  
00:44:28.110 --> 00:44:39.360  
Stephanie Bogan: what's your biggest resistance point so pick one or two of those that are the most relevant to you share those in a group and we'll give you let's do three minutes each to 12 minutes, can we do that liana.

325  
00:44:39.930 --> 00:44:40.260  
Limitless Adviser: let's get.

326  
00:44:40.830 --> 00:44:52.680  
Stephanie Bogan: Right so everybody check your clocks is 1148 so exactly 12 mountain time we are going to yank you out of those rooms and reconvene you here are your marks get set go.

327  
00:44:53.910 --> 00:44:54.330  
Limitless Adviser: All right.

328  
00:44:55.140 --> 00:44:57.210  
Stephanie Bogan: This is the awkward pause while she hits the button so.

329  
00:45:00.090 --> 00:45:04.680  
Stephanie Bogan: i've made jokes queued up for this Adam you're funny see something help me out here.

330  
00:45:07.620 --> 00:45:12.480  
Adam Cmejla, CFP®: Oh, this is where I just get to sit in the background, yet step I don't really have to i'm not the spotlight.

331  
00:45:15.540 --> 00:45:16.650  
Adam Cmejla, CFP®: i'm just like everybody else.

332  
00:45:16.650 --> 00:45:17.160  
Adam Cmejla, CFP®: Today right.

333  
00:45:18.810 --> 00:45:19.800  
Adam Cmejla, CFP®: Like on you.

334  
00:45:20.190 --> 00:45:21.090  
Stephanie Bogan: I cannot be trouble.

335  
00:45:22.500 --> 00:45:23.100  
Stephanie Bogan: All right.

336  
00:45:26.310 --> 00:45:29.070  
Stephanie Bogan: Gary done jocelyn Chris we're going to send you.

337  
00:45:29.610 --> 00:45:32.460  
Limitless Adviser: Are they going to stay in here yeah just make sure you guys join.

338  
00:45:33.720 --> 00:45:34.710  
Limitless Adviser: When you get the prompt.

339  
00:45:42.540 --> 00:45:44.190  
Stephanie Bogan: Are they going to a different breakout room.

340  
00:45:45.600 --> 00:45:48.930  
Limitless Adviser: nope they're assigned to one so on your site your Room one.

341  
00:45:49.350 --> 00:45:50.220  
Stephanie Bogan: Is this room one.

342  
00:45:51.390 --> 00:45:52.620  
Limitless Adviser: know there he goes.

343  
00:45:54.270 --> 00:45:57.780  
Limitless Adviser: Chris and Robert still need to join room few right.

344

00:45:57.870 --> 00:45:59.670

Stephanie Bogan: Oh, you have to accept it, I think yeah.

345

00:46:00.120 --> 00:46:15.450

Stephanie Bogan: Correct right, so they may have just turned on there, some of them may have just turned it on and be stepped away from it so okay all right i'm gonna go get a glass of water, since I have a 10 minute break and if any of these lovely people come back put them under.

346

00:46:16.110 --> 00:46:16.500

A bit.

347

00:48:10.590 --> 00:48:13.350

Stephanie Bogan: What does it record during this particular recording the call.

348

00:48:15.930 --> 00:48:16.830

Stephanie Bogan: Here muted sorry.

349

00:48:17.130 --> 00:48:18.570

Limitless Adviser: It just records this main room.

350

00:48:19.410 --> 00:48:19.740

Oh.

351

00:48:21.720 --> 00:48:22.260

Stephanie Bogan: So we should.

352

00:48:22.710 --> 00:48:23.370

Probably.

353

00:48:24.840 --> 00:48:27.150

Stephanie Bogan: We should probably just have follow edit that part out.

354

00:48:27.480 --> 00:48:30.480

Stephanie Bogan: yeah, we should think about that for next year, as we think about the.

355

00:48:31.680 --> 00:48:32.430

Stephanie Bogan: The breakouts.

356

00:48:33.930 --> 00:48:34.230

Limitless Adviser: Okay.

357

00:48:35.730 --> 00:48:38.520

Stephanie Bogan: either to just turn the screen black and go away for 10 minutes.

358

00:48:39.900 --> 00:48:45.210

Stephanie Bogan: If you're watching my brother wants to watch the recording of this or we can just edit it out.

359

00:48:48.690 --> 00:48:50.760

Stephanie Bogan: And entertain might be able to do that if we just.

360

00:48:52.020 --> 00:48:52.620

Mark them.

361

00:48:55.980 --> 00:49:13.980

Limitless Adviser: 1148.

362

00:49:20.490 --> 00:49:22.860

Stephanie Bogan: inviting me to join the room, but i'm not going to be.

363

00:53:23.280 --> 00:53:24.210

Stephanie Bogan: couple of minutes.

364

00:56:23.850 --> 00:56:27.840

Stephanie Bogan: Right liana where are we on time one minute.

365

00:56:28.710 --> 00:56:31.320

Limitless Adviser: One minute yep I sent the broadcast and let them know.

366

00:56:49.320 --> 00:56:54.120

Limitless Adviser: Right i'm on the hour here on my clock do you want me to this room ready to come back.

367

00:56:54.360 --> 00:56:55.020

Stephanie Bogan: Yet let's do it.

368

00:57:01.980 --> 00:57:06.030

Limitless Adviser: 22nd.

369

00:57:12.510 --> 00:57:18.540

Stephanie Bogan: Ryan, I was going to ask you what your growth goals were next year, but I thought that might just stir up like a whole big conversation.

370

00:57:20.370 --> 00:57:21.120

Ryan A. Smith, CFP®: This one.

371

00:57:21.630 --> 00:57:22.230

Yes.

372

00:57:23.340 --> 00:57:29.460

Ryan A. Smith, CFP®: i'm micros goals are, I want to put on, I want to replace that the \$8 million net that.

373

00:57:30.540 --> 00:57:32.580

Ryan A. Smith, CFP®: That client didn't fit and.

374

00:57:35.310 --> 00:57:36.570

Ryan A. Smith, CFP®: I want to cut.

375

00:57:37.710 --> 00:57:40.050

Ryan A. Smith, CFP®: Just to households do it so.

376

00:57:42.300 --> 00:57:43.980

Ryan A. Smith, CFP®: Right that's my that's my number.

377

00:57:47.010 --> 00:57:53.190

Stephanie Bogan: Right and then it will be, do you know what growth is that the growth goal, or is that to create space for growth.

378

00:57:54.120 --> 00:57:55.560

Ryan A. Smith, CFP®: To cutting the households.

379

00:57:55.920 --> 00:57:56.340

Yes.

380

00:57:57.450 --> 00:58:00.750

Ryan A. Smith, CFP®: That is to create more space, I think it's to create some longer.

381

00:58:01.980 --> 00:58:02.490

Ryan A. Smith, CFP®: So.

382

00:58:03.600 --> 00:58:11.280

Ryan A. Smith, CFP®: The channels that i'm using i'm still I mean started i've had hunting to dance for trying to i'm currently in search so as soon as I get out of that.

383

00:58:12.630 --> 00:58:19.470

Ryan A. Smith, CFP®: With the channels right now it's going to be CEOs and i'm looking at some inbound marketing for my website so optimizing that but.

384

00:58:21.660 --> 00:58:31.170

Ryan A. Smith, CFP®: Overall, I want to have i'm still wanting to have that hundred and \$25 million practice will cross you know anywhere from 110 to 95 points.

385

00:58:31.500 --> 00:58:34.290

Stephanie Bogan: Okay, so you've got the clarity of the outcome that you want to create.

386

00:58:34.650 --> 00:58:35.580

Stephanie Bogan: that's what.

387

00:58:35.700 --> 00:58:41.910

Stephanie Bogan: I want to help that's what I hope you guys each guys you shared a little bit is, what are the growth goals, what are you going to focus on.

388

00:58:42.330 --> 00:58:49.140

Stephanie Bogan: What are the things that can really be right, some can really be those tailwinds that push you forward and what are the things that are going to potentially be.

389

00:58:49.560 --> 00:58:58.320

Stephanie Bogan: headwinds that create resistance, whether they're right markets are shifting niches or having to clean things up or staffing, you know, whatever those might be it's important that we be aware of them.

390

00:58:58.770 --> 00:59:06.270

Stephanie Bogan: And the reason I wanted to do that here is because we're really now i'm going to lead into this discussion of just a really quick review of the limitless.

391

00:59:06.630 --> 00:59:14.700

Stephanie Bogan: What I call the launch process which is just our version of strategic planning and the not plan implementation so it's like a cross between vision and goals.

392

00:59:15.090 --> 00:59:23.400

Stephanie Bogan: And if you're familiar with traction or models like that, and then the project management piece in one integrated system.

393

00:59:23.730 --> 00:59:38.430

Stephanie Bogan: You were as always welcome to rip off deploy deploy and then refine as it works for you the model that you apply in your firm, no matter what the model cocktail napkins literally would work, I say that a lot but it's true.

394

00:59:38.910 --> 00:59:49.710

Stephanie Bogan: Is it's because any model needs to create that clarity of what you're doing and why you're doing it right and you'll notice that the questions and the workbook are really focused on helping facilitate that.

395

00:59:50.280 --> 00:59:59.280

Stephanie Bogan: That your vision your mission your values those initial sets of goals transparency or those views that you have of the plans and the progress like, how do we turn that clarity.

396

00:59:59.610 --> 01:00:09.240

Stephanie Bogan: into a transparent plan that we execute around in the third leg of that stool most important is the accountability piece, because when we are accountable.

397

01:00:09.690 --> 01:00:18.390

Stephanie Bogan: We will figure out everything else right is that not true that when you when you really want something and you're really committed to it, you will find a way where you will make one.

398

01:00:18.780 --> 01:00:23.670

Stephanie Bogan: So accountability is really creating ownership results of the results for your team.

399

01:00:24.180 --> 01:00:32.460

Stephanie Bogan: For yourself and, ultimately, for any breakdowns that happens, so that you can remedy those breakdowns and right

launch through to your next set of goals.

400

01:00:32.880 --> 01:00:45.600

Stephanie Bogan: So we've talked about this, there is of course the core lesson on it, but I really want to dive into the piece this quarter of the quarterly Business Review, which is once you've got that that roadmap for the year that one page business plan.

401

01:00:46.230 --> 01:00:55.290

Stephanie Bogan: tool and exercise that we took you through at the beginning of the year, which you should be reviewing again towards the end of this year, will of course do it again with limitless 2022.

402

01:00:55.740 --> 01:01:05.940

Stephanie Bogan: But this is each quarter, you really do want to stop and reflect this is that pause and reflection point that you heard us talking through earlier of where Am I.

403

01:01:06.930 --> 01:01:17.760

Stephanie Bogan: Where Am I want to go right, just like a client, am I on track what changes do I need to make have the goals change it is literally what you do for clients, it is.

404

01:01:18.150 --> 01:01:27.540

Stephanie Bogan: A client review on your business right, if you look at the one page plan model it it's pretty closely mirrors the if we look at some of the agendas.

405

01:01:28.050 --> 01:01:37.530

Stephanie Bogan: Right, where are we going does that sound a little bit like a statement of purpose it was not intentional, by the way, but when things have clarity, transparency and accountability, will show up in the model.

406

01:01:38.160 --> 01:01:48.360

Stephanie Bogan: So it's really when we start if you are on your own this might be an afternoon that you sit down, it might be something you do with your spouse just to have another party at the table and get some outside for sentence.

407

01:01:48.510 --> 01:01:59.580

Stephanie Bogan: Opinions because you're probably talking about this stuff anyway, if you have a team, you want to have a meeting right it two hours to a half a day or a day you know, we need to do a day for a quarterly meeting.

408

01:02:00.120 --> 01:02:09.420

Stephanie Bogan: but also for larger firm, sometimes it absolutely is the case so it's about having an agenda that really reflects where are we right now, relative to where we're going.

409

01:02:10.350 --> 01:02:14.310

Stephanie Bogan: And then what's it going to take to get there is always the power question.

410

01:02:14.850 --> 01:02:23.160

Stephanie Bogan: what's it going to take for people what's it going to take for process what's it going to take with our productivity what's it going to take with our pricing what's it going to take with our client base so i'm going to have to.

411

01:02:23.490 --> 01:02:35.580

Stephanie Bogan: replace that \$8 million and shed 15 right non ideal clients, so that I can create space to write to market for the clients, that I do want to attract it really that I can do my best work with.

412

01:02:35.970 --> 01:02:41.850

Stephanie Bogan: Right and then you can you guys have seen you, you can build a plan around that pretty readily when you have that clarity.

413

01:02:42.900 --> 01:02:51.870

Stephanie Bogan: So if you're having a longer meeting right take a lunch most important is that everyone be involved, that will be invested.

414

01:02:53.040 --> 01:03:02.790

Stephanie Bogan: So if you set up a quarterly Business Review and you do it with yourself and then you go to the team and you're like hey here's what works like it's not the same as getting their involvement involvement equals investment.

415

01:03:03.240 --> 01:03:09.720

Stephanie Bogan: So we'll talk about this in the in the construct of now what we want to do is look at right where where where we going.

416

01:03:10.110 --> 01:03:13.890

Stephanie Bogan: Where are we now in relationship to that what work this quarter what didn't.

417

01:03:14.340 --> 01:03:20.760

Stephanie Bogan: And then, and all the details of these meetings and examples are and again the lesson I want to just quickly take you guys through it.

418

01:03:21.120 --> 01:03:28.260

Stephanie Bogan: what's it going to take to get there and then what's standing in our way what are those resistance points and then your next steps and action items.

419

01:03:28.560 --> 01:03:35.760

Stephanie Bogan: So when you have if you were in the project management call we did people's product people project and priorities.

420

01:03:36.150 --> 01:03:42.270

Stephanie Bogan: you're going to have or should have in between these quarterly businesses review quarterly business reviews.

421

01:03:42.690 --> 01:03:50.190

Stephanie Bogan: Those weekly or bi weekly or monthly meetings, depending on your size and situation where you're reviewing those projects, separate from.

422

01:03:50.640 --> 01:03:56.520

Stephanie Bogan: or as a part of those run the shop meetings but as separate agenda items right like hey where are we i've we had our.

423

01:03:56.910 --> 01:04:07.800

Stephanie Bogan: weekly huddle this morning and we went through the key priorities where is everybody who needs what everybody clear on their top three priorities for the week yes game plan 45 minutes done.

424

01:04:08.880 --> 01:04:16.770

Stephanie Bogan: Now, obviously we didn't start there right because we had over the years and new team new people came in covert change rate, so we had to go back.

425

01:04:17.340 --> 01:04:24.900

Stephanie Bogan: and say what is our strategic plan what's our quarterly priorities process right this business review and then, how do we refine.

426

01:04:25.260 --> 01:04:34.860

Stephanie Bogan: What happens in between the quarter to make sure that we've got that clarity, transparency and accountability along the way, so if you work in the Managing people projects and priorities.

427

01:04:35.220 --> 01:04:43.020

Stephanie Bogan: Call I think that was one of the tribe talks that is in the library and it's a it's a good watch in terms of how to use some of that technology to help with that.

428

01:04:44.340 --> 01:04:56.010

Stephanie Bogan: Right any questions around structuring a quarterly review to assess your progress involve your team to some extent depending again on your size or situation so that you can then set.

429

01:04:56.580 --> 01:04:59.640

Stephanie Bogan: The track for the next quarter is everybody on board with that concept.

430

01:05:00.480 --> 01:05:10.710

Stephanie Bogan: thumbs up pads okay great So this is the point around that you can do it a little bit earlier but, again, we got through growth retreat and that tends to have an influence on Q4 in the following year.

431

01:05:11.160 --> 01:05:24.780

Stephanie Bogan: Of really going through that process here's a template that is in the example great vision and goals review your business situation your practice performance your launch plan right that's the quarterly projects that you're working on.

432

01:05:25.230 --> 01:05:32.130

Stephanie Bogan: And, as always, next steps and action items and in the ideal a team event of some sort if you can, if you're in a position to do that.

433

01:05:32.670 --> 01:05:40.320

Stephanie Bogan: coven obviously dependent depending on your situation and the point is it's no different than what you're doing the mastermind groups.

434

01:05:40.680 --> 01:05:49.950

Stephanie Bogan: What we're doing with you over the course of the program which is making sure that your compass needle is always tuned to north, whatever that is.

435

01:05:50.460 --> 01:06:00.570

Stephanie Bogan: And that you have only a quarter ideally on a track to run on with the ongoing meetings, but you have a quarter to focus engage.

436

01:06:01.530 --> 01:06:07.440

Stephanie Bogan: Finish you're not going to hit everything every time, but if you can hit 80% you're going to be in a really good spot.

437

01:06:07.800 --> 01:06:20.790

Stephanie Bogan: Stop again reassess and do that and that's a business discipline and routine that will serve you well it's the same foundation that your client relationships are built on right, and those are very similar in that it's about.

438

01:06:21.630 --> 01:06:33.180

Stephanie Bogan: Taking a path, following a process to get to a specific place and constantly adjusting in relationship to changing circumstances over time that's what the quarterly businesses, it is.

439

01:06:33.810 --> 01:06:41.850

Stephanie Bogan: it's the isn't are the tongue of my mouth of the tongue away shoes moving in the same direction moment and that's really important for you and for your teams.

440

01:06:42.120 --> 01:06:54.990

Stephanie Bogan: If that's the issue if you're not getting progress at the team level and you're getting stuck there you're going to want to use that managing people process, and these quarterly reviews to really re shift and re engage people in a way that creates the momentum that you want.

441

01:06:57.090 --> 01:07:07.920

Stephanie Bogan: And then we talked about this in the the project management call if all else fails, you can do this in this spreadsheet it's not my recommendation and 2021, but if you are literally.

442

01:07:08.400 --> 01:07:20.520

Stephanie Bogan: unable to do anything else you can put your projects into a spreadsheet complete your clients new spreadsheet and review them rate on a weekly basis, so your goal each quarter is a set the priorities for the next quarter.

443

01:07:21.750 --> 01:07:26.610

Stephanie Bogan: you'll do that with the weekly team meetings is how we tend to manage those projects as we've talked about.

444

01:07:27.570 --> 01:07:39.000

Stephanie Bogan: You can use the Managing performance benchmark for those of you who are using this you definitely want to review this on a quarterly basis for those of you who aren't I recommend that you review it on a quarterly basis.

445

01:07:39.450 --> 01:07:50.190

Stephanie Bogan: And it's where you put in your key practice data relative to your goals three year goals and then the spreadsheet will sort of tell you how you're performing against your goals and.

446

01:07:50.580 --> 01:07:53.850

Stephanie Bogan: The most appropriate benchmark in terms of the size of firm.

447

01:07:54.450 --> 01:08:03.510

Stephanie Bogan: So I think the benchmark probably needs to be up I think it's in the queue to update it next year right so that I think the last 18 months of growth are probably not reflected there.

448

01:08:04.110 --> 01:08:11.130

Stephanie Bogan: But it's much more about your baseline relic your relationship to your goal, so it will give you.

449

01:08:11.400 --> 01:08:17.250

Stephanie Bogan: Green yellow red indicators, if your revenue per client is low, relative to your goal that's going to be red.

450

01:08:17.520 --> 01:08:23.850

Stephanie Bogan: so that you know ding ding ding rate, this is an area we need to pay attention to right it's time to look at our pricing our surface structure.

451

01:08:24.150 --> 01:08:29.610

Stephanie Bogan: So this is a really powerful tool because information tells a story and that story tells you.

452

01:08:29.880 --> 01:08:39.480

Stephanie Bogan: Whether your strategy is working or not working, and it directs you in sort of direction to the steps that you can take to start to move the needle in the ways that you want to get the results that you want.

453

01:08:40.260 --> 01:08:49.350

Stephanie Bogan: When you look at it quarter over quarter, if you say that you want to double your revenue per client and you keep taking clients under the minimum what happens to your average revenue per client.

454

01:08:50.910 --> 01:08:56.790

Stephanie Bogan: It goes down so we're trained to believe that feels good like ooh I got a client go me.

455

01:08:57.300 --> 01:09:03.780

Stephanie Bogan: But we're retraining our brain to focus on a new and better bogey because, when the benchmark goes down.

456

01:09:04.260 --> 01:09:14.940

Stephanie Bogan: relative to your goal, suddenly, you have a direct line of sight between the choice that you made and the way that it compromised your performance in a way that's tangible that you can see, and go.

457

01:09:15.600 --> 01:09:25.350

Stephanie Bogan: God that probably felt, but in the moment but I gotta stop doing that using numbers are great my revenue is going up, but my profit per client or my revenue per client is going down, and that is not the goal.

458

01:09:25.890 --> 01:09:34.260

Stephanie Bogan: And so those that's the kind of awareness and dashboard thing that you want to do to keep your eyes on the prize and hold yourself really accountable.

459

01:09:34.620 --> 01:09:39.030

Stephanie Bogan: For the choices that you're making and the consequences that they're creating good or bad.

460

01:09:39.840 --> 01:09:47.490

Stephanie Bogan: Right, the the spreadsheet will not lie to you, it will tell you where those pain points are really pinching on your performance.

461

01:09:48.180 --> 01:09:57.630

Stephanie Bogan: So if you haven't done that I recommend it if you guys want to do a tribe talk on it at some point, let us know, and we can certainly do that as well, I think we've got an hour long lesson recorded on it.

462

01:09:58.350 --> 01:10:06.480

Stephanie Bogan: And where you should ultimately end up this quarter and i'm going to give you guys some minute to break out and focus on just how you want to focus this quarter.

463

01:10:07.110 --> 01:10:16.470

Stephanie Bogan: is looking at your quarterly review guide in that business launch plan so you have your one page plan, and then we created these follow up forums to help you turn that into.

464

01:10:16.890 --> 01:10:26.730

Stephanie Bogan: A guide that you can check in on quarterly the results results roadmap in the top left hand corner right, what are the priorities for this quarter, what are the owners and dates.

465

01:10:27.150 --> 01:10:42.240

Stephanie Bogan: And then your 90 day launch pad report, which is how you hold yourself and your team, you can use this in your masterminds, which is good idea to hold each other accountable, so the idea with this is ultimately end up in a place where you have to go back.

466

01:10:45.030 --> 01:10:53.850

Stephanie Bogan: Right, you have clarity of mission your big why your vision your values regular 123 year goals is the one page business plan that includes your key objectives.

467

01:10:54.120 --> 01:11:06.960

Stephanie Bogan: which define your quarterly priorities that you manage in a weekly huddle and then you execute over time people processes and problems and the quarterly Business Review is how you make sure that the rocket is pointing.

468

01:11:07.350 --> 01:11:16.710

Stephanie Bogan: In the direction that it needs to go and whatever needs to be addressed to keep it launching great with the momentum that we want are the things that we focus on that quarter.

469

01:11:17.610 --> 01:11:25.650

Stephanie Bogan: So if there's a market opportunity as there wasn't coven right, you might stop and shift your plan that quarter, but generally The goal is to set the plan for the year.

470

01:11:26.010 --> 01:11:37.710

Stephanie Bogan: and focus in a more disciplined way and to direct our energy towards this, the few set of activities that will achieve the goal, and I know Adam and Tom were talking about this, we say it all the time that limitless.

471

01:11:38.310 --> 01:11:46.920

Stephanie Bogan: More isn't better better is better it's much more important to get a good structure in place pick a channel or two and really focus there.

472

01:11:47.490 --> 01:11:59.640

Stephanie Bogan: In terms of growth, focus on your productivity, where your value if you're focusing on right pricing or expanding services or building out your service models like what are the key objectives that you want to focus on next year.

473

01:12:00.210 --> 01:12:08.760

Stephanie Bogan: Let those objectives died, the goals, the objectives might be enhancing productivity or driving profitability growth, more three more time off and well being.

474

01:12:09.780 --> 01:12:13.020

Stephanie Bogan: And that should come, then all the way back through the process.

475

01:12:14.340 --> 01:12:32.460

Stephanie Bogan: where you are able to identify very clearly what you're focused on managed to that each quarter and then go through that process on a rather lather rinse repeat basis so i'm going to pause there and we're going to break you back out into groups, my phone time falling in a chair.

476

01:12:34.230 --> 01:12:41.250

Stephanie Bogan: Alright, so we're going to take another 12 minutes was that was that enough time for you guys to kind of quickly go through, or do you want a few more minutes.

477

01:12:44.670 --> 01:12:46.590

Ryan A. Smith, CFP®: Maybe 15 minutes might be a little bit more.

478

01:12:46.890 --> 01:12:55.950

Stephanie Bogan: Okay, so we've got exactly 15 minutes left for our call, so why don't we take, can you do 13 minutes Leona and then we'll come back and regroup for the last two.

479

01:13:03.000 --> 01:13:03.330

Limitless Adviser: alright.

480

01:13:05.850 --> 01:13:10.050

Stephanie Bogan: Alright, so we'll we'll get we'll split the difference 1313 and a half.

481

01:13:13.980 --> 01:13:14.130

Stephanie Bogan: want.

482

01:13:14.610 --> 01:13:26.850

Stephanie Bogan: you're not going to fill out all these forms in that time, obviously, what I want you to get clear on as we've talked about the growth retreat and what your growth goals are for next year either in terms of rape tangible or intangible measures.

483

01:13:27.330 --> 01:13:33.720

Stephanie Bogan: That should intern inform your Q4 priorities, so that this is the quarter that you're wrapping up this year.

484

01:13:34.020 --> 01:13:46.920

Stephanie Bogan: And you're really looking at what tracks and groundwork, you need to lay for next year, so the real big question here is what is your move the needle priority for Q4 that will most set you up for success in 2022.

485

01:13:47.670 --> 01:13:59.040

Stephanie Bogan: And with that Leona is going to send you into another set of breakout rooms, to answer that question with each other and then we'll come back do a quick wrap up and I will let you know what your accountability surprises.

486

01:14:00.180 --> 01:14:05.790

Limitless Adviser: Okay, remember to click join and then, if you end up in a room by yourself will move you to where there are people.

487

01:14:33.930 --> 01:14:34.410

Stephanie Bogan: Okay.

488

01:14:36.420 --> 01:14:45.180

Stephanie Bogan: Great so probably just know 15 minutes for these is good, so I can obviously get more efficient, with the TEE up and then just give them more time on.

489

01:14:46.020 --> 01:14:54.330

Stephanie Bogan: The direction or next time just do one two topics, instead of two, I just wanted to really a couple of them, so I think will be will be totally fine on time hey buddy.

490

01:14:55.410 --> 01:14:55.650

Stephanie Bogan: You.

491

01:14:55.770 --> 01:14:57.360

Betty Wang: Did you get buyers by myself.

492

01:15:01.290 --> 01:15:01.830

Stephanie Bogan: Totally good.

493

01:15:01.890 --> 01:15:02.970

Limitless Adviser: I just reassigned you.

494

01:15:03.330 --> 01:15:04.170

Betty Wang: Okay, thank you.

495

01:15:04.530 --> 01:15:05.100

you're welcome.

496

01:15:09.960 --> 01:15:12.330

Stephanie Bogan: Alright, you really do need to get a glass of water, it will be right back.

497

01:18:14.280 --> 01:18:14.940

Stephanie Bogan: A little notice.

498

01:19:20.850 --> 01:19:27.210

Limitless Adviser: So it looks like we have about eight minutes till the end of the call what time do you want me to give them a few minutes.

499

01:19:27.510 --> 01:19:28.680

Stephanie Bogan: How long have they had.

500

01:19:29.760 --> 01:19:31.830

Limitless Adviser: About eight.

501

01:19:32.880 --> 01:19:34.020

Limitless Adviser: Eight or seven minutes.

502

01:19:34.560 --> 01:19:38.310

Stephanie Bogan: Okay, so 974 more minutes let's give them 12 minutes.

503

01:19:38.850 --> 01:19:39.210

Okay.

504

01:21:47.340 --> 01:21:47.970

alright.

505

01:23:34.320 --> 01:23:36.900

Limitless Adviser: i'm going to close them out and it gives them a 22nd warning.

506

01:23:37.260 --> 01:23:37.920

Stephanie Bogan: Okay, great.

507

01:24:06.870 --> 01:24:09.270

Stephanie Bogan: Alright buddy are you crystal clear now.

508

01:24:10.560 --> 01:24:11.340

Betty Wang: super clear.

509

01:24:13.050 --> 01:24:14.250

Stephanie Bogan: All right, I know.

510

01:24:14.310 --> 01:24:23.280

Stephanie Bogan: I can definitely tell so we did two topics today, one I really wanted to go over the growth treat and the playbook to really make sure everyone had sort of that.

511

01:24:23.580 --> 01:24:33.900

Stephanie Bogan: clear line of sight between all that content and opportunity and right how you use the playbook to turn that into a clear, simple plan and the conversation about.

512

01:24:34.230 --> 01:24:37.320

Stephanie Bogan: What growth really is, and what really shows up in that plan.

513

01:24:37.590 --> 01:24:47.490

Stephanie Bogan: Which is a nice segue into what I thought would be helpful in terms of just going even quickly back through the quarterly Business Review and having you guys to reorient to that process, because we will be.

514

01:24:47.940 --> 01:24:56.370

Stephanie Bogan: Continuing that in a more structured way So all in all, I think we did pretty good on time we did two topics into breakouts, but do you guys like the breakouts.

515

01:24:57.270 --> 01:25:02.220

Stephanie Bogan: Again, just allowing a little more time I just really want to let you guys engage more with each other.

516

01:25:02.850 --> 01:25:14.490

Stephanie Bogan: So we'll definitely keep that on the queue for our next call, so thank you for that feedback all right, so what I hope that you guys have at this point is a clear sense of.

517

01:25:14.880 --> 01:25:22.110

Stephanie Bogan: How all of the growth retreat and the the Ford focus in terms of what we do to lay the groundwork and Q4.

518

01:25:22.410 --> 01:25:30.450

Stephanie Bogan: For rate, the more and better that we want to create in 2022 is some clarity around what that is with some specificity.

519

01:25:30.840 --> 01:25:36.630

Stephanie Bogan: Making it specific is more real for your brain it helps it connect the dots in terms of.

520

01:25:36.960 --> 01:25:47.310

Stephanie Bogan: You notice those exercises we went through where when you get really clear whether it's one client or 100 million dollars and then you ask like what's it going to take what channels, will I focus on.

521

01:25:47.700 --> 01:26:02.430

Stephanie Bogan: right if you answer those questions that will get narrow quickly so that you can start to ferret out what your plan will be same thing in the strategic planning process and now, in this case the quarterly Business Review oh my videos i'm sorry.

522

01:26:05.190 --> 01:26:17.430

Stephanie Bogan: That you're talking to myself didn't know the quarterly Business Review is that pause all along the way of the track to really assess our progress and create clearly defined and aligned.

523

01:26:18.000 --> 01:26:28.110

Stephanie Bogan: Action plans for the coming quarter that really align with their goals for the year and is obviously as we hit Q4 that really align with the things that you want to accomplish in 2022 so.

524

01:26:28.500 --> 01:26:39.810

Stephanie Bogan: emoticons or thumbs up or head nods do you guys have a clear sense of how you're going to apply this information in Q4 and what you're going to be focused on as you work through the rest of October.

525

01:26:41.730 --> 01:26:50.370

Stephanie Bogan: Right If at any point you don't you're in it is a group coaching program but the word coaching is actually in there and we do a whole lot of that around here.

526

01:26:50.700 --> 01:27:04.830

Stephanie Bogan: If you have any hesitations reservations, lack of clarity drop me a note on tribe and that's what I want everyone to do so this is your surprise accountability act is the success friends that we did over the summer, for those of you that use them.

527

01:27:06.090 --> 01:27:13.590

Stephanie Bogan: We were on there and we were talking and you were supporting each other and asking questions, and I was encouraging and giving feedback, so we want to continue that.

528

01:27:13.980 --> 01:27:18.660

Stephanie Bogan: model of helping you create clarity for your group and for us in your tribe is.

529

01:27:18.930 --> 01:27:26.550

Stephanie Bogan: I want everyone this week to go in and drop on tribe, even if you're in 35 minutes drop in there, what is your move the needle.

530

01:27:26.790 --> 01:27:35.520

Stephanie Bogan: Priority for Q4 and then create a clear accountability act right are you going to have to do the happy dance, and you know your mastermind call.

531

01:27:36.060 --> 01:27:44.070

Stephanie Bogan: what's it going to be either you know consequences good or bad that are going to hold you accountable i'm going to be looking in there, so I want to make sure that you all.

532

01:27:44.550 --> 01:27:57.150

Stephanie Bogan: Find put a note on your pad right now to do that, so we can make sure that we're all aligned and supporting you is you focus on your move the needle priority in Q4 alright with that, ladies and gentlemen, we are going to wrap this I did.

533

01:27:59.550 --> 01:28:09.180

Stephanie Bogan: You see my video, you should be able to see my video, I can see you guys okay all right was today's call helpful in terms of just drilling down into growth retreat and the quarterly Business Review.

534

01:28:09.720 --> 01:28:21.000

Stephanie Bogan: Is everyone committing to do some form of the business review in the next couple of weeks just even if it's taking an hour over lunch and going through the excellent let that Nick Thank you very much, I promise.

535

01:28:21.750 --> 01:28:31.050

Stephanie Bogan: All right, you're in a coaching program because our goal is to turn ideas into action and accountability help, so the more that you can create clarity for me and your tribe.

536

01:28:31.710 --> 01:28:37.350

Stephanie Bogan: by dropping your accountability goal in there, this week, the better we'll be able to support you with that everyone.

537

01:28:37.620 --> 01:28:46.680

Stephanie Bogan: Make sure that you are clear and focused and at work, and if we can support you every day in any way you know where to find us so with that you guys have a fantastic week take care.

538

01:28:50.640 --> 01:28:51.330

Michael - Frontier Wealth Strategies: Thanks stephanie.

539

01:28:51.480 --> 01:28:53.100

Stephanie Bogan: you're welcome have a great day.

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