

LIMITLESS Coaching Call Transcript

MARCH 23RD, 2022
VALUE U RETREAT
MARKETING TO YOUR NICHE

18

00:10:51.450 --> 00:11:00.300

Lisa Vander: Alright, so if you're in this room we're going to make some assumptions that you are at least somewhat clear as to who you do your best work for how you do it.

19

00:11:00.570 --> 00:11:06.840

Lisa Vander: And what that ongoing service model looks like right we talked yesterday in this room about just kind of crafting that service model.

20

00:11:07.410 --> 00:11:17.040

Lisa Vander: And how the narrower that audience becomes the easier, relatively speaking, it can be to create that service model, what we want to do now is in this conversation.

21

00:11:17.370 --> 00:11:23.400

Lisa Vander: kind of back the train up a little bit and start at the top of how do you promote position and prospect yourself.

22

00:11:23.640 --> 00:11:33.930

Lisa Vander: within your niche so don and I are going to talk through our respective journeys what is working well for us, our intention is to spend 30 minutes to go through our lesson goes to the content that we have here today.

23

00:11:34.260 --> 00:11:42.420

Lisa Vander: Then we will open it up for Q amp a and then that will give you that will kind of lead into your worth time to start formulating some ideas.

24

00:11:42.930 --> 00:11:50.790

Lisa Vander: There we go formulating some ideas your next best step i'm a really, really big fan of those three words what's your next best step.



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00:11:51.150 --> 00:11:54.450

Lisa Vander: That you're going to take like you said we've talked a lot about overwhelm and about.

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00:11:54.900 --> 00:12:05.100

Lisa Vander: 80,000 different ideas that you're going to come away from the from our time here over these over these past couple of days, what are you solving for and what's your next best step in that process so.

27

00:12:06.300 --> 00:12:11.760

Lisa Vander: The biggest thing that is hard to comprehend really hard to comprehend it can be sometimes hard to accept.

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00:12:12.150 --> 00:12:21.900

Lisa Vander: Is that going into a niche and becoming that resident expert where people are now being attracted to you, instead of you pursuing them.

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00:12:22.470 --> 00:12:29.190

Lisa Vander: Is the long game there's a book out there, called the long tail which just kind of talks about this, that this the the ever.

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00:12:29.550 --> 00:12:38.580

Lisa Vander: The long tail of any event that you do any process inevitably can pay the biggest dividends, but it's not the sizzle in the pan, this is not this is.

31

00:12:38.850 --> 00:12:46.410

Lisa Vander: not going to be an all sizzle no steak presentation we want to emphasize that it is a long runway to get to that point of developing that expertise.

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00:12:46.800 --> 00:12:55.410

Lisa Vander: I can say, on the other end of that it's a glorious position to be in when you're when you are the resident expert and you're having to manage for capacity.

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00:12:57.270 --> 00:13:03.510



Lisa Vander: How do you really market to your niche there are a lot of different ways in which you can market to your niche right there's.

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00:13:03.990 --> 00:13:09.270

Lisa Vander: kids it says done some work on you know, five or six different types of niche marketing that you can do.

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00:13:09.540 --> 00:13:18.300

Lisa Vander: I am obviously a big proponent for profession based niche marketing, for me, what i've observed in profession niche in profession based niche marketing.

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00:13:18.570 --> 00:13:26.430

Lisa Vander: Is that it helps from an efficiency standpoint for me to not only be really effective and efficient in attracting people to our firm.

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00:13:26.670 --> 00:13:33.600

Lisa Vander: But on the back end of that from a service standpoint, it allows us to be really, really efficient in crafting our service model or deliverables or value adds.

38

00:13:33.990 --> 00:13:43.770

Lisa Vander: contrasting that one of the other niches that I could pursue if I wanted to everybody knows I love general general aviation love being a pilot I could do as RON Carson did passion prospecting right.

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00:13:44.220 --> 00:13:51.090

Lisa Vander: RON RON loves nebraska football pilots aviation and wine and that's what he did a lot of passion prospecting.

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00:13:51.510 --> 00:13:57.840

Lisa Vander: My contention with that is it's not impossible because obviously RON did something pretty darn well building the firm that he built.

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00:13:58.290 --> 00:14:01.620

Lisa Vander: But on the service side of things, it can be a little bit more.

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00:14:02.430 --> 00:14:11.670

Lisa Vander: You got to be a little bit more strategic in that, because now, you could potentially have a client base master of the ones right they all have a common denominator of sharing whatever passion, it is that you have, but you might have.

43

00:14:12.120 --> 00:14:22.110

Lisa Vander: A pilot that's a business owner, you might have a pilot that's an engineer, you might have another one that's a real estate mogul like there's all kinds of different things So how do you craft that service model that's just something to be cognizant of.

44

00:14:22.410 --> 00:14:35.070

Lisa Vander: As you're not necessarily defining your niche but thinking about how you're going to market to that niche referrals with seo wise personal interest again multiple different ways in which you can build and craft and market towards your niche.

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00:14:36.570 --> 00:14:46.770

Lisa Vander: don has really done a great job of perfecting and narrowing down who he does his work, for which is a little bit different than ours down, you want to share a little bit about what you've done yeah.

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00:14:47.730 --> 00:15:05.490

Lisa Vander: First off you're so intimidating because so polished I feel like i'm always nervous if you see me shaking that's deliberate I we're all friends here my friend, that said a lot guys, thank you, thank you so maybe like 36 months ago I was hearing him speak and so forth, and.

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00:15:07.080 --> 00:15:13.890

Lisa Vander: Hopefully, like like all of you this felt or feels like a fire hose of information, so I chose one if not two things to really focus on.

48

00:15:14.280 --> 00:15:23.490

Lisa Vander: and made it a point to say Okay, when the head trash comes out of a meditation and i'll make it a point to get really good at two things it was surge and it was niche.

49

00:15:24.030 --> 00:15:39.510

Lisa Vander: Maybe in that order and I felt that my niche is an expression of who I am and that's what kept me motivated because this stuff is hard for me at least it's stuff is really hard so again when I look at my mentor or mentors Adam very polished.



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00:15:40.530 --> 00:15:48.630

Lisa Vander: You see me right, like yours, I mean, thank you, thank you kudos to don I have not gotten shout outs and chat in the virtual about my shoe game.

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00:15:48.990 --> 00:15:55.170

Lisa Vander: don has gotten multiple different comments on his Jordan shoe game, so my my boots are not anything compared to here.

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00:15:55.680 --> 00:16:03.180

Lisa Vander: To here Jordan so well and then this is actually a deliberate too, because I used to work lasers, in fact I knew Adam was going to show up all polishing stuff, and I mean that's a compliment.

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00:16:03.600 --> 00:16:11.970

Lisa Vander: I tried wearing on my I tried where my blazers I used to be a triathlete ironman and so forth, they don't fit me anymore, plus cope it wasn't friendly to me so i'm 30 pounds over here's the thing.

54

00:16:12.360 --> 00:16:18.480

Lisa Vander: When I go to Google, this is how we dress I used to be the one wearing a suit and what they said to me for four years.

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00:16:18.930 --> 00:16:30.090

Lisa Vander: done so, you were that guy who always got the interviews, but we never hired you because i'm always in the suit and I don't know how it is for rescue but smart casual so hard to dress I don't know how to do it.

56

00:16:30.510 --> 00:16:33.900

Lisa Vander: So you saw me wearing glasses that didn't work very well I got a headache the middle of the day.

57

00:16:35.880 --> 00:16:41.370

Lisa Vander: So i'm glad you get my humor that's all I do when I talked to my goodness i'm not trying to say.

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00:16:42.000 --> 00:16:48.540



Lisa Vander: you're hired me I know about standard deviation or don't you know what we would like to you because you really do a good Monte Carlo, no, no, no.

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00:16:48.990 --> 00:17:00.300

Lisa Vander: it's really about, for me, bringing the human element, and you can see here, you know for compliance reasons compliance compliance can't really show the pictures, but I show up if a client or Google or says done we planted a tree.

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00:17:01.800 --> 00:17:07.560

Lisa Vander: How far do you live, I want to be there because, when that tree grows we're going to use that as an analogy to how we grow your money right so.

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00:17:08.910 --> 00:17:12.060

Lisa Vander: Right it's like i'm shaking can take this super nervous.

62

00:17:14.220 --> 00:17:20.880

Lisa Vander: Right Okay, so the way I committed to my niche was Okay, who are the people I want to work with.

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00:17:21.450 --> 00:17:31.470

Lisa Vander: It didn't necessarily mean working at Google it's just I work with people who happen to be highly compensated who happen to be high good savers, like me and who happen to work in big tech.

64

00:17:31.740 --> 00:17:35.580

Lisa Vander: So I just see it as every day I get to work with people, just like me.

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00:17:35.850 --> 00:17:47.760

Lisa Vander: So the authentic self shows as i'm able to build my practice when you think back to the decision making matrix that you went through and kind of made that commitment to effectively burn the ships and only.

66

00:17:48.240 --> 00:17:53.100

Lisa Vander: Maybe not only but put a very, very big emphasis on working with with Google owners.

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00:17:53.550 --> 00:17:57.840

Lisa Vander: What was that catalyst what was it there something that came to mind on.

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00:17:58.140 --> 00:18:09.420

Lisa Vander: Why you enjoyed working with them, was it the that you just liked RS us and equity compensation, did you have family that worked at Google What was your affinity an attraction to Google I love that question so.

69

00:18:10.110 --> 00:18:21.540

Lisa Vander: When I when I first started, I was a fan of Google during my broker dealer days for UBS back in the day and, at the time I was 25 years old, Google was four years since ipo.

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00:18:21.930 --> 00:18:31.890

Lisa Vander: So it was it was everything big tech to me was young, it was disruptive I felt that way, because at the time you had Intel and Microsoft already established Google was exciting so.

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00:18:32.490 --> 00:18:43.200

Lisa Vander: My first Google I call him or her agent zero, and I remember getting a coi call, and all I remember, was done, I have this high level program engineer at Google.

72

00:18:43.680 --> 00:18:52.320

Lisa Vander: That need help, and I was all in I didn't know how to quantify them I didn't know what their assets were but the idea of showing up at the Google office to walk like this in the Office like.

73

00:18:54.690 --> 00:19:04.890

Lisa Vander: it's amazing right, I was a fan, so the fact that I was able to show up didn't feel like work, I felt like my first question till this day is.

74

00:19:05.880 --> 00:19:13.830

Lisa Vander: what's it like working at Google it's so awesome because I can go into my spiel talk about you know finance, but I want to hear about you told me about you.

75

00:19:14.280 --> 00:19:24.090

Lisa Vander: You know vocal vomit to me and I will do my best to align it to financial decisions, but the end of the day we will have a tremendous experience because i'm here to learn and yeah and like.



76

00:19:26.490 --> 00:19:36.150

Lisa Vander: abbreviated before and after where were you when you started and and how was that what was that impact and what was the timeline right because back to that first slide.

77

00:19:36.600 --> 00:19:49.470

Lisa Vander: The the frustration that advisors can sometimes feel is Adam I just need more clients if I just had more prospects, if I just had more clients than all of my worries would just fall away and i'd be the happiest advisor in the world.

78

00:19:50.460 --> 00:19:58.500

Lisa Vander: Different conversation about that right because that's not what happens because better you just amplifying a problem if you don't have systems in place different conversation, but my point there is.

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00:19:59.550 --> 00:20:08.250

Lisa Vander: We say it is a year, plus two, sometimes even three year runway depending on what modality you're going to pursue your market.

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00:20:09.480 --> 00:20:20.640

Lisa Vander: My i'll talk a little bit of a mind what was your what was that timeline look like and what was the impact that you had and what you're experiencing now okay so before this I was just over 200 gross solo practitioner.

81

00:20:21.120 --> 00:20:30.930

Lisa Vander: Six months until limitless surge and niche I went to 306 months and even know stephanie had to say wow look at this and.

82

00:20:31.290 --> 00:20:39.750

Lisa Vander: I thought wow I haven't even just haven't even felt I tried so long story short, within 24 months I doubled my income, but I was working less because I was.

83

00:20:40.140 --> 00:20:47.310

Lisa Vander: Tackling my niche I knew what their pain points were and I was just enjoying my work, I got lost in my work, the numbers took care of itself and my philosophy is.



84

00:20:47.880 --> 00:20:57.270

Lisa Vander: The money will be there as long as I prioritize helping others that's that's what keeps me going that's what keeps away the head trash well, and the reason that I asked that question and wanted.

85

00:20:57.510 --> 00:21:07.260

Lisa Vander: to share his experience in the growth trajectory that he that he experiences that we're all here let's call a spade a spade we're all here to grow bigger businesses in less time.

86

00:21:07.950 --> 00:21:14.820

Lisa Vander: that's the unicorn equation that's the unicorn variable that we're looking to create here, the idea of niche marketing.

87

00:21:15.270 --> 00:21:19.860

Lisa Vander: And going where the fish are is akin to firing with a rifle instead of a shotgun.

88

00:21:20.430 --> 00:21:31.650

Lisa Vander: Right, with a shotgun approach, we can do the spray and pray method we can just go in there guns blazing and do shred at parties and do JP Morgan market analysis updates and we can do, let me talk to you about rock conversions.

89

00:21:32.850 --> 00:21:43.500

Lisa Vander: right but that's the generic way of doing it, which is more of a spray and pray and a let me see if I can pull this slot machine lever in just by happen just by happenstance.

90

00:21:44.070 --> 00:21:50.850

Lisa Vander: run a couple of triple sevens or whatever berries, or whatever i'm not a slot player or a gambler, for that matter, i'll just stop with that metaphor.

91

00:21:51.480 --> 00:21:57.720

Lisa Vander: Or you can take that sniper rifle approach go fishing, where the fish or whatever metaphor, that you want to use.

92

00:21:57.990 --> 00:22:05.400

Lisa Vander: to realize that at the narrower that you take your message, and this is, this was the Epiphany



and the interesting paradox that I experienced going through this.

93

00:22:06.270 --> 00:22:10.110

Lisa Vander: I started out with white coats right, it was Thomas dentist pharmacist and physicians.

94

00:22:10.320 --> 00:22:21.000

Lisa Vander: I had a little bit of a niche and even even in those four I had sub niches with pharmacist, I specifically worked with CBS pharmacist at the PhD level and above pharmacist in charge.

95

00:22:21.420 --> 00:22:32.310

Lisa Vander: The reason for that is because pharmacists in charge on up or qualify or were part of their compensation part of their bonus, it was paid out and every March was through non qualified stock options which then transition to ours us.

96

00:22:32.610 --> 00:22:44.310

Lisa Vander: And I enjoyed learning about that I had CVs as SPD memorized and I would do dinners with CDs and I one of my biggest rainmakers at that time is still one of my great clients, one of the 20 clients that I held on to but, as I transitioned my book over to john.

97

00:22:45.180 --> 00:22:48.450

Lisa Vander: But then I get this invitation to go to a dentistry event shiny object.

98

00:22:49.050 --> 00:23:01.110

Lisa Vander: And I would go do the ids the indianapolis district dental society and I go do their their fair and their golf outing and i'd start shaking hands and write columns for them and look at the dental dental economics guess what happened to my momentum in the pharmacy space.

99

00:23:01.980 --> 00:23:05.340

Lisa Vander: And then I get invited to go speak at Franciscan.

100

00:23:06.780 --> 00:23:18.300

Lisa Vander: Franciscan alliance Franciscan St Francis or whatever the hospital organization is in indianapolis hey can you come talk to some some attendees are some are not attending some residents sure squirrel right i'll go ahead and do that.



101

00:23:18.900 --> 00:23:27.210

Lisa Vander: guess what happened to my momentum with ids so my point with that the narrower that I took my message, and as I crafted who my ideal Avatar was.

102

00:23:27.540 --> 00:23:35.970

Lisa Vander: The easier, it became to create a message and create content and as a get narrower with that message and just hone in with that sniper rifle.

103

00:23:36.420 --> 00:23:42.480

Lisa Vander: Every shot that you fire ready fire aim right we're here to we're here to get ready today.

104

00:23:43.440 --> 00:23:49.020

Lisa Vander: I want to make sure that you have the enough information for your next best step to fire that first shot and see where it lands.

105

00:23:49.350 --> 00:23:58.980

Lisa Vander: And then recalibrate reevaluate and reengage that's the goal of niche marketing to get that message as narrow as possible, where now my message the content that i'm creating.

106

00:23:59.460 --> 00:24:04.740

Lisa Vander: is largely based for optometric private practice owners that have either own their practice for at least five years and are doing one.

107

00:24:04.770 --> 00:24:11.220

Lisa Vander: 1 million in top line revenue or they're within five years of selling your practice, ideally, I will work with them in negotiating and sale to a private equity firm.

108

00:24:11.820 --> 00:24:18.150

Lisa Vander: will work with other ODS other odd practice owners and I actually have a referral relationship with another advisor out there.

109

00:24:18.900 --> 00:24:21.960

Lisa Vander: That also works with optometrists but he doesn't want to work with practice owners.



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00:24:22.380 --> 00:24:28.470

Lisa Vander: Both his parents are optometrists they own their practice and, ironically enough really doesn't want to work with practice owners, he just liked working with associates.

111

00:24:28.950 --> 00:24:37.950

Lisa Vander: he likes working through student loan analysis and like sweet I finally have someone else that knows optometry that I can send my non ideal prospects so i'm a rainmaker for him.

112

00:24:38.370 --> 00:24:53.700

Lisa Vander: My again I want to talk about that the message that we want to share here today is the the narrower that you can take that message, the easier all of those dominoes that's that we stack up for you in limitless the easier those dominoes are to knock down.

113

00:24:55.020 --> 00:24:59.490

Lisa Vander: hold that thought we're going to make sure that we get through content and then we'll and then we'll go ahead, through Q amp a.

114

00:25:00.810 --> 00:25:10.500

Lisa Vander: So again, are you speaking to someone or everyone like get that message tightened up and when you're writing your content when you're doing video if you're doing a podcast if you're doing coi.

115

00:25:10.830 --> 00:25:18.210

Lisa Vander: Whatever it is that you're going to be doing always think about asking yourself who am I talking with if i'm reading this content.

116

00:25:18.960 --> 00:25:33.390

Lisa Vander: Think qualitatively values qualities personality and quantitatively, what would this person bring to the table is this, who I want to hear my message and do the math this is that this was an Epiphany that I had.

117

00:25:34.980 --> 00:25:37.890

Lisa Vander: When I effectively burned the bridges and went all in on optometry.

118

00:25:38.280 --> 00:25:48.660



Lisa Vander: People will say I still about once a week we get an email from an advisor that wants to bend my year and schedule a time to talk with me and we've scripted out this whole email that Kathy will just send off to them.

119

00:25:49.050 --> 00:25:58.290

Lisa Vander: With a link to resources and kids interviews and things like that, but the point in that is when they find out one of the reasons that they reach out is like I can't believe you only work with optometrists.

120

00:25:58.590 --> 00:26:05.640

Lisa Vander: Like What do you do with all the other people that that your referrals and people that reach out that aren't optometrist and I just sit back and laugh because.

121

00:26:06.120 --> 00:26:18.930

Lisa Vander: hey no one else that's not an optometrist is reaching out because when you go to our website, you know in 1.5 seconds or however long it takes you to read five words helping optometrists plan life on purpose six words whatever.

122

00:26:19.950 --> 00:26:26.610

Lisa Vander: That you're not i'm repelling 99.996% of the general population, I think, is what the math comes out to be.

123

00:26:27.060 --> 00:26:39.660

Lisa Vander: there's 11,000 private practice owners in the country optometry private practice owners there's 35,000 give or take depending on how you're measuring it and graduating classes and things like that 35,000 ish optometrists.

124

00:26:41.340 --> 00:26:47.370

Lisa Vander: My number for my practice the next iteration of my business plan is to advisors 200 households 2.5 million in revenue.

125

00:26:48.240 --> 00:26:53.940

Lisa Vander: that's the numbers that we've that we've crunched So do I think that with the trifecta of inbound.

126



00:26:54.450 --> 00:27:02.160

Lisa Vander: content that i'm creating the sneaky that i'm doing nationally, the writing that i'm doing for national publications and 2020 money Those are the three general drivers of.

127

00:27:02.670 --> 00:27:11.850

Lisa Vander: inbound relationships that are reaching out to our firm do I think that I can attract 200 households out of 11,000 private practice owners.

128

00:27:12.840 --> 00:27:15.630

Lisa Vander: i'm a blue ocean mentality kind of guy yeah i'm pretty sure I can.

129

00:27:16.050 --> 00:27:23.160

Lisa Vander: So whatever niche that you're thinking about what however you, however, you're doing that right if I wanted to do passion prospecting and work with pilots great.

130

00:27:23.400 --> 00:27:31.260

Lisa Vander: I go to the FAA database and I can pull the fact that there are 200 I think I don't even know what the number is I can find how many private pilots are out there and I can search by.

131

00:27:31.680 --> 00:27:34.050

Lisa Vander: search certification ratings and things like that.

132

00:27:34.560 --> 00:27:43.860

Lisa Vander: Whatever your ideal Avatar is whatever that common denominator, that they have if you're having some of those limiting beliefs of oh I can't say no to 99% of people I can't I.

133

00:27:44.220 --> 00:27:49.050

Lisa Vander: um yeah they brought \$2 million, but they're not my niche I guess i'll say yes to them oops scarcity.

134

00:27:49.560 --> 00:27:53.910

Lisa Vander: You know basket in the desert I better take it now, because I don't know when the next one's going to come along.

135



00:27:54.510 --> 00:28:06.330

Lisa Vander: Do the math on whatever. However, your qualifying those prospects as best you can, and that for me is what helped basically put out that fire that started in my mind whenever I got the scarcity, like.

136

00:28:06.900 --> 00:28:12.450

Lisa Vander: I'm only going to work with optometrist how many rulers are there over 100,000 think don't is going to be okay.

137

00:28:13.560 --> 00:28:16.620

Lisa Vander: How many do you need to build your ideal practice six to eight per year.

138

00:28:17.880 --> 00:28:18.270

Lisa Vander: ballgame.

139

00:28:19.680 --> 00:28:22.020

Lisa Vander: Right don't overcomplicate it.

140

00:28:23.220 --> 00:28:25.950

Lisa Vander: Anything that you did yeah you're like my idol like.

141

00:28:28.740 --> 00:28:33.660

Lisa Vander: What benefit do I get like right like the way he's framing it I'm thinking Why am I sitting next to him.

142

00:28:35.640 --> 00:28:43.200

Lisa Vander: So, so this is a good friend can I, so can you pass me my copy please because I'm dying right now, thank you, Sir step in front of secret sauce.

143

00:28:46.140 --> 00:28:50.700

Lisa Vander: Okay, so great segue for me don't overcomplicate it when I hear Adam it's like.

144

00:28:51.060 --> 00:29:00.030

Lisa Vander: I mean, this was a compliment turn headlights like oh my gosh I do not know my business



like that, but your vision is different it's crafted for you me, you don't just how he asked me how many clients Do I need.

145

00:29:00.540 --> 00:29:12.900

Lisa Vander: six eight no problem, so what great marketing there's a Google conference right now that was hilarious did you see the sign yeah that was intended yeah so so normally if I want to use the shotgun analogy.

146

00:29:13.800 --> 00:29:30.360

Lisa Vander: i'm not gonna do that i'm not gonna go hey guys what's up friend, how we can Google kind of what's going on, no, no, no, no, because I don't work necessarily with all good lawyers 90% at least of my colors are women, I don't know why I don't know why but that's the case.

147

00:29:31.770 --> 00:29:40.980

Lisa Vander: Maybe 80% our site reliability engineers, the fun ones, for me, the one that was exactly site reliability engineers their job.

148

00:29:41.400 --> 00:29:48.510

Lisa Vander: is to keep the Google screen when you search white because there's all of this yeah see I know this stuff because company does it take to do that.

149

00:29:48.900 --> 00:30:00.240

Lisa Vander: A lot of time i'm very sarcastic in that, but it demonstrates I don't know jack about that and that's Okay, because he does so so and here's here's my my my rare moments of poise because again super anxious.

150

00:30:01.740 --> 00:30:06.210

Lisa Vander: I do not feel compelled to go in that room and like destroy my business cards like you're paying me for them.

151

00:30:06.870 --> 00:30:11.640

Lisa Vander: Because I know my niche it's you know that I saw that room I took a glance where sports Christian Christian.

152

00:30:12.300 --> 00:30:18.240



Lisa Vander: So he and I he called my bluff as a Christian let's let's call the walk this room right now buddy and he said yeah i'm like crap I was kidding.

153

00:30:18.930 --> 00:30:28.350

Lisa Vander: Because I already knew that when I saw the room, nine out of 10 people are men that's that's not my that's not my niche I can't do it, I don't have the gall to do it.

154

00:30:29.190 --> 00:30:42.750

Lisa Vander: And I know a lot of limiting beliefs are denied yeah so so, so I am just like my peers, and when you tell me hey can I get six to \$8 per year I think so because, without knowing my first year at limitless.

155

00:30:43.470 --> 00:30:49.860

Lisa Vander: I got I think like 16 to 18 and I said no twice, so the out of the three processing, what did you learn.

156

00:30:51.000 --> 00:31:01.260

Lisa Vander: Keep it simple What did you did you have mistakes and those 1618 oh so many I i'm a big fan of videos loom I challenge anyone to do a one page plan.

157

00:31:02.340 --> 00:31:09.000

Lisa Vander: better than me, I will own that space because that's that's yeah i'm saying it right now okay so but.

158

00:31:10.530 --> 00:31:17.880

Lisa Vander: it's it's a I have a YouTube channel in my website you click on a MAC marketing on YouTube but, but the idea is this i'm i'm i'm.

159

00:31:18.600 --> 00:31:31.110

Lisa Vander: comfortable being anxious and insecure in most things, but I know i'm confident and things that matter for myself and my clients, so when I can present, but I can immediately engage my clients or clients to show them here here's where you are is where you're headed.

160

00:31:31.500 --> 00:31:42.060

Lisa Vander: The response is done, can you come on campus to show this to our team, because we have



a whole inventory of advisors, but what you're talking about makes sense yeah i'm there show me that's how we doing.

161

00:31:43.410 --> 00:31:53.190

Lisa Vander: Well, in this in this is the point right whether it's the number of optometric private practice owners, the number of Google lawyers, I mean don could even if you wanted to.

162

00:31:54.360 --> 00:31:58.920

Lisa Vander: You could probably refine your niche and you may you already have, I know you already have but there's.

163

00:31:59.460 --> 00:32:09.570

Lisa Vander: there's probably another more a couple more iterations of how targeted your message could be of I only work with Google is in this department or I only work with Google there's one, a friend of mine who's on.

164

00:32:10.200 --> 00:32:14.130

Lisa Vander: Michael Pollack our is an advisor out in Washington.

165

00:32:14.820 --> 00:32:22.320

Lisa Vander: And having a conversation with him a couple years ago from a teaching standpoint, he was kind of having some of the reservations that I think a lot of you in the room might have of.

166

00:32:22.770 --> 00:32:29.100

Lisa Vander: Who am I to do this, can I make this leap what is that going to look like is the opportunity really there and we work through this and now.

167

00:32:29.580 --> 00:32:40.110

Lisa Vander: At least at that time, and I know he's gone through some iterations of that his ideal Avatar his ideal prospect was a costco employee, where more than 50% of their compensation was through equity grants.

168

00:32:41.970 --> 00:32:47.220

Lisa Vander: Like niche niche weird like to quote minutes Mosley Williams at one of my favorite gets us interviews.



169

00:32:47.910 --> 00:32:55.470

Lisa Vander: That will give the ADHD if you don't already have it listen to Dennis talk he's great he's brilliant and what he does, but man that guy brings a lot of energy to a conversation.

170

00:32:56.040 --> 00:32:57.270

Lisa Vander: But that idea of.

171

00:32:57.750 --> 00:33:09.660

Lisa Vander: refining down your message and refining down the numbers of what you need not only to build the practice that you want, but then to take that and contrast that to the number of opportunities out there, how many people are playing in the sandbox.

172

00:33:10.020 --> 00:33:15.540

Lisa Vander: That you're creating or that you are already going to play in right I created the sandbox of 2020.

173

00:33:16.290 --> 00:33:24.090

Lisa Vander: The podcasts that we launched right 173 episodes now the most consistent thing that i've ever done in my life, which I will tell you the secret to that.

174

00:33:24.840 --> 00:33:27.390

Lisa Vander: is knowing that my producers waiting for an episode every single week.

175

00:33:28.320 --> 00:33:37.290

Lisa Vander: If you want to be successful in podcasting, at least for me, the worst thing that you can do is absorb that responsibility all by yourself, for two reasons number one don't do that.

176

00:33:38.220 --> 00:33:44.370

Lisa Vander: it's not your it's not your unique skill set, even if you enjoy doing that will have advisor say oh Adam I like editing.

177

00:33:45.060 --> 00:33:55.770

Lisa Vander: it's fun I get to hear myself, listen to the finished episode, I do not all I listened to about



50% of my own episodes which some might say narcissistic no, I want to learn.

178

00:33:56.280 --> 00:34:03.540

Lisa Vander: I want to learn how am I asking questions, what are the questions that i'm asking, am I am I talking too much, am I talking too little.

179

00:34:03.900 --> 00:34:12.570

Lisa Vander: One of my biggest pet peeves in interviews with podcasting two things not to deviate too much here, but I know that there are those in the room here that are either interested in podcasting or have started.

180

00:34:12.990 --> 00:34:18.120

Lisa Vander: My biggest pet peeve in podcast interviews is when the host continues to interrupt the guests it's giving an answer.

181

00:34:19.140 --> 00:34:23.940

Lisa Vander: Even if it's just uh huh oh uh huh yeah shut up.

182

00:34:25.140 --> 00:34:35.820

Lisa Vander: Just let your guests answer the second thing that drives me nuts in podcast is when the host basically reiterate in their own words, what the guest just said.

183

00:34:37.080 --> 00:34:44.310

Lisa Vander: I was there, too, I heard it I don't need you to reframe it I anyway, not to digress here, but my point is.

184

00:34:45.060 --> 00:35:00.570

Lisa Vander: I chose to create a podcast 2020 money, not the year 2020 right 2020 anybody that's gotten an eye exam and gotten some of them from Boston anybody that has gotten an eye exam knows that best corrected acuity ideally as 2020 something get down to 2015.

185

00:35:01.800 --> 00:35:16.470

Lisa Vander: That resonates with my audience and I created this sandbox of 2020 money for the first three years of the podcast it took us three years to get 200,000 downloads of the podcast in the last three months we're now at 120,000 downloads.



186

00:35:17.550 --> 00:35:24.180

Lisa Vander: So how many of us have seen from a content creation standpoint, this kind of goes back to that long tail plate right that hockey stick type growth.

187

00:35:24.780 --> 00:35:31.350

Lisa Vander: I feel like 2020 money is just getting that at that inflection point where our downloads are going to continue to go up.

188

00:35:31.740 --> 00:35:43.980

Lisa Vander: And that is one of those that one of one of the three pronged approach that we have to attract our ideal type of client and the message that we're creating is continually refined down so.

189

00:35:44.460 --> 00:35:54.480

Lisa Vander: To the third point here right do same stuff as before, but focus that message down if you're blogging and you've done that great focus that message down my.

190

00:35:55.200 --> 00:36:01.770

Lisa Vander: People know that i'm you don't know already i'll say it now i'm ruthless about delegation and getting things off your plate.

191

00:36:02.580 --> 00:36:08.580

Lisa Vander: If you're writing your own blog post right now I would challenge you to think is that something that I can outsource short answer yes.

192

00:36:09.450 --> 00:36:19.350

Lisa Vander: You can script that out, you can do I do a loom video for my for my content creator just brought on a new one that's going to be basically turning 2020 money into a couple of ebooks are to me.

193

00:36:20.100 --> 00:36:23.340

Lisa Vander: they're going to be taking the top most popular episodes of 2020 money.

194

00:36:23.820 --> 00:36:31.950



Lisa Vander: Turning those into long form blog posts those long form blog blog posts are then going to be packaged up into a couple of ebooks eventually that ebook will then be published in a book.

195

00:36:32.640 --> 00:36:38.880

Lisa Vander: that's probably going to be sometime in 2023 so whatever sandbox that you're either going to create or that you're going to play in.

196

00:36:39.480 --> 00:36:48.330

Lisa Vander: know the problems that your niches facing right back to what Carl said yesterday, people don't care about our solutions they care about their problems, the more surgical that you can be.

197

00:36:48.930 --> 00:36:55.530

Lisa Vander: With what keeps them up at night, what concerns them what challenges are they facing What opportunities do they have.

198

00:36:56.700 --> 00:37:01.050

Lisa Vander: How do I manage the tax liability from irs use that get granted when I mean I.

199

00:37:01.860 --> 00:37:08.520

Lisa Vander: don't even pretend to know if that's even a thing in Google if it's non qualified or is those are but those are questions that they have.

200

00:37:09.000 --> 00:37:19.350

Lisa Vander: That he's better position than 99%, of the other advisors in the country to go ahead and answer like that which also one thing i'll say before we before we kind of move on here is.

201

00:37:20.280 --> 00:37:27.300

Lisa Vander: One of the imposter syndrome slash limiting beliefs that can creep up as you become surgical and become the expert in your niche.

202

00:37:27.570 --> 00:37:36.060

Lisa Vander: Is that you will get really, really efficient in answering questions that your niche has which, if you're like me can sometimes be a crisis of confidence to say.

203



00:37:36.780 --> 00:37:44.070

Lisa Vander: It only took me 30 minutes to do this financial plan and you're going to pay me 15,000 what yeah because we're that good.

204

00:37:44.970 --> 00:37:51.330

Lisa Vander: So don't equate the amount of money that you can make, and the amount of money that you can charge and we're going to talk about that a fee less than later today.

205

00:37:51.900 --> 00:38:02.940

Lisa Vander: don't equate the amount that you're going to charge to the time that you're going to invest with that client The ideal situation is that the better that you get in serving your niche.

206

00:38:03.510 --> 00:38:11.940

Lisa Vander: The easier it is to serve them, the quicker not cheaper, but the quicker, you can serve them, you can have more impact with more people.

207

00:38:12.540 --> 00:38:21.060

Lisa Vander: and actually work less from a time standpoint working less and delivering value are not correlated variables does that make sense.

208

00:38:22.020 --> 00:38:29.820

Lisa Vander: that's what I had an issue I had a point when I got I still remember I, and I even I think this is last year and limitless.

209

00:38:30.480 --> 00:38:41.430

Lisa Vander: idea I did a I did a financial plan for a client on a dry erase board right one of optometry clients, and this was when I just raised fees, right now, our fee schedule for practice owners.

210

00:38:42.090 --> 00:38:50.580

Lisa Vander: Is a 20 \$500 onboarding fee it's an annual fee paid into ways a 20 \$500 onboarding fee and then 695 per month, so.

211

00:38:51.630 --> 00:38:53.880

Lisa Vander: Just kind of on autopilot and 15th of every month.



212

00:38:54.930 --> 00:39:03.150

Lisa Vander: And this is one of our newer clients that we had just brought on it that a little bit higher fee schedule, we had done 595 then we did 695 and I did their financial plan on a whiteboard.

213

00:39:03.510 --> 00:39:08.670

Lisa Vander: just drawing arrows and moving money around and you're like this is great, this is awesome and i'm and.

214

00:39:09.180 --> 00:39:13.380

Lisa Vander: You know, had the poker face on thanks dad Bob about you will be in touch with next steps and.

215

00:39:13.830 --> 00:39:19.800

Lisa Vander: And I finished the meeting and then i'm like that really just happened, I did a loom video for stephanie and I think they posted it and try blasters like.

216

00:39:20.190 --> 00:39:34.050

Lisa Vander: This client just paid us \$11,000 and we picked up like 600,000 that they had sitting in their practice and we charge separately for them as well, so we had a really, really good day, so to speak, with this new client and it took me 45 minutes in a whiteboard.

217

00:39:35.490 --> 00:39:41.610

Lisa Vander: That was a limiting that was that was a breakthrough that I had to get through mentally to be comfortable.

218

00:39:42.030 --> 00:39:51.000

Lisa Vander: With the value that I delivered and how quickly, relatively speaking, I was able to deliver because previously, I had been a master the ones right had clients all over the place, and then i'd.

219

00:39:51.330 --> 00:39:55.890

Lisa Vander: have to learn a new SPD and have to learn this and have to learn this and if.

220

00:39:56.850 --> 00:40:04.050

Lisa Vander: As you know, your niche and, as you know, the questions that they have, which is why we



talked about here do do your homework know their language change the conversation.

221

00:40:04.470 --> 00:40:14.040

Lisa Vander: Are our intro call is not an intro call to triage call right are our data collection form is an intake form speak their language connect with them.

222

00:40:14.820 --> 00:40:26.580

Lisa Vander: And, as I did, that I started to realize that we were much more efficient and our ability to deliver value which had not only a positive impact on their life, it has a positive impact on my p&l as well as on my quality of life.

223

00:40:27.000 --> 00:40:34.740

Lisa Vander: I can't think of a better win, win, win situation again we talked about know your numbers here, anything that we would add to this done like I kind of talked about a little bit before but.

224

00:40:37.470 --> 00:40:38.640

Lisa Vander: No, I think you covered it okay.

225

00:40:39.990 --> 00:40:44.310

Lisa Vander: Well, I want to make sure that we're yep got like two minutes so.

226

00:40:45.720 --> 00:40:46.290

Lisa Vander: uh.

227

00:40:47.400 --> 00:40:51.750

Lisa Vander: yeah this is always my favorite one looking at websites of advisors, the generic it's either.

228

00:40:53.550 --> 00:40:59.550

Lisa Vander: Like couple strolling on a beach a lighthouse or compass, I mean Come on, and even mjud I mean.

229

00:41:01.530 --> 00:41:07.230

Lisa Vander: we're going through a reiteration on our website as well, but we've got the glasses on the homepage at least there's a little bit of a message there.



230

00:41:08.880 --> 00:41:15.150

Lisa Vander: you've done something a little bit different in the sense that your page isn't completely.

231

00:41:15.810 --> 00:41:27.270

Lisa Vander: dedicated to Google Is that correct or am I overstating no it's it's big tech, but if I can talk about on my next slide if Adams done yep alright so step be cracking you will not be cracking.

232

00:41:27.810 --> 00:41:43.950

Lisa Vander: Alright, so they're their niche is genuine content and so forth, and then I had a one on one with them, and I said hey okay I work with big tech, can you customize that yeah don't have to go on your website didn't didn't really feel tech to me oh really Okay, this is the Gary building.

233

00:41:45.000 --> 00:41:52.260

Lisa Vander: that's the biggest office in Venice beach 40 minutes away from me they didn't know that because they're not good lawyers but who's gonna recognize this.

234

00:41:52.680 --> 00:41:56.640

Lisa Vander: i'm not designing it for everybody i'm designing it for good lawyers.

235

00:41:57.060 --> 00:42:06.690

Lisa Vander: On you can't see it here, but on the bottom right it's scheduled time with me in the same icon of the internal memorandums at Google when they pay each other when they do six.

236

00:42:07.110 --> 00:42:14.880

Lisa Vander: Six star reviews pinging is texting I learned to vernacular So the idea is when I get good lawyers who go to my website.

237

00:42:15.390 --> 00:42:24.150

Lisa Vander: Their responses hey Tom thanks for making it easy it resonates and and, and this is a static screen if you go to my website they stream three pictures this.

238

00:42:24.900 --> 00:42:37.230

Lisa Vander: I mentioned before 90% of my niche are women, so I have a women engineer running on



the whiteboard that formula right that's correct algorithm excuse me, yes, yes, yes, the algorithm that keeps Google white right and then.

239

00:42:38.340 --> 00:42:47.880

Lisa Vander: A popular hang out in Venice where Google or scope, and all I do before happy hour is just a hangout rebel listen to podcasts including yours Adam.

240

00:42:48.330 --> 00:42:59.940

Lisa Vander: And then i'll meet my people my colors and i'll say you know what you think about the stock split it's happening in June hey don will it affect me know because Google doesn't pay a dividend what's the dividend.

241

00:43:01.350 --> 00:43:02.910

Lisa Vander: Why don't you schedule a meeting with me and talk about it.

242

00:43:03.990 --> 00:43:06.450

Lisa Vander: For me it's just common common language.

243

00:43:08.430 --> 00:43:14.070

Lisa Vander: So that's don's right, ours is much more right there in your face about in a different way.

244

00:43:14.730 --> 00:43:19.410

Lisa Vander: And even this is something that we're going to be changing helping optometric practice owners plan life on purpose.

245

00:43:19.860 --> 00:43:25.320

Lisa Vander: The thing that I would point out about our website and I don't want to turn this too much into a marketing website design.

246

00:43:26.280 --> 00:43:28.350

Lisa Vander: conversion is a really important thing.

247

00:43:28.560 --> 00:43:38.610

Lisa Vander: In your website, what is the next best step right talk about that here with you, I want you to



think about the visitors to your website as well, what is the next best step what's the cta the call to action that you want a visitor.

248

00:43:38.940 --> 00:43:43.320

Lisa Vander: That sees this website and says oh i'm in the right place now what.

249

00:43:44.880 --> 00:43:50.430

Lisa Vander: Our goal is to have them start here right we've got that start here button Taylor sheltie kind of.

250

00:43:51.870 --> 00:43:59.130

Lisa Vander: created that path for a lot of advisors, I did it I know a lot of others, I mean don's done a version of that on his website.

251

00:43:59.460 --> 00:44:10.950

Lisa Vander: At the top what is that next best step that you want them to take one of the ways in which people have been studied to read websites is the Z past, so they start in the upper left they move to the right, then they go down to above the fold on the left hand side.

252

00:44:11.310 --> 00:44:18.000

Lisa Vander: notice on our website, the two next decision points that we're going to have the start here and the schedule a meeting that's my cta.

253

00:44:18.840 --> 00:44:27.540

Lisa Vander: My goal is to have you scheduling meetings scheduled triage call the 25 minute conversation now there's also opportunities for them to learn more about who we serve who we are, what our processes.

254

00:44:27.930 --> 00:44:30.120

Lisa Vander: But on every single one of those pages.

255

00:44:30.630 --> 00:44:37.470

Lisa Vander: i'm intentional about what I want them to take what action do I want them to take I want them to schedule a meeting, they can also subscribe to the newsletter.



256

00:44:37.710 --> 00:44:43.380

Lisa Vander: which feeds into active campaign which then gets put into funnels and etc, and we can talk more about that, if you have questions about that.

257

00:44:44.160 --> 00:44:50.970

Lisa Vander: But the common denominator there's I want them to schedule an appointment and I want to make that as easy as possible, and knowing that they're in the right place.

258

00:44:52.470 --> 00:45:01.110

Lisa Vander: We talked a little bit about this no just using their vernacular anything that we would add to this done yeah I love, how you say call to action to me don't overlook that is so important.

259

00:45:01.560 --> 00:45:07.470

Lisa Vander: But the time I meet with my gobblers I kind of talked about this and yesterday's meeting with how to excel and then unless.

260

00:45:08.070 --> 00:45:14.370

Lisa Vander: i'm really delivered with video using video to right, so I make it a point to keep it 60 seconds or less because my lawyers.

261

00:45:14.880 --> 00:45:21.900

Lisa Vander: Are super busy so acknowledge that hey 60 seconds of your life and the idea is is when I get a referral it's usually going to happen this way.

262

00:45:22.500 --> 00:45:28.320

Lisa Vander: And we get an email from a giggle introducing me to a Google Doc me, you know such and such such and such will be done bcc.

263

00:45:29.070 --> 00:45:35.700

Lisa Vander: I sent a loom video 60 seconds or less than hey Thank you so much for introduction my only ask is you complete my discovery questionnaire.

264

00:45:35.970 --> 00:45:45.540

Lisa Vander: It takes about 510 minutes certainly take as long as you like, it can be accessed on any



smart device, ie chromebooks Samsung tablet you name it i'm sticking their language, because my goodness that's the tech they use.

265

00:45:45.900 --> 00:45:52.710

Lisa Vander: 60 seconds no problem I can use my phone what's happening that link is going to qualify them, I will know right there and then, if they meet my numbers.

266

00:45:53.040 --> 00:46:05.940

Lisa Vander: Then the second video hey thanks for coming in discovery questionnaire here's what i'm gonna go over i'm going to do a DEMO of how I plan, and I will say this in this language, if this resonates with you, if you like, the way I plan choose a date and time and our calendars.

267

00:46:07.950 --> 00:46:20.340

Lisa Vander: Will sync will sync by the time we have our first virtual meeting it's not really our first meeting is our third why because they've seen me two times, so the power of influence.

268

00:46:20.760 --> 00:46:25.620

Lisa Vander: If they've already seen me the third time something about three right it's my favorite number john stars your.

269

00:46:27.030 --> 00:46:31.920

Lisa Vander: Third time the the meat of the discussion is hey done.

270

00:46:32.550 --> 00:46:41.130

Lisa Vander: Great to finally meet you I don't have any questions, other than what's your fee structure like and what's the process going forward fan tactic hard work is done.

271

00:46:41.550 --> 00:46:53.100

Lisa Vander: I already know that my numbers, I really know they like representation accept the expectation it's just a matter of are we a good fit for each other that's that's that's how I treat my my work, so this probably isn't the time that I say my reggie Miller fan and enjoy what.

272

00:46:56.010 --> 00:46:58.230

Lisa Vander: You didn't get the whole nba history they're.



273

00:47:00.660 --> 00:47:08.700

Lisa Vander: Coming back to know your niche this this little template right here is the template that I used when I was interviewing.

274

00:47:09.180 --> 00:47:20.190

Lisa Vander: optometrists practice owners see like the the Executive Director of the indiana optometric association leaders have a local societies, this is on tribe or not, not on tribe, excuse me in community.

275

00:47:20.640 --> 00:47:26.160

Lisa Vander: If you link, or if you just go in there search I believe allison it would be nested under niche or.

276

00:47:28.110 --> 00:47:29.430

Lisa Vander: Okay, oh good.

277

00:47:30.510 --> 00:47:31.320

Lisa Vander: I should have known that.

278

00:47:32.580 --> 00:47:40.380

Lisa Vander: Thank you allison it's in your workbooks These are the questions that I use to best understand the problems that we're facing practice owners.

279

00:47:41.040 --> 00:47:53.580

Lisa Vander: use this as if you're in that situation of trying to figure out how can I show up and solve my ideal prospects my niches problems, this is the format that I use there's a couple of different tools that you can use out there, but this is one that worked well for me.

280

00:47:54.210 --> 00:48:09.300

Lisa Vander: This is the idea here is to figure out how are you going to craft your process and your planning experience around the problems that they have before they even necessarily know that they have their problem.

281

00:48:09.960 --> 00:48:14.340

Lisa Vander: Right, this is kind of along what Steve Jobs did with apple people weren't asking for the



iPhone.

282

00:48:16.470 --> 00:48:22.530

Lisa Vander: Henry Ford people weren't asking right what was his famous line if I ask people what they wanted, they just say a faster horse.

283

00:48:23.970 --> 00:48:29.520

Lisa Vander: The idea here in giving people our value proposition to our optometry clients is that.

284

00:48:29.880 --> 00:48:38.880

Lisa Vander: We know that if there were if let's say that they're already working with an advisor we say Dr prospect, we understand that if you're contemplating hiring us you're also gonna have to think about firing them.

285

00:48:39.750 --> 00:48:49.230

Lisa Vander: What I would say to you and submit to you is that the difference between your current advisor and what we do is that what they think of as world class planning is bare bones and table stakes for us.

286

00:48:49.920 --> 00:48:55.470

Lisa Vander: The difference is that we know what questions and strategies to consider for you, that neither you know your advisory team.

287

00:48:55.830 --> 00:49:05.220

Lisa Vander: Had we haven't even thought of considering, because we know the business of optometry so well does that make sense, and so what we're doing what i'm doing there's two things number one i'm seeing.

288

00:49:06.390 --> 00:49:07.260

Lisa Vander: A little bit of doubt.

289

00:49:08.550 --> 00:49:15.660

Lisa Vander: Now some might criticize that whatever it might be, but my goal with every prospect, with every relationship that we serve.



290

00:49:16.080 --> 00:49:26.490

Lisa Vander: is to have them make the right decision, the first time with every dollar that they have income is all of our greatest wealth building tools, a lot of us focus on a UN.

291

00:49:27.300 --> 00:49:39.510

Lisa Vander: A lot of us focus on gathering assets and how do I, how do I build my a UN book of business and then you'll inevitably have prospects say I don't have enough money i'll come back to you and i'm rich and, like my response like Okay, so let me know when you win the lottery like.

292

00:49:40.710 --> 00:49:45.480

Lisa Vander: income is all of our clients and our greatest wealth building tool.

293

00:49:46.650 --> 00:49:54.360

Lisa Vander: So all of the messaging that I have with our optometry clients, is how do we harness the income that your practice and enough time to practice is two things.

294

00:49:54.630 --> 00:50:06.120

Lisa Vander: it's a conduit for cash flow and it's an asset, on your balance sheet, how do we use the conduit of cash flow to grow net worth outside the practice, while at the same time, growing this asset, so that when there is an eventual exit.

295

00:50:06.600 --> 00:50:12.210

Lisa Vander: You have you've extracted Max value of that asset to ultimately live life on purpose and solve for joy.

296

00:50:13.800 --> 00:50:18.630

Lisa Vander: Is their current advisor saying that's my example I hope that i'm that me sharing that.

297

00:50:19.230 --> 00:50:26.520

Lisa Vander: Can plant some seeds no pun intended here, I guess, based on what I was doing with my with our ideal clients, how can you how can you shift your messaging.

298

00:50:27.240 --> 00:50:34.710

Lisa Vander: to your prospects to insert the idea that you know something that they don't know or that



they haven't thought of.

299

00:50:35.700 --> 00:50:43.080

Lisa Vander: And you can proactively plan for things that haven't already happened to dan's point hey have you thought about the stock split coming up.

300

00:50:43.560 --> 00:50:57.210

Lisa Vander: Oh, does that affect like proactively and preemptively having those conversations that is what separates the premium milk that's what makes you different that's what makes you weird and that's what you're solving for as advisors in in your niche.

301

00:51:00.330 --> 00:51:10.860

Lisa Vander: I think we did things a little bit differently, I think you flew it man you're good it's good keep going, but basically the the the point that I want to make here on these two slides is there's.

302

00:51:12.150 --> 00:51:12.630

Lisa Vander: From a.

303

00:51:15.090 --> 00:51:27.330

Lisa Vander: rate by section or a a an either or path that you can go down some advisors thing I need to burn the ships and I need to fire all my clients and I only need to work, I need to just kind of start over.

304

00:51:27.870 --> 00:51:31.680

Lisa Vander: I didn't do that Oh, you did that either I mean you, you had your existing I mean.

305

00:51:32.220 --> 00:51:38.400

Lisa Vander: There are some advisors that will truly do that they'll be able to sell their book of business and truly build it new from the ground up.

306

00:51:39.240 --> 00:51:46.710

Lisa Vander: aggressive, I will say, on the other side of it it's a lot easier if you choose that path, because now you don't have you don't have to solve.

307

00:51:47.160 --> 00:51:53.550



Lisa Vander: For your generic clients, we, on the other end did the steady transition, where we had our existing clients.

308

00:51:54.090 --> 00:52:04.860

Lisa Vander: We eventually got to the point where we said no to anybody that didn't have OD after their name, and now we say no to anybody that does that has anybody that doesn't have OD and business owner.

309

00:52:06.090 --> 00:52:14.640

Lisa Vander: As part of who they are that refined process is going to be something that you're gonna have to go through, and again there's no blanket statement there's not that you're just gonna have to do the math on it, yes pristine.

310

00:52:24.780 --> 00:52:28.620

Lisa Vander: Like how many how many niche clients that I had before I knew that I had a niche right right.

311

00:52:32.100 --> 00:52:33.600

Lisa Vander: yeah I have to.

312

00:52:42.870 --> 00:52:45.000

Lisa Vander: pay no attention to the person behind the curtain.

313

00:52:48.720 --> 00:52:49.200

You know.

314

00:52:50.580 --> 00:52:52.110

What are.

315

00:52:54.120 --> 00:52:54.660

You know.

316

00:52:58.320 --> 00:52:59.070

Lisa Vander: ready fire aim.



317

00:53:00.240 --> 00:53:08.310

Lisa Vander: I mean it's it's a variation of oh i'll come see you when I win the lottery like that's never going to happen unless we start somewhere yeah yeah.

318

00:53:09.630 --> 00:53:11.070

Lisa Vander: yeah I mean I had to.

319

00:53:14.250 --> 00:53:18.000

When you're thinking about this obviously there's the money side of it but.

320

00:53:19.770 --> 00:53:25.680

Lisa Vander: really think about that right, what do you mean by that so we started thinking of your pitch to people that.

321

00:53:27.060 --> 00:53:28.170

wasn't really something you just like.

322

00:53:29.340 --> 00:53:30.900

Lisa Vander: hold on go ahead.

323

00:53:31.980 --> 00:53:45.300

Lisa Vander: we're going to shift into Q amp a little bit here so because we're basically at the end, anyway, so, for your niche was it something that you, you look to your book and you said okay there's two of them was it something you just kind of said I really like working with those.

324

00:53:46.440 --> 00:53:55.290

Lisa Vander: And then you know, like don said, you know the money follows passion yeah so I mean was there anything more than that, when you were kind of deciding who to work with and how to do it.

325

00:53:59.250 --> 00:54:08.220

Lisa Vander: So I didn't say this but um what's funny is i've been working with my niche consistently for 48 months or less than 48 months, you know, three years and whatever this is.

326



00:54:09.480 --> 00:54:19.560

Lisa Vander: If you were to take an asset map my that's my core stack right and take a template of the average household of Google that I work with is just a mirror image of.

327

00:54:20.010 --> 00:54:26.070

Lisa Vander: My own personal finances age network and everything and saving habits that's because to your point Garrett.

328

00:54:26.460 --> 00:54:38.940

Lisa Vander: I was really jazzed about saying hey What if you wanted to build a million dollars and you had zero What would it take right and if I was sitting in your shoes knowing your COMP knowing your success, knowing.

329

00:54:40.050 --> 00:54:48.480

Lisa Vander: Your habits, this is what I would do when I tell it to the engineer don tell me how much it is and we will get that to you when i'm talking to the creatives that YouTube.

330

00:54:49.080 --> 00:54:52.410

Lisa Vander: Does that mean, I can buy this House and so forth, so it's.

331

00:54:52.980 --> 00:55:00.990

Lisa Vander: i've really aligned my passion for personal investing with the clients I work with so that's where I experienced that exponential growth because all I was doing.

332

00:55:01.290 --> 00:55:04.020

Lisa Vander: was just doing what I love and I just got lost in my work.

333

00:55:04.440 --> 00:55:15.660

Lisa Vander: I wasn't worried about the numbers, when I saw the numbers, I was like holy cow, I think I think i'm good at this, so what happens if I take it seriously, then I hire a va I hire a content writer, I know all that stuff so i'm just i'm just doing nothing but talking to class.

334

00:55:17.010 --> 00:55:17.490

Lisa Vander: One or two.



335

00:55:18.780 --> 00:55:19.740

Lisa Vander: For me, my.

336

00:55:20.820 --> 00:55:31.080

Lisa Vander: Mind evolved mine was more so, along the lines of I realized from a financial standpoint what some of those practices were doing in revenue and income.

337

00:55:31.650 --> 00:55:44.280

Lisa Vander: And they fit the bill of what an ideal what an ideal client look like and that very, very, very quickly, for me, evolved in just feeding my own personal urge I love business I love working on businesses, I love business more than I love financial planning.

338

00:55:45.360 --> 00:55:50.100

Lisa Vander: candidly if I never do a financial plan again i'd be the happiest advisor world and that's why I have john on the team.

339

00:55:50.700 --> 00:56:02.790

Lisa Vander: I won't really touch the money anymore I don't care to that's not my best value to our clients into the business it's why i'm here limitless I love business and I love working on businesses and I love the business of optometry so that evolved.

340

00:56:03.300 --> 00:56:07.980

Lisa Vander: And that's that's what kind of fuel that fire for me to now have impact at scale in the field of optometry.

341

00:56:08.880 --> 00:56:14.730

Lisa Vander: Okay question from Elliot online I have many clients that aren't in my niche but I love helping are profitable and want to keep.

342

00:56:15.120 --> 00:56:21.960

Lisa Vander: How do others handle having your public facing marketing focused on a niche that some clients aren't a part of that was the one mistake that I made.

343

00:56:22.740 --> 00:56:31.230



Lisa Vander: I made many but um, let me make clinic quanta or clarify that a little bit more, let me, let me become a little bit more surgical with that admission of guilt or admission at fault.

344

00:56:31.830 --> 00:56:36.090

Lisa Vander: The mistake that I made in transitioning publicly out publicly facing.

345

00:56:36.420 --> 00:56:49.590

Lisa Vander: The brand the website 2020 money, I did not effectively communicate with our existing clients, the decision that it was making it cost me one relationship decent relationship is about a \$700,000 account and I found out that way every advisor loves to find out, they get the cat notice.

346

00:56:51.510 --> 00:56:54.090

Lisa Vander: called the client had the conversation or former client.

347

00:56:54.480 --> 00:57:00.360

Lisa Vander: And they said, Adam we've seen what you're doing in the website we've seen some of the messaging and they were retired client.

348

00:57:00.480 --> 00:57:07.590

Lisa Vander: And we just feel like we're not the best fit for you anymore, we wish you all the best, but we're going to we found another advisor that works with retirees and we're going to work with them.

349

00:57:09.300 --> 00:57:18.660

Lisa Vander: My after licking my wounds a little bit my my response, then, was to send out messaging a little bit more proactively to our existing client base the resounding feedback that I got.

350

00:57:19.020 --> 00:57:24.480

Lisa Vander: Was we're really happy for you we're excited for what you're doing in your business just don't forget about us.

351

00:57:25.890 --> 00:57:36.090

Lisa Vander: That was my so to elliot's point you can do that it for Michael and we had, I think, at the time 70 ish households that we were working with.

352



00:57:36.870 --> 00:57:48.000

Lisa Vander: That we're not optometrists right, we have to that we're within my niche so talk about imposter syndrome right building out this massive website of we we help upon which is playing life on purpose all two of them.

353

00:57:50.160 --> 00:57:50.370

Lisa Vander: Right.

354

00:57:57.990 --> 00:58:05.550

Lisa Vander: I know I have the email compliance right um i'll see if I can find it into Adam form it was probably five and a half pages long.

355

00:58:06.480 --> 00:58:18.360

Lisa Vander: refined down to three after four hours of editing and somewhat kidding um I don't remember exactly, but it was a it did convey that message that we're making this shift we're seeing impact I.

356

00:58:19.710 --> 00:58:26.040

Lisa Vander: Honestly, I don't remember, but it was this messaging just because we're making this shift on the outside looking in.

357

00:58:26.310 --> 00:58:33.480

Lisa Vander: we're not compromising the conditions of how we've shown up and delivered value to over this time and our business model for our existing clients is not going to change.

358

00:58:33.810 --> 00:58:42.120

Lisa Vander: In that fed in as we talked yesterday about the service model that we have in our firm why we've created a base plus service model right the base service model.

359

00:58:42.600 --> 00:58:51.960

Lisa Vander: is to cornerstone reviews surge right and that handles not only our existing niche clients their cornerstone big picture 30,000 foot view.

360

00:58:52.350 --> 00:59:04.020

Lisa Vander: plan review, but it also helps us deliver significant value to our non optometry clients and



then the plus part of that service model or the little micro interactions that we have with our ot practice owners.

361

00:59:04.350 --> 00:59:12.150

Lisa Vander: And we do that, via loom the other communication utilizing other pieces of technology so hopefully that better sure sure yep.

362

00:59:14.040 --> 00:59:15.240

Lisa Vander: To that question, I was.

363

00:59:16.560 --> 00:59:24.630

Lisa Vander: I know versus waiting patiently Okay, I thought you answer that question really good and I forgot the question, what do you do about not about non.

364

00:59:25.230 --> 00:59:42.330

Lisa Vander: Marketing like creating that messaging publicly facing and then having your non niche clients see that outward messaging of we only work with lawyers or what okay yeah so my current book of business of gamblers is 45 to 50% the fluctuation is because of the market.

365

00:59:43.800 --> 00:59:51.990

Lisa Vander: The ones who were grandfathered the ones before my niche they see my website and they say, so this is how you help big techno hmm i'm like yeah.

366

00:59:52.650 --> 01:00:02.970

Lisa Vander: And this is the process of using for us yeah awesome that's the response if you go to my website I literally have my brochure of how I service big tech.

367

01:00:03.390 --> 01:00:14.010

Lisa Vander: Our clients are different So are we, and I explained it to the point where, even if you're not big tech, you know my process, so my existing clients, because I don't I don't prospect any non google's anymore.

368

01:00:14.760 --> 01:00:23.940

Lisa Vander: So the idea is wow so we get your process and we're we're thrilled that this is what works for Google, because their perception of Google rightfully so is their their.



369

01:00:24.660 --> 01:00:33.510

Lisa Vander: Their dynamic they're leading and their lack of a better word honored that i'm using the same process to assist them and their financial planning.

370

01:00:44.910 --> 01:00:51.630

Lisa Vander: Berg did you still have a question okay bunch of questions but i'll i'll go quick first number six or fan just for leads that.

371

01:00:54.840 --> 01:01:03.720

Lisa Vander: you're charging a onboarding fee a monthly fee and an ATM fee that's a firm is that right Okay, and then um can you rank.

372

01:01:04.170 --> 01:01:06.000

Lisa Vander: Where you source your leads from.

373

01:01:06.420 --> 01:01:08.670

Lisa Vander: yeah um so just real quick where.

374

01:01:08.880 --> 01:01:21.000

Lisa Vander: As you rank them as far as you know, the most effective to the least effective Where would you say it's it's a three prong are the top three places that we get and we we saw said in acuity when they book an appointment, they have to click how they found us right it's.

375

01:01:21.510 --> 01:01:30.300

Lisa Vander: I don't want to say evenly split but it kind of comes in waves 2020 money i'm active and provide advice in Community Facebook Community called OD on finance.

376

01:01:30.720 --> 01:01:39.300

Lisa Vander: And the right it's basically three or four depending on the season, the writing that I do for review of optometric business i've had a standing column there for the better part of five years.

377

01:01:39.750 --> 01:01:46.380

Lisa Vander: Or the speaking, that I do I speak at all the national tama tree conferences, I get paid to



377 speak, they source me for those presentations and that.

378

01:01:46.590 --> 01:01:57.240

Lisa Vander: That much more of an ebb and flow right i'll get we'll get a decent number of inquiries after speaking and then that trails off alright, so the podcast writing speaking up so all those you're saying, or the greatest sources of.

379

01:01:57.660 --> 01:02:01.380

Lisa Vander: Perfect for you and i'm done and you get your first Google coin.

380

01:02:02.640 --> 01:02:04.020

Lisa Vander: how'd you get your first Google client.

381

01:02:07.020 --> 01:02:08.250

Lisa Vander: seo I 2008.

382

01:02:13.290 --> 01:02:21.030

Lisa Vander: When I appreciate your question to Adam because you've monetized like three streams of income right podcast and so forth, so if I was sitting here.

383

01:02:21.690 --> 01:02:27.630

Lisa Vander: The foremost what's happening right i'm thinking oh crap I do a podcast I gotta do speaking events and so forth, no, no, no, no, no, no.

384

01:02:28.080 --> 01:02:37.830

Lisa Vander: that's where for me at least the discipline comes in, no, no, I want to focus on search and niche first, so I can really sharpen my acts and just kill it that way.

385

01:02:38.190 --> 01:02:53.040

Lisa Vander: that's how I get my stream of income so don't feel like if it works for Adam it's it unless it really resonates with you don't feel compelled to do it because, even though i'm literally like wow this this this item is monetizing his his life, you know.

386

01:02:54.090 --> 01:03:00.450



Lisa Vander: i'm going to enjoy that photo for five minutes and then i'll go off to my work i'm having the same impact i'm just doing differently.

387

01:03:01.830 --> 01:03:09.300

Lisa Vander: yeah yeah but I searched the podcasts like I won't record another podcast until the beginning of June, one of the thing is obviously.

388

01:03:12.300 --> 01:03:18.150

Lisa Vander: So you guys both have kind of two in game strategies to I know dawns on a 10 year sprint right.

389

01:03:18.930 --> 01:03:27.570

Lisa Vander: And then, Adam I mean you just brought on junior junior advisor but advisor to handle all new guys meet advisor yeah so is that something that kind of came.

390

01:03:28.020 --> 01:03:33.390

Lisa Vander: Just from the amount of traction you're getting with niche or is that something that you kind of thought about.

391

01:03:33.900 --> 01:03:43.740

Lisa Vander: Okay that's the goal, I want to get out of the business or not now that evolved to and we've got the flywheel going right now, one of my favorite books is flywheel it's the monograph too good to great by Jim Collins.

392

01:03:44.100 --> 01:03:51.720

Lisa Vander: And it just talks about identifying six or less strategies or decision points in your business that.

393

01:03:52.530 --> 01:04:01.260

Lisa Vander: play off one another Amazon has a flywheel Google has a flywheel right that's this theory, so the flywheel that I created the podcast is one of those and we've got that momentum going.

394

01:04:01.710 --> 01:04:07.560

Lisa Vander: My mission is to have impact that scale, both in the advisor community as well as in the optometry Community so because of that.



395

01:04:08.040 --> 01:04:12.090

Lisa Vander: The forcing mechanism that I heard that the fork in the road do I.

396

01:04:12.630 --> 01:04:20.100

Lisa Vander: develop a solicitor's license or create a solicitor's agreement and then refer out all of these ideal prospects that are reaching out to us wanting to work with us.

397

01:04:20.580 --> 01:04:31.470

Lisa Vander: Or do I scaled the business i've made the decision right now to scale we're going to be hiring probably two more people this year to help with the growth in the practice, so it my point in that that's my experience.

398

01:04:32.940 --> 01:04:37.080

Lisa Vander: The only thing that's going to be constant in your business as we've all this niche is change.

399

01:04:38.250 --> 01:04:39.330

Lisa Vander: Be prepared for that.

400

01:04:40.350 --> 01:04:49.380

Lisa Vander: Be cognizant of that and just write one of our tenant phrases that we have here in limitless is when the vision is clear the decisions are easy.

401

01:04:50.160 --> 01:04:58.080

Lisa Vander: and make them easy to execute but my point and that is my vision actually changed be prepared for that that it can happen it's okay that it happens It evolves.

402

01:04:58.740 --> 01:05:08.190

Lisa Vander: But know that those that that might change your decision know your numbers, especially through niches helps me get really clear my business too so i'm glad you remember the 10 year sprint that's like my lingo what my colors.

403

01:05:09.240 --> 01:05:19.230

Lisa Vander: i'm super lean in my expenses i'm a deliberate solo practitioner, I have a va and I have a



content writer, because what are the two things I don't want to do, and the idea is this everything from here on in.

404

01:05:20.430 --> 01:05:25.080

Lisa Vander: it's all profit, because my expenses are low, I just pay myself reasonable compensation keep the IRS away from me.

405

01:05:25.350 --> 01:05:35.250

Lisa Vander: And everything else is great if I hit my stride six eight clients per year fantastic if I don't I'll live I'm good because I'm still meeting with my with my goodness, and that's what stuff I enjoy.

406

01:05:36.330 --> 01:05:50.040

Lisa Vander: And I challenge my peers, to really make it a point to align what you love doing with your niche because when you do that that's that's, in my opinion, when you really experience and feel keyword feel exponential growth.

407

01:05:50.430 --> 01:05:56.940

Lisa Vander: Because my my second year, I had the same experience right my revenue off the charts but I felt burnt out because I wasn't in the right mindset.

408

01:06:00.300 --> 01:06:08.250

Lisa Vander: I wanted to get out of the game when I'm 50 I'm 42 now and I figured based on my sleeping habits, like my goodness that's that's my I have a magic number based on how much I saved on my.

409

01:06:08.490 --> 01:06:19.920

Lisa Vander: average rate of return, and I could walk away from the game Carl Richards will tell you that's wrong yeah cuz now I'm gonna be bored my wife's gonna say what are you gonna do I'm gonna own a mom and pop up mom and pop shop so that's what I'm gonna do.

