

LIMITLESS Coaching Call Transcript

JULY 25TH, 2022
LEADERS COACHING CALL
IMPLEMENTING WITH TEAMS

128

00:18:40.980 --> 00:18:43.800

Stephanie Bogan: Great you guys want to talk about implementing with teams today.

129

00:18:45.660 --> 00:18:56.430

Stephanie Bogan: This is more the invisible ink part of the conversation, but before we jump into that I want to start with some wins from between our last call and this one so i'm going to pick.

130

00:18:57.360 --> 00:19:04.890

Stephanie Bogan: let's see let's do three just in the interest of time do we who's got a big one, to share something positive that has happened progress.

131

00:19:05.730 --> 00:19:06.600

Jarrod and Tiffany: Jared does.

132

00:19:07.230 --> 00:19:08.880

Stephanie Bogan: Right Jared and then Isaac.

133

00:19:10.230 --> 00:19:13.140

Jarrod and Tiffany: Jared and 45 days off in the last.

134

00:19:14.550 --> 00:19:15.570

Stephanie Bogan: Jared that is.

135

00:19:16.860 --> 00:19:17.490

Stephanie Bogan: Oh, my God yes.



136

00:19:18.360 --> 00:19:24.420

Jarrod and Tiffany: And super limitless and we're still here with all the clients and all the things so it's really.

137

00:19:24.450 --> 00:19:35.220

Stephanie Bogan: Nobody died look at that I remember when I first made this was my first goal my goal was to go on vacation for a month like literally check out like to check out.

138

00:19:36.060 --> 00:19:47.400

Stephanie Bogan: And it's a really good thing that I did that, because they came back and very shortly thereafter had a premature baby and had to be off for a month and my business still ran while being acquired, it was super fun.

139

00:19:47.850 --> 00:19:58.620

Stephanie Bogan: They do not recommend that if you can avoid it, but I came back to one Manila envelope, I was like this envelope will contain anything that requires my attention that no one else can do they were two pieces of paper in it.

140

00:19:59.310 --> 00:20:03.420

Stephanie Bogan: After a month and I was like yes, and then the universe was like let's test that theory.

141

00:20:06.450 --> 00:20:13.080

Stephanie Bogan: But I have to tell you, for me it was without questioning a watershed moment, where I was like holy shit.

142

00:20:14.160 --> 00:20:22.260

Stephanie Bogan: I can literally leave my business and be in this hospital with this baby all day every day for months on end.

143

00:20:23.640 --> 00:20:31.020

Stephanie Bogan: And it runs like I think the team brought me like a folder once a week where i'd be like Okay, I think i'm coherent, I will try to sleep for four hours and.

144

00:20:31.530 --> 00:20:40.590



Stephanie Bogan: This is it this folder and the place worked beautifully now at that point in our evolution, was it going to grow considerably no.

145

00:20:41.370 --> 00:20:50.880

Stephanie Bogan: that's one of those leverage gaps that we have to fill but could we maintain the ship in a sustainable way for an extended period of time absolutely we could and.

146

00:20:51.120 --> 00:20:56.400

Stephanie Bogan: Quite honestly, you all, are in a much better spot than we are with regard to that because the nature of your.

147

00:20:56.760 --> 00:21:07.110

Stephanie Bogan: relationship is recurring and it's based on a very repeatable system coaching in as well, but just the economics of it, and the way that people it's very different.

148

00:21:07.440 --> 00:21:13.080

Stephanie Bogan: So, once you get that core base of clients set it's a really incredible business our goal.

149

00:21:13.650 --> 00:21:23.820

Stephanie Bogan: is to implement those changes which we're going to talk about today so Jared that's incredible when we think about that first conversation about accountability gap, a couple of years ago, and then we fast forward to.

150

00:21:24.120 --> 00:21:36.870

Stephanie Bogan: Based on the hard work that you and tiffany have done with the team really pointed as beauty of this conversation, for it to be right after that work has really put you in a position to do that and come back with what looks to be a smile on your face.

151

00:21:37.920 --> 00:21:40.560

Jarrold and Tiffany: smile on my face a little bit of tams.

152

00:21:41.700 --> 00:21:47.520

Stephanie Bogan: Only because you spent 45 days with your kids right, I was like three weeks increase with you guys and rocks is awesome.



153

00:21:49.680 --> 00:21:51.240

Jarrold and Tiffany: You know, thinking about the.

154

00:21:51.330 --> 00:22:01.590

Jarrold and Tiffany: Power of what doing all of this work with teams means is that you know I can take that time and tiffany can take that time and we're counting summers left with our kids.

155

00:22:01.950 --> 00:22:10.710

Jarrold and Tiffany: You know, going into this one I knew I had 12 summers left we just had an awesome one and now we're down to 11 and so it's like we're going to make those moments count but.

156

00:22:11.070 --> 00:22:22.080

Jarrold and Tiffany: doesn't work without a team to actually make sure that clients are taken care of and the business runs appropriately and all those things, so I think it's great time to be able to have the conversation today.

157

00:22:22.800 --> 00:22:31.710

Stephanie Bogan: Well, we think about the intensity of us as founders right in the driving and the striving, the feeling like everything's gotta get done yesterday.

158

00:22:32.370 --> 00:22:41.880

Stephanie Bogan: And right Jared has that lens Christie rains has it I years ago started like how many Christmases and summers do I have with my kids and it was suddenly like seven.

159

00:22:42.660 --> 00:22:53.340

Stephanie Bogan: Six this year with Parker we're down to for next year will be three and so when I think about all those ideas things I want to implement oh it's things that I have to fix that i'm like.

160

00:22:54.210 --> 00:23:02.880

Stephanie Bogan: In service of what and, at the cost of and so it's not that our businesses aren't important but it's how we really integrate those two facets of our life.

161

00:23:03.300 --> 00:23:16.590

Stephanie Bogan: In a way, that works, but also in a way that feels good so one of the great things about



this conversation is, the more we can create leverage with our team, the more we get that kind of headspace I think you had a win to, I think.

162

00:23:20.220 --> 00:23:30.420

Isaac Presley: I do, I finally finally Finally, this equity transaction that we've been talking about doing for ever, it feels like is is done.

163

00:23:30.900 --> 00:23:42.600

Isaac Presley: We officially closed on July 1 like the the loan financing and all that stuff went through I think last week in the money exchanged hands and all that stuff so feels good we announced it to the team.

164

00:23:43.470 --> 00:23:55.200

Isaac Presley: In in combination with two new shareholders buying in last week, which went well was well received and all that and we're sending out the notice to clients this week so.

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00:23:55.980 --> 00:24:03.840

Isaac Presley: I don't know if it feels good for multiple reasons, not the least of which is just being done and getting getting on to the next thing.

166

00:24:05.250 --> 00:24:09.510

Stephanie Bogan: exciting that's awesome whoa everybody give Isaac hi fi that's a big big deal.

167

00:24:10.980 --> 00:24:14.100

Stephanie Bogan: Moving the needle you guys all right, Neil, did you have one two.

168

00:24:16.680 --> 00:24:19.080

Stephanie Bogan: Or was that just your enthusiasm for Isaac earlier.

169

00:24:19.380 --> 00:24:22.200

Neal Albritton: It was my enthusiasm, but now he put me on the spot or make something up.

170

00:24:23.940 --> 00:24:27.720

Stephanie Bogan: Does anyone have a better than meals made up made up on the spot when.



171

00:24:31.260 --> 00:24:40.080

Neal Albritton: No well my made up on the spot, is, I had a conversation with my sister and things worked out so she's gonna actually leave and find something that she's going to be.

172

00:24:40.620 --> 00:24:49.320

Neal Albritton: Fulfilling and happy for her an egg fact she's had her, she leaves in a couple minutes she's gonna head out to her third interview with the St Louis symphony so.

173

00:24:53.880 --> 00:25:03.390

Stephanie Bogan: yeah and at least as Neil, as you communicate it to me just her energy and her being are lighter and more joyful and.

174

00:25:03.930 --> 00:25:12.210

Stephanie Bogan: nail it feels like you're processing it in a really constructive and healthy women is obviously a shift for you on the firm but how what you want to tell everybody how you and the team are taking it.

175

00:25:12.870 --> 00:25:15.690

Neal Albritton: um Well, this is an iced tea, this is actually Samoa joe's Bourbon.

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00:25:15.840 --> 00:25:16.110

So.

177

00:25:19.710 --> 00:25:20.820

Stephanie Bogan: Like i'm feeling great.

178

00:25:22.620 --> 00:25:32.700

Neal Albritton: Now we're taking all right, like it was a hard conversation but it's it's good for everyone and we're using it as an opportunity, so once Kate does leave sometime in August.

179

00:25:33.180 --> 00:25:40.770

Neal Albritton: Then we're going to take our time and figure out what we want everything to look like we're going to keep the same vision, the same plan for might take a different road to get there.



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00:25:41.700 --> 00:25:47.760

Neal Albritton: But we'll figure it out and we're going to use it as an opportunity to make this one of the best things that could have ever happened to our business yeah.

181

00:25:48.120 --> 00:25:56.130

Stephanie Bogan: And that's the frame that we, I think we really want got to and want to get to which is, if you are able to sit in a space of addressing those.

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00:25:56.130 --> 00:25:57.840

Stephanie Bogan: uncomfortable conversation.

183

00:25:57.900 --> 00:26:02.340

Stephanie Bogan: They are ultimately even when it's not easy, they are in service of.

184

00:26:03.120 --> 00:26:14.340

Stephanie Bogan: Everyone engaged in that process, Kate will be happier Neil, and the team will be able to make sure that every person and resource on that team is super aligned with no energy being spent on.

185

00:26:14.790 --> 00:26:17.520

Stephanie Bogan: Right not quite clicking or fitting so.

186

00:26:18.060 --> 00:26:30.690

Stephanie Bogan: In the end, the things that are the hardest ultimately can sometimes be the things that are best for the business and that's the frame that we try to get to what would it take for this to be the best thing that happened, which is sometimes a really hard question to hear.

187

00:26:31.170 --> 00:26:39.450

Stephanie Bogan: But it can get those gears of your mind thinking about what where is the opportunity in this, which is a much more positive and empowered view then.

188

00:26:39.930 --> 00:26:47.280

Stephanie Bogan: Oh crap we are going to have to deal with this, and that was aware Neil is coming



from the first place, because he he really brought the conversation space so.

189

00:26:47.670 --> 00:26:56.100

Stephanie Bogan: Neil, I really want to commend you for having the level of clarity that you had for acting on it so quickly after some of those conversations that really surfaced it.

190

00:26:56.550 --> 00:27:07.050

Stephanie Bogan: And for doing the really hard work of acting in integrity and service of your sister your team and your business that is not always easy work to do so, I just want to give you kudos for that.

191

00:27:08.940 --> 00:27:16.470

Stephanie Bogan: All right, we've all had to be sit in those spaces and they're hard and they're uncomfortable, but when we do that work it tends to work out better for everyone.

192

00:27:17.160 --> 00:27:24.750

Stephanie Bogan: So I think that's a good segue into today's conversation with me tiffany and Jared really talking about as we implement the teams.

193

00:27:25.110 --> 00:27:34.230

Stephanie Bogan: we've talked a lot about the structure and the meetings and the projects and the quarterly business reviews and the priorities, but we all know, there's like this invisible ink.

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00:27:34.800 --> 00:27:45.510

Stephanie Bogan: That sits in between all those structures sort of the self reflection and the strategy of conversation and how do we create spaces, that we can surface these kinds of issues.

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00:27:45.840 --> 00:27:53.760

Stephanie Bogan: and create accountability and manage momentum and move things along so as we kick off we thought we would start with the question of.

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00:27:54.180 --> 00:28:00.750

Stephanie Bogan: What is your biggest challenge or frustration when it comes to implementing projects and making progress with your team.

197



00:28:01.680 --> 00:28:11.160

Stephanie Bogan: And just we have some more time to talk about this because we're going to break into groups, a little bit later i'm going to ask you to drop this in the chat but i'm going to ask everyone on the call to answer it.

198

00:28:12.630 --> 00:28:17.700

Stephanie Bogan: What is your biggest frustration or challenge when it comes to implementing projects and making progress with your team.

199

00:28:29.280 --> 00:28:32.520

Stephanie Bogan: I once had a client enter this question with I don't know why they don't have.

200

00:28:32.550 --> 00:28:34.440

Jarrod and Tiffany: What can they have a crystal ball and I was like.

201

00:28:34.500 --> 00:28:40.590

Stephanie Bogan: Well, that is a very special skill set for which you're going to need to pay an awful lot of money, but if you're willing.

202

00:28:41.550 --> 00:28:44.100

Stephanie Bogan: See breaking the way things always been done.

203

00:28:44.400 --> 00:28:54.720

Stephanie Bogan: need to be the one to drive it forward right, I have to have my foot on the gas is a very common complaint if you're in the car and you're driving and you're pointing your foot on the gas everything's great, but if you get out.

204

00:28:55.350 --> 00:29:03.690

Stephanie Bogan: Get all shuts down let's see bounce a communicating big picture, with the details being time oriented right being the only one moving things forward.

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00:29:04.170 --> 00:29:17.220

Stephanie Bogan: Most of these in some way, are going to deal with two things momentum right, I have to push or personal responsibility someone is not doing something.



206

00:29:17.760 --> 00:29:24.180

Stephanie Bogan: And if the process breaks down we just go to the process we fix the process right Kim and the process works.

207

00:29:24.630 --> 00:29:31.740

Stephanie Bogan: Both people were that simple hey there's a breakdown it's like to communicate the process can we agree, you will fix this yes done if it were that easy.

208

00:29:32.340 --> 00:29:45.120

Stephanie Bogan: We don't need five times bigger, we have to really manage that space between people process and platforms and that momentum and that kind of personal accountability so as you think about this.

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00:29:45.510 --> 00:29:53.580

Stephanie Bogan: We thought it would be good to really go through the conversation through one of the lenses that came up at our leaders retreat I think most of you had left tiffany.

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00:29:54.030 --> 00:30:02.130

Stephanie Bogan: Neil Joe and I were sitting around having a conversation and talking about their practices and whiteboarding I can't even remember, and we were talking about sort of.

211

00:30:02.940 --> 00:30:14.820

Stephanie Bogan: You know, balancing the wheel of life is a very common thing in coaching right, how are you balanced in your life and what we're really trying to create what each of you want in some form or fashion, if you look at your big wise.

212

00:30:15.600 --> 00:30:24.900

Stephanie Bogan: Is the leverage, because that leverage creates space and that space with reliability and capital equals freedom.

213

00:30:25.950 --> 00:30:35.850

Stephanie Bogan: space, by the way, without reliability and capital if Jared had gone on vacation for 45 days and you didn't have that reliability and didn't have that capital would it have been as easy and joyful.



214

00:30:36.600 --> 00:30:46.890

Stephanie Bogan: know all the awesomeness of jerry's vacation would not have been awesomeness right so leverage is can we put those tools people process and platform in place.

215

00:30:47.940 --> 00:30:56.070

Stephanie Bogan: Reliable is can we build the systems and structures and the accountability mechanisms to make sure that they work, so I want you to take out a piece of paper.

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00:30:56.970 --> 00:31:05.850

Stephanie Bogan: I want you to draw your version of this circle you don't have to write all the words you can just imagine them in the middle is 00 is you have zero leverage.

217

00:31:06.690 --> 00:31:15.270

Stephanie Bogan: tiffany is the only one that can do this right or she is the one doing it, I will take back the only one who can is the one doing Liz.

218

00:31:15.780 --> 00:31:25.680

Stephanie Bogan: Where there are places that you're the one doing things 10 is you are completely leveraged right at the level that I just look at it sign off away we go.

219

00:31:26.970 --> 00:31:41.760

Stephanie Bogan: Right So where are you in each area compliance financial planning business management and then I want you on that line to plot the just a dot where you are a scale of one to 10 somebody give you just a minute to do that.

220

00:31:48.090 --> 00:31:57.810

Stephanie Bogan: tiffany and Jared I should have had you do this, a couple of years ago and then fast forward so we should just have you do what what it felt like back then version, it would be like all zeros right like.

221

00:31:57.870 --> 00:32:02.910

Jarrod and Tiffany: I can't breathe very small circle, a couple years ago it's much bigger and not.

222

00:32:03.000 --> 00:32:13.740



Jarrold and Tiffany: Quite uniform, but it seems like mean trend that's happening right now, or like the little codes where it's like he's a 10 but you know he wears green on Wednesdays.

223

00:32:13.770 --> 00:32:14.760

Jarrold and Tiffany: type of thing like I was just.

224

00:32:15.180 --> 00:32:15.450

Like.

225

00:32:17.310 --> 00:32:20.340

Jarrold and Tiffany: i'll be your tenant business development, but i'm doing operations.

226

00:32:24.930 --> 00:32:26.310

Stephanie Bogan: All right, he's everybody kind of.

227

00:32:28.290 --> 00:32:29.400

Stephanie Bogan: Your first stab at it.

228

00:32:31.830 --> 00:32:34.110

Stephanie Bogan: Now I want you to connect your dogs.

229

00:32:37.050 --> 00:32:40.140

Stephanie Bogan: Like like you're drawing right your contiguous line.

230

00:32:48.960 --> 00:32:50.790

Stephanie Bogan: Once you've done that pulled it up.

231

00:32:53.850 --> 00:32:55.140

Stephanie Bogan: So that we can all see it.

232

00:33:04.200 --> 00:33:05.160

Stephanie Bogan: Can I see that again.



233

00:33:07.380 --> 00:33:07.740

Stephanie Bogan: yeah.

234

00:33:09.390 --> 00:33:12.810

Stephanie Bogan: looks a little bit like a spider web or a squishy snowflake.

235

00:33:14.010 --> 00:33:14.700

Stephanie Bogan: snowflake.

236

00:33:18.540 --> 00:33:19.320

Stephanie Bogan: Who else has one.

237

00:33:20.040 --> 00:33:20.460

role.

238

00:33:22.920 --> 00:33:25.260

Stephanie Bogan: there's loses okay so.

239

00:33:27.540 --> 00:33:30.540

Stephanie Bogan: It looks a little bit like an asteroid or space star.

240

00:33:32.820 --> 00:33:34.380

Stephanie Bogan: You guys getting the idea here.

241

00:33:35.670 --> 00:33:36.900

Stephanie Bogan: David what's yours look like.

242

00:33:40.800 --> 00:33:42.630

Stephanie Bogan: What happens if you connect those dots.

243



00:33:48.600 --> 00:33:50.520

Joe Van Name: Nothing good happens if you collect connect the dots.

244

00:33:50.850 --> 00:33:51.840

Stephanie Bogan: Well it's just.

245

00:33:52.200 --> 00:33:59.910

Stephanie Bogan: So what's really powerful about the exercises when I had Neil and Joe do this, it was literally one of those organic things that just comes up and then I said.

246

00:34:00.960 --> 00:34:02.250

Stephanie Bogan: that's why it feels this way.

247

00:34:04.680 --> 00:34:08.430

Stephanie Bogan: Imagine that you're a wheel and that's your momentum.

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00:34:09.990 --> 00:34:15.150

Stephanie Bogan: Now, if you are a small lifestyle practice and you limitless core principles.

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00:34:15.600 --> 00:34:33.750

Stephanie Bogan: You won't have a big wheel and it might spin relatively fast because you're doing everything, but if you create right consistency you'll have a smoother wheel if you're a 10 or seven or eight and everything we're pretty consistently you're going to have a smooth aroma.

250

00:34:34.950 --> 00:34:39.600

Stephanie Bogan: And so I just thought it was a powerful visual story version of.

251

00:34:40.050 --> 00:34:51.180

Stephanie Bogan: Why the day to day feels the way that it does so, are we keeping it tight, but we're spinning really fast right, you have great small tight teams will operate well that way.

252

00:34:51.690 --> 00:35:02.910

Stephanie Bogan: But the price you pay is that spin big bureaucracy James roll along really smooth sometimes slower than they want right Our job is to figure out what's our version of 10.



253

00:35:03.330 --> 00:35:12.600

Stephanie Bogan: Can you look at the business and identify impact from a leverage perspective, like where can we implement changes.

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00:35:12.900 --> 00:35:20.100

Stephanie Bogan: To bring leverage to me as the function of time, time is your greatest revenue producing asset so managing and leveraging your time.

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00:35:20.730 --> 00:35:30.180

Stephanie Bogan: both personally and professionally is step one and then step two is How does that circle or ripple throughout the organization, so if you're a zero in something.

256

00:35:30.870 --> 00:35:39.510

Stephanie Bogan: And it's really pulling that that your line in you might not get to 10 in the next six months, but you might be able to get to two or three four to five.

257

00:35:40.200 --> 00:35:50.430

Stephanie Bogan: And so, look at those wheels to the lens of how can you start to even things out and smooth out that momentum, because if i'm David and i'm working with the team.

258

00:35:51.600 --> 00:35:57.930

Stephanie Bogan: And I hit that really pointy part on the drawing what kind of energy is required to keep that moving.

259

00:35:59.940 --> 00:36:01.680

Stephanie Bogan: versus if it's a smooth wheel.

260

00:36:02.700 --> 00:36:13.770

Stephanie Bogan: Massive energy means I have to stop it means I have to shift gears It means, I have to fix breakdowns that means I have to talk to people, it means I have to do things that are well below the economic value of my time.

261

00:36:14.700 --> 00:36:20.550



Stephanie Bogan: So our goal is to get really clear where we're sitting on this leverage circle from a strategic perspective.

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00:36:21.360 --> 00:36:32.760

Stephanie Bogan: So that we can create leverage with our teams, whether its operating leverage right compliance business operations advice leverage who's engaging and delivering advice to the clients.

263

00:36:33.150 --> 00:36:41.790

Stephanie Bogan: Growth in marketing leverage via the brand and the sales process and storytelling and advertising like how are we creating leverage.

264

00:36:42.030 --> 00:36:50.580

Stephanie Bogan: So that once you push the wheel, which is all those years, and all the hours you're spending taking over practices was and Isaac.

265

00:36:51.060 --> 00:36:57.840

Stephanie Bogan: Great you're investing a lot of that energy in the form of capital, as you exchange someone else's energy for your finances.

266

00:36:58.320 --> 00:37:04.350

Stephanie Bogan: is how do we take all of the energy David that's been invested in this fly will, over the years.

267

00:37:05.070 --> 00:37:11.670

Stephanie Bogan: and start to soften up that wheel, so that all that energy just starts to move us forward faster.

268

00:37:12.120 --> 00:37:19.800

Stephanie Bogan: Because we're not doing the big colon colon problems, every time we've got to get over one of those homes or pull back.

269

00:37:20.250 --> 00:37:33.810

Stephanie Bogan: To deal with one of those gaps and we all feel those and we hate them as leaders and owners, when you have a vision and you see it, and you know that if we could just get the visas line up, it would be amazing those pullbacks sting.



270

00:37:36.690 --> 00:37:42.510

Stephanie Bogan: And so, if we could smooth out that energy and just get half of it back tiffany Jerry what happens.

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00:37:47.790 --> 00:37:48.660

Jarrod and Tiffany: A lot faster.

272

00:37:49.140 --> 00:37:51.540

Stephanie Bogan: there's a lot faster right you get 45 days off.

273

00:37:52.830 --> 00:38:04.260

Stephanie Bogan: that's what happens now, I know you guys take time, some of you more than others, depending on where you in your maturity cycle with yourselves and your team, we also want to ask ourselves what's the ease and joy, with which we take that time.

274

00:38:05.730 --> 00:38:13.770

Stephanie Bogan: Or we smooth on the inside, when we take it or we managing a bumpy inside putting on a smile for our family, because you know that's the right thing to do.

275

00:38:16.860 --> 00:38:24.990

Stephanie Bogan: says she who has spoken from experience right been there, done that, not the favorite place to operate from right do we ever feel good about that, after the fact never.

276

00:38:26.100 --> 00:38:34.020

Stephanie Bogan: So this is just a visual I would encourage you to dry it print it stick it on your wall look at it every day and remind yourself that you are building.

277

00:38:34.410 --> 00:38:43.980

Stephanie Bogan: Your flywheel like what is your smooth momentum circle look like what's The next step Isaac as you look at growing the firm what's The next step of that team Joe.

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00:38:44.430 --> 00:38:55.440

Stephanie Bogan: For those of you that are like what's the next version of my team look like this is where



you start we don't all those forums and process of level that stuff you guys, but you can run you can build a firm on a cocktail napkin.

279

00:38:55.440 --> 00:39:04.680

Stephanie Bogan: Which is get really clear what the problem is and the problem is, we don't have enough leverage consistently and reliably across the business.

280

00:39:05.820 --> 00:39:09.120

Stephanie Bogan: Now to fix that means we're going to implement changes do we agree on that.

281

00:39:10.230 --> 00:39:13.350

Stephanie Bogan: And for pretty much all of you you're going to implement those changes with the team.

282

00:39:14.100 --> 00:39:19.710

Stephanie Bogan: So if you have this perspective, and we know that's the objective, then we can move into this conversation.

283

00:39:20.250 --> 00:39:24.270

Stephanie Bogan: Right there's your wonky flywheel that thing does not roll well it doesn't feel good.

284

00:39:24.660 --> 00:39:36.690

Stephanie Bogan: So it might work, but the reason it works is because you're filling in all those gaps with your energy you're babysitting you're reminding your task listing for people you're double checking.

285

00:39:37.110 --> 00:39:42.360

Stephanie Bogan: that's energy that is being diluted and distracted from the business so we're going to play a game, are you guys ready.

286

00:39:44.160 --> 00:39:45.600

Stephanie Bogan: tiffany Jared are going to help me.

287

00:39:47.160 --> 00:39:47.610

Stephanie Bogan: All right.



288

00:39:49.290 --> 00:39:56.250

Stephanie Bogan: Jared is Question one oh should I tell you the rules, first I don't want to cheat so here are the rules of the game when you're required to participate.

289

00:39:57.180 --> 00:40:03.930

Stephanie Bogan: I see my picture I believe that he's there in spirit killed watch it later if you can hear us Mike you're welcome to join us so.

290

00:40:04.800 --> 00:40:11.850

Stephanie Bogan: A picture is going to pop up it's going to be two for Jared they're going to ask you a question, you are going to drop the answer in the chat in the interest of time.

291

00:40:12.780 --> 00:40:25.020

Stephanie Bogan: Honest engines circle of trust time your job is to drop your honest answer into the chat the first person to drop their insert into the chat gets a point, there will be a winner.

292

00:40:25.920 --> 00:40:31.740

Stephanie Bogan: You guys ready i'm trying to really appeal to your competitive strength as I push you into the land of vulnerability, are you ready.

293

00:40:32.910 --> 00:40:34.110

Stephanie Bogan: Jared are you ready.

294

00:40:34.680 --> 00:40:35.400

Jarrold and Tiffany: ready.

295

00:40:35.490 --> 00:40:35.910

All right.

296

00:40:38.310 --> 00:40:40.050

Jarrold and Tiffany: Dr any questions right now.

297



00:40:40.080 --> 00:40:40.980

Stephanie Bogan: You have to ask it out loud.

298

00:40:41.640 --> 00:40:42.330

area.

299

00:40:45.270 --> 00:40:52.110

Jarrold and Tiffany: biggest frustration or challenge when it comes to implementing projects changes with your team.

300

00:41:04.440 --> 00:41:07.860

Stephanie Bogan: Having to think of everything good all right tiffany you ready yes.

301

00:41:09.840 --> 00:41:18.000

Jarrold and Tiffany: name one project where lack of clarity has contributed to a breakdown and achieving the desired outcome or timeline.

302

00:41:21.630 --> 00:41:22.650

Stephanie Bogan: let's get some point.

303

00:41:28.140 --> 00:41:32.670

Stephanie Bogan: it's the driving know dry good good call Mike We appreciate that.

304

00:41:36.780 --> 00:41:38.670

Jarrold and Tiffany: onboarding prospecting.

305

00:41:40.800 --> 00:41:41.550

Stephanie Bogan: Neil you're up.

306

00:41:44.250 --> 00:41:44.880

Jarrold and Tiffany: Jared.

307



00:41:45.270 --> 00:41:45.780

Stephanie Bogan: i'm sorry.

308

00:41:46.530 --> 00:41:47.340

Looking at me let.

309

00:41:49.260 --> 00:41:50.310

Neal Albritton: me read it i'll read it.

310

00:41:52.170 --> 00:41:52.650

Stephanie Bogan: To me.

311

00:41:53.880 --> 00:41:56.400

Jarrold and Tiffany: I think, since you driving maybe one instance where you are.

312

00:41:56.400 --> 00:42:05.130

Jarrold and Tiffany: allowed allowed others to not be accountable, because you want to do, avoid conflict or were too busy couldn't figure out how to approach it etc.

313

00:42:19.290 --> 00:42:21.180

Jarrold and Tiffany: etc roles and responsibilities.

314

00:42:22.770 --> 00:42:24.450

Stephanie Bogan: separate pieces my style.

315

00:42:25.140 --> 00:42:25.890

Jarrold and Tiffany: that's good.

316

00:42:26.010 --> 00:42:32.400

Stephanie Bogan: If injured would knew nothing about doing work for their teams when their teams don't do that work that would have never happened when it a.

317



00:42:36.330 --> 00:42:38.040

Stephanie Bogan: step further last question.

318

00:42:38.730 --> 00:42:51.300

Jarrold and Tiffany: The hard habit to break and give one example from the last six months, where you're allowed a situation to where you allow the situation to resist persists that doesn't meet your standards or expectations.

319

00:42:55.290 --> 00:42:56.970

Stephanie Bogan: Now we're moving into real time.

320

00:43:00.180 --> 00:43:02.310

Jarrold and Tiffany: Personal issues that comes up a lot.

321

00:43:03.570 --> 00:43:06.990

Jarrold and Tiffany: Who prospect scripts Isaac that's a good one.

322

00:43:09.720 --> 00:43:10.230

Stephanie Bogan: All right.

323

00:43:10.980 --> 00:43:12.720

Jarrold and Tiffany: She says i'm done with these questions.

324

00:43:19.470 --> 00:43:30.210

Jarrold and Tiffany: All right, maybe a project or change your team mail with your leadership and oversight, but without your direct involvement it's time to share when.

325

00:43:31.140 --> 00:43:32.490

Stephanie Bogan: I want to leave you on a high note.

326

00:43:40.470 --> 00:43:43.380

Jarrold and Tiffany: Nice out of the hiring.



327

00:43:43.620 --> 00:43:46.830

Stephanie Bogan: Carry leadership change for CV in June great.

328

00:43:51.780 --> 00:43:55.110

Stephanie Bogan: Right, that is our last official question i'm going to torture you anymore.

329

00:43:56.010 --> 00:43:56.670

Jarrod and Tiffany: One more.

330

00:43:57.090 --> 00:43:57.330

Okay.

331

00:43:58.950 --> 00:43:59.670

Jarrod and Tiffany: Right.

332

00:44:00.060 --> 00:44:01.020

Stephanie Bogan: received one i'm going to put.

333

00:44:01.710 --> 00:44:06.660

Jarrod and Tiffany: In one issue like to address with your team around implementing, but you have not yet.

334

00:44:17.010 --> 00:44:20.970

Stephanie Bogan: Moving team investments pair planner roll prospecting.

335

00:44:24.960 --> 00:44:27.690

Stephanie Bogan: Look at you kneel team meetings morning.

336

00:44:30.570 --> 00:44:31.050

Nice.

337



00:44:32.640 --> 00:44:36.360

Stephanie Bogan: Right unless went on video so she might be she might be doing some right now.

338

00:44:37.560 --> 00:44:48.210

Stephanie Bogan: So I want you to notice the feeling state of the first questions outside of the fun of the truth of them all that we have all experienced all of those things multiple times and regularly.

339

00:44:49.500 --> 00:45:02.640

Stephanie Bogan: And one of our favorite sayings in coaching is feelings are your friend, they are there to help you and serve you there your indicators your internal indicators that you a view that says, David.

340

00:45:03.180 --> 00:45:11.250

Stephanie Bogan: This feels great we love this embrace this David, this does not feel great we do not love this please account for this.

341

00:45:11.700 --> 00:45:24.720

Stephanie Bogan: Our problem is we've talked about a lot is we stuff, though, so this first set of questions in a fun way is really meant to surface that yeah we all do this to an extent, and as leaders, we want to focus our energy and our teams energy.

342

00:45:25.110 --> 00:45:38.370

Stephanie Bogan: on implementing in a way that's going to be easier, more effective and more enjoyable so that it's an experience that runs a little bit smoother like that we'll, how do we kind of pull out the lumps and bumps in the process.

343

00:45:39.450 --> 00:45:49.560

Stephanie Bogan: So we wanted to revisit two conversations one and we're not going to go too deep into this because it's just going to come up in our conversations today, but it is clarity, transparency and accountability.

344

00:45:50.610 --> 00:46:00.480

Stephanie Bogan: I want you to think about this last question second to last question name or project or team that you nailed with your leadership and oversight, but without your direct involvement Isaac you had one there.

345



00:46:01.140 --> 00:46:15.690

Stephanie Bogan: What did you do different in that project, I think it was the CSA higher different than some of those projects before that allowed your team to execute without your involvement so effectively like what would you how would you account for that.

346

00:46:17.160 --> 00:46:31.110

Isaac Presley: But it seems like it's mostly a function of having a good process in place in the team having REPS on that process already, and so you know I need to be less involved at that point yeah.

347

00:46:31.680 --> 00:46:39.690

Stephanie Bogan: So the process is definition clarity, it says, this is what the expectation is this is how we get to a good outcome.

348

00:46:40.740 --> 00:46:43.650

Stephanie Bogan: Right and then, what was the other component that you mentioned Isaac.

349

00:46:44.520 --> 00:46:49.500

Isaac Presley: Just having REPS with it, so they practice it we've done it before right.

350

00:46:49.710 --> 00:46:56.700

Stephanie Bogan: So when you heard Neil talk about this morning he was like no there aren't any projects because we had our team meeting this morning and we set our priority, so.

351

00:46:57.240 --> 00:47:05.520

Stephanie Bogan: You guys have had a few REPS of right you guys have had a few events at that meal, like the team is now in a momentum we'll have right have a meeting set priorities.

352

00:47:06.360 --> 00:47:21.840

Stephanie Bogan: focus on priorities get priorities done come back and so that's part of the structure that we've talked about in the Managing priorities less than the projects and priorities lesson now what we really want to talk about is the part that we play in that, and this was actually.

353

00:47:22.860 --> 00:47:30.780

Stephanie Bogan: kind of inspired by a conversation that tiffany and I were having it leaders, I think it was that same day with Joe and Neil and Neil I don't remember I can't remember test.



354

00:47:31.230 --> 00:47:38.850

Stephanie Bogan: I think we're on the walk to breakfast or something we were just talking about as we get these systems in place, you have top performers like people who really just show up and get it.

355

00:47:39.540 --> 00:47:47.010

Stephanie Bogan: And then you have people that you really have to have kind of continuous conversations with and there's this issue of how do I frame the conversation.

356

00:47:47.370 --> 00:47:55.710

Stephanie Bogan: How do I manage that, over time, because, as we talked about we don't seem to just show up go hey there's a problem, could you please fix it walk away and our work here is done.

357

00:47:56.430 --> 00:48:04.860

Stephanie Bogan: So we thought it would be really good to kind of revisit this idea or to visit this idea rather have constructive conversations, how can you.

358

00:48:05.580 --> 00:48:16.740

Stephanie Bogan: manage to some of that invisible ink from a people perspective, so that, as there are breakdowns in the process for the people side of it you're in a position to account for them.

359

00:48:17.310 --> 00:48:27.120

Stephanie Bogan: So why don't we want to look through the lens of setting up projects correctly clarity, transparency and accountability, if Isaac sits down with his team and says we're hiring a CSA.

360

00:48:27.540 --> 00:48:41.040

Stephanie Bogan: This is where they fit in the model, this is what we're looking for here's the job description here's the process we followed every time you guys have done this before here's the expected outcome and that structures in place, he can step away.

361

00:48:42.180 --> 00:48:57.270

Stephanie Bogan: Now he could just as easily walk into a team and say you know here's a bullet point list of things I came up with a dinner last night, please hire someone and he could walk away what's the probability he's going to get the outcome, he wants the way that he wants it higher or lower.



362

00:48:58.800 --> 00:49:09.990

Stephanie Bogan: But it's totally large, we all know that so that's job one is, as you think about what's going on in your environment tiffany and Jared had to go to their team and say hey we've been going through a period of huge change.

363

00:49:10.350 --> 00:49:16.620

Stephanie Bogan: We as leaders need to be focused and more accountable here's what we're going to do to shift the experience in this firm.

364

00:49:18.090 --> 00:49:27.150

Stephanie Bogan: So that clarity around why we are where we are and taking a contract right creating transparency here's how we got here and creating accountability.

365

00:49:27.870 --> 00:49:37.050

Stephanie Bogan: Right, the firm is that a place where it needs more you need more, and we can do better that's what we're going to do right, and then they took those steps so whether it's a firm level conversation.

366

00:49:37.650 --> 00:49:48.030

Stephanie Bogan: Whether it's a project level conversation hey, we need to get this project moving let's have let's reframe that and refocus our momentum, or whether it's a problem based conversation.

367

00:49:49.170 --> 00:49:56.970

Stephanie Bogan: deal had a bright he had a conversation that spanned all of those it was personal it was professional and it was showing up in the practice.

368

00:49:57.750 --> 00:50:04.950

Stephanie Bogan: Right So how do we frame a constructive conversation so Neil, this is exactly what we did in the kinda with Radio and me and Joe like okay.

369

00:50:05.670 --> 00:50:14.670

Stephanie Bogan: what's the honest conversation that we want to have here, so I want to talk through how we frame this constructive conversations and kind of the tenants of what makes them successful which are obviously the six bullets on.



370

00:50:15.150 --> 00:50:28.260

Stephanie Bogan: The page in front of you, so I just want to talk a little bit about that today so we've talked a lot about creating this space, but understand we've had this conversation, and I hope you're picking up on it around energy.

371

00:50:29.580 --> 00:50:35.220

Stephanie Bogan: Energy that you can focus your team with energy that they can then focus their energy with.

372

00:50:35.700 --> 00:50:50.430

Stephanie Bogan: So this is really about how we help people understand where their energy is going, how we align our energy at a level and then how we engage in those conversations in a way that feels better to everyone so let's pause here.

373

00:50:51.450 --> 00:51:01.110

Stephanie Bogan: And let's talk a little bit about an issue you had identified one earlier in our chat so identify an implementation issue to improve upon.

374

00:51:02.130 --> 00:51:09.180

Stephanie Bogan: And then we're going to break out into groups and have you work through them, but first we're going to talk through that constructive conversation framework.

375

00:51:09.990 --> 00:51:23.010

Stephanie Bogan: So does everybody have an implementation issue or something that they would like to address in some way that requires reframing conversation, and of course of action or a change of course of action.

376

00:51:23.970 --> 00:51:30.360

Stephanie Bogan: Right, if you have nailed this and you have none, you can just write meal, you can sit in your group and be super helpful and then we'll.

377

00:51:32.550 --> 00:51:40.230

Stephanie Bogan: email, you can talk through how you're going to implement some of the things that you're talking about and keep that momentum going in that just kind of the shifting energy that you've got.



378

00:51:41.070 --> 00:51:47.550

Stephanie Bogan: So I want you to look at this particular issue of through the lens of if I nailed this issue with my team.

379

00:51:49.410 --> 00:51:50.610

Stephanie Bogan: What would the outcome be.

380

00:51:52.380 --> 00:51:56.910

Stephanie Bogan: So, can you drop your issue and the better outcome in the chat.

381

00:52:07.590 --> 00:52:12.090

Kim Waldman: Definitely, what was the second question, not the issue, but the lens sorry.

382

00:52:12.450 --> 00:52:18.900

Stephanie Bogan: The lens that you're looking at through of if I nailed this with my team, what would the outcome look like.

383

00:52:22.230 --> 00:52:26.040

Stephanie Bogan: So Liz would nail things without involvement and she would get on teams.

384

00:52:29.430 --> 00:52:40.830

Stephanie Bogan: So, if your issue is straight so neil's navigating you know and trends, as you know, a major staff transition is that an issue that he wants to have great constructive clarity and reframing and conversations around.

385

00:52:43.170 --> 00:52:49.350

Stephanie Bogan: onboarding process Kim excitement from teams that are onboarding for clients and Isaac implementing or new service model.

386

00:52:50.310 --> 00:53:00.150

Stephanie Bogan: So I want everyone to have one issue that they really want to focus on so we're going to take the next 20 to 30 minutes, probably 30 let's see one, two, we have David 1234.



387

00:53:00.990 --> 00:53:09.480

Stephanie Bogan: will take 20 or 30 minutes and then i'm going to have allison break you into random groups because that's The easiest way to do it, as I understand it.

388

00:53:10.260 --> 00:53:14.340

Stephanie Bogan: I want you to identify this issue so i'm gonna have you go around identify the issue.

389

00:53:14.880 --> 00:53:21.750

Stephanie Bogan: And then we're going to talk through in each of the groups and tiffany Jared and I will rotate through rooms just constructive conversation.

390

00:53:22.200 --> 00:53:31.320

Stephanie Bogan: or just given the number of people, we might stay here so that's issue, what is the implementation issue, and what is it that we want to solve, for if we nailed this, what would the outcome be.

391

00:53:33.000 --> 00:53:34.350

Stephanie Bogan: Right everybody have something.

392

00:53:36.510 --> 00:53:44.580

Stephanie Bogan: Now I want to look at it through the lens of the constructive conversation so on the clarity, transparency and accountability side have you created that clarity for your team.

393

00:53:45.030 --> 00:53:53.430

Stephanie Bogan: here's the outcome and objective here's the what and the why the transparency here's how we're going to do it hey we're implementing a new onboarding process.

394

00:53:53.700 --> 00:53:57.330

Stephanie Bogan: In order to do that we're going to need to identify the breakdowns in our current.

395

00:53:57.750 --> 00:54:04.320

Stephanie Bogan: rate system, then we're going to map out the new process identified the timeline the track in terms of all the steps.



396

00:54:04.590 --> 00:54:10.770

Stephanie Bogan: Right we're going to identify who on how then we're going to build client facing deliverables then we're going to build right here's what we're going to do over the next.

397

00:54:11.130 --> 00:54:21.180

Stephanie Bogan: 90 days here's what i'm going to do here's what you're going to do here's how we're going to manage it we're going to meet every other Friday we're going to break into teams we're hiring an outside consultant.

398

00:54:21.510 --> 00:54:31.740

Stephanie Bogan: Whatever that structure is have we provided that transparency of process and experience and engagement right what's expected, how are we going to surface that progress.

399

00:54:32.280 --> 00:54:40.710

Stephanie Bogan: And then the accountability piece you'll notice, they said hey we're going to meet every Friday or every other Friday to review our progress check in on tasks and next steps and make sure that we're moving forward.

400

00:54:41.430 --> 00:54:54.360

Stephanie Bogan: So that process of managing projects, however you've implemented, it is the track that these conversations run on without that track it's a lot harder, because you don't have an anchor you have something to go back to.

401

00:54:55.410 --> 00:54:56.280

Stephanie Bogan: Is that make sense.

402

00:54:57.750 --> 00:55:11.730

Stephanie Bogan: Right so tiffany and Jared i'm going to ask you to think back to when we first started having those conversations around the legacy issues right the team dynamics all those shifts and change when you think about kind of clarifying the objective.

403

00:55:13.170 --> 00:55:21.660

Stephanie Bogan: what's the What was your experience in terms of making that shift and how you prepared for those conversations.



404

00:55:22.920 --> 00:55:23.190

Like.

405

00:55:24.300 --> 00:55:27.660

Stephanie Bogan: Where we were were you starting I guess from an experience standpoint.

406

00:55:30.990 --> 00:55:32.040

Stephanie Bogan: What were the breakdowns.

407

00:55:34.020 --> 00:55:41.640

Jarrod and Tiffany: breakdowns were by in which ultimately led into adoption and.

408

00:55:42.810 --> 00:55:46.590

Jarrod and Tiffany: Clarity I mean all of those things, so I think you know in.

409

00:55:47.490 --> 00:55:54.210

Jarrod and Tiffany: Part of it was we would make a decision, we would kind of think about it, and we would just like go in and have that conversation.

410

00:55:54.600 --> 00:56:06.210

Jarrod and Tiffany: And, and it wasn't as thoughtful of like decision tell them versus decision what is everyone's role in this, how is this going to affect the team like so there's more pause points and like.

411

00:56:06.570 --> 00:56:22.860

Jarrod and Tiffany: Not just like what's going to be great go to the team like a lot more about process is now built out and thinking through when to be based one piece in like is it we're going to go over the full project are we just going to go over pieces of it so we've definitely shifted on like.

412

00:56:24.060 --> 00:56:30.810

Jarrod and Tiffany: The approach to the team's versus being so fast it just like here's an idea we're going to the team.

413

00:56:30.840 --> 00:56:32.970



Stephanie Bogan: So what you joke on your.

414

00:56:33.540 --> 00:56:42.240

Jarrod and Tiffany: list there you know, clarifying the objective with the team was lacking, we had clarity of purpose among the two of us.

415

00:56:43.530 --> 00:56:49.440

Jarrod and Tiffany: But we didn't create curiosity, we didn't gain agreement, we were sort of taking things out of order.

416

00:56:50.400 --> 00:56:53.610

Stephanie Bogan: Well, and that starts with for us as we approach.

417

00:56:53.640 --> 00:57:00.300

Stephanie Bogan: Whatever your situation is right onboarding or creating these changes is how do you create clarity about what's happening.

418

00:57:01.050 --> 00:57:15.090

Stephanie Bogan: In terms of what you need to account for so with tiffany Jared the the initial accountability anchor was like a leadership culture, which was no fault if there was just the firm right legacy transitions generational stuff.

419

00:57:15.570 --> 00:57:18.090

Stephanie Bogan: And you're busy, and you come in and you rate you're.

420

00:57:18.420 --> 00:57:24.240

Stephanie Bogan: Dealing with all this stuff and then at some point you're like wow we've got to create a different kind of environment and experience here.

421

00:57:25.110 --> 00:57:37.110

Stephanie Bogan: And so what tiffany really highlighted and some of you have super invested team, some of you have really invested teams, but we just haven't worked out that wheel in a way that everybody's energy can work really seamlessly together.

422



00:57:37.620 --> 00:57:40.560

Stephanie Bogan: And some of you have people who are, quite honestly, on the fence.

423

00:57:40.860 --> 00:57:48.540

Stephanie Bogan: We don't know when they don't know if they're going to move up if they're going to move out and we're never trying to create an experience that cushions that.

424

00:57:48.840 --> 00:57:57.390

Stephanie Bogan: we're trying to create a constructive experiences is going to be so painful just as Neil but it's better, on the other side, that is a catalyst for that.

425

00:57:57.810 --> 00:58:12.150

Stephanie Bogan: Because if there's medicine to take, we want to take the little bit early instead of taking a lot later imagine Neil if 3456 years of hey I love you guys and it's Okay, but I don't really want to be here.

426

00:58:13.200 --> 00:58:23.190

Stephanie Bogan: Right, so we we put these conversations off whether it's like hey things just aren't moving the way I want okay i'll get to that very feeling.

427

00:58:24.930 --> 00:58:41.670

Stephanie Bogan: Oh so and so's not following up, I really don't like that i'm getting very feeling and we do that 10 2030 times a day and that's when things are working well if we're paying attention right think about when things are really busy and changing and breaking.

428

00:58:41.670 --> 00:58:45.600

Stephanie Bogan: down and so Those are the things that we want to get really tuned into because that's.

429

00:58:45.690 --> 00:58:59.190

Stephanie Bogan: Energy that we're losing so when we create that clarity, transparency and accountability and anytime you guys are starting a new project or a push or a change or something, and you need help reframing it just reach out to us we're happy to help you.

430

00:58:59.760 --> 00:59:08.010



Stephanie Bogan: But the goal is to lay that track so everybody knows what's happening why it's happening when it's happening how it's happening what's expected of them.

431

00:59:09.120 --> 00:59:12.090

Stephanie Bogan: So they have that common language to constantly come back to.

432

00:59:12.630 --> 00:59:20.640

Stephanie Bogan: It could be as simple as we're going to check in every Friday on this just to make sure that we're moving forward and you guys get to show up every Friday and be like how's it going.

433

00:59:21.300 --> 00:59:24.510

Stephanie Bogan: That is a very basic structure, but it will get you started.

434

00:59:25.170 --> 00:59:35.430

Stephanie Bogan: You can obviously go up to the level that tiffany and Jared and we are we've got boards and projects every quarter and we manage and we plan, but that depth of complexity of experience is not required.

435

00:59:35.790 --> 00:59:46.890

Stephanie Bogan: To create consistency, so I want to make sure to highlight that because I don't want you guys to think that if I don't have all these boards and projects and Assad is that that we can't create this track to run on it's just not the case.

436

00:59:48.000 --> 00:59:57.570

Stephanie Bogan: And then two is can we focus these conversations, to the land of Can you clarify the objective, why is Neil, and I sat there, and like what is it you really want to say to Catherine.

437

00:59:59.970 --> 01:00:00.750

Stephanie Bogan: When you were saying to her.

438

01:00:01.920 --> 01:00:08.610

Stephanie Bogan: Liz, what do you really want to say to people on your team Isaac, what do you really want to say to the team about onboarding this can be a high level.

439



01:00:08.940 --> 01:00:18.840

Stephanie Bogan: hey, this is an area that we've done okay I just came back from retreat and have seen that it is a lot that we can do across the board, the leaders group has a ton of capabilities.

440

01:00:19.260 --> 01:00:25.770

Stephanie Bogan: we're doing okay here, but this is an area that we want to prioritize taking a deeper dive really asking ourselves if we are just.

441

01:00:26.100 --> 01:00:32.610

Stephanie Bogan: immersing our clients in trust and confidence and capability during their first six to 12 months of working with us.

442

01:00:33.330 --> 01:00:40.380

Stephanie Bogan: that's we want, we want them to feel trusted and, like all that stuff we talked about in the lesson that's part of that it could be a breakdown, it could be.

443

01:00:40.890 --> 01:00:51.780

Stephanie Bogan: hey you know what the goal of this role is to break, to be able to provide this kind of experience to our advisors, to make sure that they're prepared and they can sit in that seat of right present and trusted advisor.

444

01:00:52.050 --> 01:01:01.740

Stephanie Bogan: And that means files have to look this way and, as we look at the process, we can see that there's a breakdown there any really like your experience about what you think is happening to create this outcome.

445

01:01:02.910 --> 01:01:05.010

Stephanie Bogan: Which is way different than where your doings right.

446

01:01:06.240 --> 01:01:17.880

Stephanie Bogan: So we can clarify the objective, what is it we're trying to solve for and communicate to challenge your assumptions, this is going to hurt your assumption is that they're wrong and you're right.

447

01:01:19.170 --> 01:01:24.990

Stephanie Bogan: challenge that assumption assume that nobody's right and you need to get curious.



448

01:01:25.500 --> 01:01:34.620

Stephanie Bogan: what's really happening here is all we really care about as business owners, we just get so emotionally invested in what's happening that we can't disengage.

449

01:01:35.040 --> 01:01:39.840

Stephanie Bogan: All the stories in our head and what it means that Oh, my goodness, and all the history and just say.

450

01:01:40.620 --> 01:01:54.510

Stephanie Bogan: what's going on here, I have a good person who seems to care about his or her role, who says they want to do a good job who's not consistently showing up in the way that I need them to I think I there's a breakdown, that we can this for everyone's best interest needs to solve.

451

01:01:55.590 --> 01:02:02.010

Stephanie Bogan: But our stories right our beliefs it like I will put it off will get just to all of those things kick in or it can just be we're busy.

452

01:02:03.330 --> 01:02:10.710

Stephanie Bogan: But the cost of being busy we're distracted is that we aren't setting our people up for success, and if we manage with the track.

453

01:02:11.280 --> 01:02:24.600

Stephanie Bogan: And then these constructive conversations along the way it leaves very little oxygen in the room for lack of clarity i'm not telling you it's going to make people operate the way you want them to it's going to create a lack of clarity about whether they can, and they want.

454

01:02:26.070 --> 01:02:37.020

Stephanie Bogan: And if you don't have those two things, then it doesn't matter if there's a breakdown skills, you can always get it Kim can always find a course a class a person of another Member to call to say help us get this skill set.

455

01:02:38.010 --> 01:02:45.810

Stephanie Bogan: So how do we create curiosity what's happening here what's their perspective, how are they seeing it what's our positive frame.



456

01:02:46.770 --> 01:02:56.010

Stephanie Bogan: you hear me say things all the time, like our goal is to create an onboarding process that so that our clients can and then our team can be.

457

01:02:56.340 --> 01:03:09.090

Stephanie Bogan: orderly and organized you guys can have right all that systems running things for you can show up and do the parts that you really like like what's the frame that we can put around this that everybody agrees is good, then our job is to gain agreement.

458

01:03:11.160 --> 01:03:20.520

Stephanie Bogan: Right what's it going to like we need to ask, do you guys think that it's a good idea to address the breakdowns and create an onboarding process it solves for these things do we think that's the near term issue.

459

01:03:21.000 --> 01:03:32.940

Stephanie Bogan: or a longer term issue now, some of the time you're going to get agreement, some of the times as a lady or not, and then there's a constructive conversation around right how you're prioritizing and timing these things.

460

01:03:33.300 --> 01:03:40.380

Stephanie Bogan: But most of the time, relative to what we're talking about you're going to create a space that allows you to get agreement right hey.

461

01:03:41.040 --> 01:03:48.300

Stephanie Bogan: I really appreciate the contribution that you bring to this firm every single day, and we also know that you're late for days out of five.

462

01:03:48.660 --> 01:03:57.810

Stephanie Bogan: And while this is not the big deal on an individual basis, over time, it suggests that you're not showing up with the same level of commitment to time.

463

01:03:58.140 --> 01:04:10.170

Stephanie Bogan: that the rest of the team is and that sets a precedent that we don't feel good about we just like to understand how this is showing up for you and why this experience persistence bite of the



conversations that we've had is there someplace that we can support you here.

464

01:04:11.880 --> 01:04:23.670

Stephanie Bogan: Am I judging Am I blaming I basically saying we agreed on something, this is why it's important, how can I help you this is not being a pollyanna because Kim am I going to have that conversation 17 times.

465

01:04:26.610 --> 01:04:30.060

Stephanie Bogan: No right, if I have that conversation more than three times what does it mean.

466

01:04:31.200 --> 01:04:38.400

Stephanie Bogan: They can't or they don't want to where they don't know how has Kim tried to solve for don't know how via this process if we're talking about performance yes.

467

01:04:38.820 --> 01:04:50.880

Stephanie Bogan: So we're always just trying to surface, can we get alignment around energy on this issue so that we're agreeing to disperse it in the same time, places and ways to get the outcome we want.

468

01:04:51.720 --> 01:04:54.570

Stephanie Bogan: And when people have stuff that keeps them from doing that.

469

01:04:55.290 --> 01:05:05.190

Stephanie Bogan: Some of its methods they don't have the tools they're overwhelmed they have too much on their plate they're passive aggressive communicators and they don't know how to tell you, and some of its their stuff.

470

01:05:06.180 --> 01:05:13.260

Stephanie Bogan: In conflict avoidance and I cannot say anything I will just put my head in the sand and I will smile and nod and say sure, but it will never get done.

471

01:05:14.220 --> 01:05:25.950

Stephanie Bogan: Right, those are the issues we're trying to surface because we're investing energy in these constructive conversations to keep things moving down the track, and if we can't what does that mean that car needs to come off the track.



472

01:05:27.180 --> 01:05:34.860

Stephanie Bogan: And sometimes that's what we're avoiding and i'm not again none of you were in that horrible situation like that tough situation, but these are the reasons in her head.

473

01:05:35.400 --> 01:05:45.870

Stephanie Bogan: it's going to be difficult they're not going to like it i'm going to have to build a system, I don't have time for that, but what I really trying to articulate today is just the amount of energy that we lose in our organizations.

474

01:05:46.470 --> 01:05:57.780

Stephanie Bogan: By not having that clarity for ourselves that track for our team and then sort of those leadership communication like how are we showing up as leaders to manage people down that track.

475

01:05:58.800 --> 01:06:05.910

Stephanie Bogan: So that's the framing for the conversation, so I thought, rather than my talking at you about this for 45 minutes.

476

01:06:06.300 --> 01:06:19.800

Stephanie Bogan: It would be much more constructive to really just identify an issue and start to break down how we can reframe it so i'm going to ask allison to break you into 1234 just two groups I think allison.

477

01:06:20.130 --> 01:06:21.570

Allison Foulk: yeah I think to sounds good.

478

01:06:23.070 --> 01:06:31.230

Stephanie Bogan: And then, what we'll do is go around in each group identify the issue that we want to create forward momentum around it can be a positive.

479

01:06:31.770 --> 01:06:36.930

Stephanie Bogan: It could be a personal issue like Neil, it could be a problem, so it could be a problem, a person.

480



01:06:37.410 --> 01:06:44.100

Stephanie Bogan: A project, a project, we want to move forward on but where do we have some stuck energy or energy we don't feel good about.

481

01:06:44.550 --> 01:06:49.470

Stephanie Bogan: Around implementing that we want to move into that positive momentum flywheel so share the issue.

482

01:06:49.920 --> 01:06:57.480

Stephanie Bogan: And then, as a group let's go through and literally go through what's the objective, how are we challenging the assumptions, if you can write that down.

483

01:06:57.960 --> 01:07:11.130

Stephanie Bogan: or allison maybe we can cut and paste it into the chat and just go through and start to talk through those issues to get a sense of how to apply the framework for these conversations to any issue that you might be dealing with.

518

01:34:15.300 --> 01:34:29.670

Stephanie Bogan: How was the conversation room when did you guys get through some of that that talking those talking points and dialoguing around somebody issue to get sort of a feel for it.

519

01:34:31.980 --> 01:34:37.620

Stephanie Bogan: Are the key takeaways as you think about your issues, how are you going to apply that Isaac was.

520

01:34:39.000 --> 01:34:39.420

Stephanie Bogan: David.

521

01:34:40.620 --> 01:34:45.480

Isaac Presley: Well, since it was my issue, I was volunteered my lives, thank you, is.

522

01:34:47.100 --> 01:34:50.280

Isaac Presley: My key takeaway so we're working on our service model.

523



01:34:50.550 --> 01:34:53.250

Stephanie Bogan: project to talk about her issue right.

524

01:34:54.180 --> 01:34:54.660

Yes.

525

01:34:57.150 --> 01:34:58.230

Isaac Presley: she's up next.

526

01:35:00.390 --> 01:35:04.050

Isaac Presley: Key takeaways a lot on communication just.

527

01:35:05.820 --> 01:35:15.570

Isaac Presley: being clear getting clear on kind of the big why why, why are we tackling this project, why are things going to be better when we're done and.

528

01:35:16.320 --> 01:35:28.890

Isaac Presley: Looking for things in the project to delegate part of that from you know getting a buy in from everybody perspective, some good advice around slimming things down not trying to boil the ocean every time and.

529

01:35:30.210 --> 01:35:49.770

Isaac Presley: I like the 7525 kind of buy in like everybody needs to be heard, but you're not going to be able to solve 100% of people's issues, every time and then my group also very kindly volunteered to spend many, many hours of peer review on the work i'm doing so that was very nice.

530

01:35:51.780 --> 01:35:54.060

Stephanie Bogan: that's, what do you when you volunteer those are the rewards.

531

01:35:54.270 --> 01:36:03.270

Stephanie Bogan: Yes, great What about so as you guys kind of walk through that and listen to it, you start to feel like there's layers in there, we talked about making sure.

532

01:36:03.660 --> 01:36:10.500



Stephanie Bogan: Everybody has agreement on the problem right, so we talked about gaining agreement it's not just hey here's the course of action it's hey do we have a problem.

533

01:36:10.920 --> 01:36:17.610

Stephanie Bogan: Do we agree what the issues are with the problem, do we agree on the process that we're going right so that's all baked into but once you've got that.

534

01:36:18.240 --> 01:36:27.840

Stephanie Bogan: that's the consensus that you need to move the kind of spend the flywheel, if you will, to get to the next step so as we talked about some of these are going to be situational.

535

01:36:28.230 --> 01:36:37.140

Stephanie Bogan: hey we're kicking off a team meeting and then you implement some of them were be persistent over time tiffin Jared are still having those conversations with the team.

536

01:36:37.560 --> 01:36:42.510

Stephanie Bogan: consistently over time working to elevate like you don't necessarily do this and go from right.

537

01:36:43.020 --> 01:36:53.700

Stephanie Bogan: You guys are all in a pretty darn good spot from a team perspective but we're not going to take somebody from that sea level to that a level overnight, or if someone has a behavioral issue it's a habit.

538

01:36:54.840 --> 01:37:02.700

Stephanie Bogan: And people have those right there you know they're analog people living in a digital world many teams have that there are.

539

01:37:02.970 --> 01:37:11.550

Stephanie Bogan: You know I nod my head and say i'm going to do it, but the follow through is just never there and then they're very proactive cases where we're just launching positive project so.

540

01:37:12.180 --> 01:37:18.420

Stephanie Bogan: Think about that structure and how you can apply it to the conversation the conversation that you're going to be having.



541

01:37:19.890 --> 01:37:28.530

Stephanie Bogan: In our room let's see Joe Neal do you guys want somebody want to summarize what we went through Kim you want to, or you guys want to summarize takeaways from them.

542

01:37:30.900 --> 01:37:36.840

Joe Van Name: I guess, for me, we talked about me and my pair planner stuff i'm just trying to make sure that i'm.

543

01:37:38.190 --> 01:37:50.220

Joe Van Name: Keep everybody listening so shields don't go up engage them all and how to make it work and then using that like sort of the phrase, what will it take for us to like you know get to this point, etc, so.

544

01:37:50.880 --> 01:37:59.400

Stephanie Bogan: yeah we had some good conversation around you know Problem Solving around people, but then also team Problem Solving and Kim made, I thought, a really good point.

545

01:37:59.850 --> 01:38:08.760

Stephanie Bogan: That you hear us tiffany and Jared did a really good job of this if you guys want to share anything about that is engage the team and solving the problem you don't have to show up and say.

546

01:38:09.300 --> 01:38:16.590

Stephanie Bogan: As a here's the path right, we can show up and say here's what we want here are the breakdowns here's the outcome we're trying to create.

547

01:38:17.010 --> 01:38:27.390

Stephanie Bogan: What he and I might one of my favorite questions you guys here with us so much what will it take to what will it take for me to be gone for 45 days and feel everybody feel good about it, what will it take for us to launch this project.

548

01:38:27.900 --> 01:38:37.680

Stephanie Bogan: and get it done in 90 days, what will it take for us to be down one pair of planner and still provide this level of service what's it going to mean to us how are we going to have to show up what



tech, are we going to need.

549

01:38:38.100 --> 01:38:46.950

Stephanie Bogan: Those brainstorming conversations when you can engage your team one they have boots on the ground, so they generally have as much more more information than you do.

550

01:38:47.400 --> 01:38:52.470

Stephanie Bogan: To when they get involved at that level and their brains click into having to solve the problem.

551

01:38:53.250 --> 01:39:03.720

Stephanie Bogan: They are big naturally become much more invested in making that outcome, a reality, like if they've come up and engage in this the problems around that they want to, then take it and implement it or there's a much higher.

552

01:39:04.080 --> 01:39:07.260

Stephanie Bogan: probability and energy and momentum around it.

553

01:39:07.740 --> 01:39:16.410

Stephanie Bogan: So I thought that was a great point that Kim made and that Joe will apply is it's okay to sit in the conference room and the whiteboard of the zoom screen and say hey We just need to talk about what it's going to take.

554

01:39:17.040 --> 01:39:25.080

Stephanie Bogan: To make this happen, so that we can account for it timeline and budget and resource in a way that will work and also feel good to everyone.

555

01:39:25.980 --> 01:39:27.630

Stephanie Bogan: That environment we're trying to create.

556

01:39:27.750 --> 01:39:28.320

Stephanie Bogan: Jeff go ahead.

557

01:39:28.560 --> 01:39:34.020



Jarrold and Tiffany: Wait a recent example of that coming back from leaders, I was like oh i'm totally going to be this leader, but it was like.

558

01:39:34.710 --> 01:39:48.810

Jarrold and Tiffany: client status reports, but several of the firms are sending out where there's some that are doing an onboarding and some with the existing clients like I was like Oh, this is going to be so great, because I feel like there's a little bit of a gap in like like.

559

01:39:49.860 --> 01:39:56.550

Jarrold and Tiffany: client communication and just transparency and like what's outstanding and i'm like what a great way to lift the curtain and all that stuff so.

560

01:39:57.390 --> 01:39:59.640

Jarrold and Tiffany: I came back to the team like.

561

01:40:00.150 --> 01:40:07.140

Jarrold and Tiffany: there's like these firms are doing the status reports and like think about how that changes from reactive to proactive and.

562

01:40:07.320 --> 01:40:16.350

Jarrold and Tiffany: What that could look like now there's three teams and they're all in various stages of how many clients, they have, and if there is a surgeon surgeon so i'm like plant, the seed.

563

01:40:16.590 --> 01:40:26.580

Jarrold and Tiffany: The status reports are super cool and these outcomes that are receiving this is what the client experiences one next meeting was like paid.

564

01:40:27.090 --> 01:40:32.490

Jarrold and Tiffany: By August 5 I would love for you to report to Jared Jared was out so now he gets to manage this, but.

565

01:40:32.940 --> 01:40:38.370

Jarrold and Tiffany: Like I love for you to like think about like how could you implement that, for your team, and when and.



566

01:40:38.610 --> 01:40:47.940

Jarrold and Tiffany: Why, or what you know challenges, will you face and those types of things to bring in the buy in for each of the leaders and how they're going to do it, I already know how like it is and i'm like hey and.

567

01:40:48.270 --> 01:40:59.280

Jarrold and Tiffany: Supply some resources and examples of other firms and what they're doing so you can take that into consideration, we have one that jumped on it immediately and already trial that with like several clients, we have another one that's like.

568

01:40:59.760 --> 01:41:03.660

Jarrold and Tiffany: i've been overwhelmed and that scares me like that's added to my to do list so i'm like great.

569

01:41:04.020 --> 01:41:12.210

Jarrold and Tiffany: Like the question is how, but instead of us being like this is how it's going to be done here is the way it's going to look and all those things it's like hey.

570

01:41:12.690 --> 01:41:18.390

Jarrold and Tiffany: How do you think that will come to derail he can meet them but it's no longer us like the.

571

01:41:19.020 --> 01:41:25.560

Jarrold and Tiffany: dance we plan so I love I love that yeah and Greg there's guard rails right like the deliverable date.

572

01:41:26.070 --> 01:41:38.850

Jarrold and Tiffany: The purpose what we're trying to achieve out of it, like those are the guardrails so you don't get to choose to do nothing, or to do something way over here it's like but you get to own the process and have a lot of buying so it's great yeah.

573

01:41:39.900 --> 01:41:42.720

Jarrold and Tiffany: And the status reports are stellar and i'm super excited about it.

574



01:41:44.700 --> 01:41:51.480

Stephanie Bogan: And so, when you're new to tiffany's doing there she's clarifying the objective like hey wouldn't it be great to have her clients feel this way.

575

01:41:52.170 --> 01:41:59.760

Stephanie Bogan: Right and, as she goes through that process so again this doesn't have to be in right a one and done thing you notice what she's talking about is creating curiosity.

576

01:42:00.090 --> 01:42:11.160

Stephanie Bogan: So all of those steps apply to us into the other person like, how can we get our teeth, so a question like hey we're going to do this in the next 90 days, and we need to plan it out, is a one way conversation right.

577

01:42:12.030 --> 01:42:21.210

Stephanie Bogan: what's it going to take for us to get this done in the next 90 days with the things that we've got and right that we cannot leave here feeling going on Friday is a very different conversation it's an open ended question.

578

01:42:22.680 --> 01:42:34.860

Stephanie Bogan: Your brain cannot help but try to solve open ended questions, because it is programmed to be a curiosity Problem Solving machine so when you create curiosity, this is really cool people's brains cannot help but step into it.

579

01:42:36.000 --> 01:42:37.470

Kim Waldman: What would it take thing.

580

01:42:38.790 --> 01:42:47.730

Kim Waldman: That I have that i'm doing also with onboarding is I kind of picked a person who can sometimes be highly critical.

581

01:42:48.360 --> 01:42:57.120

Kim Waldman: To be the pilot or so like hey you know we have four teams that have to do this, but i'm gonna i'm asking you, if you'd be willing to pilot it and be able to give feedback right.

582

01:42:57.330 --> 01:43:05.070



Kim Waldman: So i'm trying to build ownership in that way, as well, so piloting and, of course, it was very exciting and so far, so good so.

583

01:43:05.280 --> 01:43:05.670

Great.

584

01:43:07.350 --> 01:43:16.050

Stephanie Bogan: Alright, we are at the top of the hour, I think we've got a minute to spare so we're going to wrap it here i'm going to come a free calm and it keep one minute so we're going to get back to even here shortly.

585

01:43:16.620 --> 01:43:25.500

Stephanie Bogan: Hopefully this call helps you guys today you're all in some form or fashion implementing changes within your firm, many of you are implementing many changes in your firm.

586

01:43:25.830 --> 01:43:31.650

Stephanie Bogan: So after leaders retreat it felt like this would be a good conversation to circle back to the structure for implementing.

587

01:43:31.950 --> 01:43:44.250

Stephanie Bogan: but also our personal and leadership strategies for how we implement with our teams at a personal level but also at a practice level and in a way that really is productive and keeps our energy and momentum.

588

01:43:44.580 --> 01:43:50.700

Stephanie Bogan: Really aligned and moving forward so as you reflect on this conversation and conversations that you guys had at the breakouts.

589

01:43:51.180 --> 01:43:58.170

Stephanie Bogan: If we can help you in any way we're on trying to figure drop us an email if there's anything you want to talk for you, please, let us know, that is what we're here to help you for.

590

01:43:58.560 --> 01:44:05.130

Stephanie Bogan: And remember today's Monday, so you got to bring the mojo and remember that life is now in session so go make awesome stuff happened.

