

LIMITLESS Coaching Call Transcript

JULY 25TH, 2022
COACHING CALL
CLIENT ONBOARDING: THE SPACE BETWEEN

151

00:15:56.250 --> 00:16:14.100

Stephanie Bogan: This month coaching call is on your new client onboarding process and, ultimately, how to how do we optimize that, in a way that it can be orderly and organized an optimal experience for everyone going through the process and, as we saw in the chat that is not always the case.

152

00:16:15.300 --> 00:16:23.700

Stephanie Bogan: So what is the new client onboarding process, we all know, it is that space between the prospect process when you are creating awareness and interest.

153

00:16:24.090 --> 00:16:35.850

Stephanie Bogan: and giving people the opportunity to make a decision with you, and when they enter the service model right that sustainable system that you have using your client service model and surges and value ads and model meetings.

154

00:16:36.240 --> 00:16:50.460

Stephanie Bogan: To deliver that value over time, but there's a transition period, there is a chasm to be gaps, where we go from saying yes to being well inside the system, and that is a place that can get messy.

155

00:16:50.940 --> 00:16:57.870

Stephanie Bogan: As we saw from all those items in the chat it's the space where you have to spend a lot of personal time and attention and hand holding.

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00:16:58.350 --> 00:17:05.400

Stephanie Bogan: And what we wanted you to see is that there are some best practices that you can start to employ, as you have in other parts of the practice.

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00:17:05.700 --> 00:17:14.430



Stephanie Bogan: To really elevate not just the structure, but the experience that everyone has both you the client and your team so that's what we want to highlight today.

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00:17:16.140 --> 00:17:22.860

Stephanie Bogan: Adam do any of these sound familiar to you do you ever have up and asked any of these things.

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00:17:23.850 --> 00:17:33.780

Adam Cmejla: Well, I think this is the important part, that this is a mistake that I think a lot of advisors can end up making where they spend so much time focusing on getting the client.

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00:17:34.470 --> 00:17:41.460

Adam Cmejla: right that they attracting the client and bringing them into the firm and then, once the client says yes and we start.

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00:17:41.820 --> 00:17:50.310

Adam Cmejla: Bringing on the process advisors just by nature of what we do we're on to the next one on the next one, and we keep wanting to make sure that we're wrong right it's more.

162

00:17:50.400 --> 00:17:51.690

Garrett Harper: yeah that's silly stuff.

163

00:17:53.460 --> 00:17:55.140

Adam Cmejla: Oh thanks Garrett.

164

00:17:58.230 --> 00:18:10.080

Adam Cmejla: And we certainly right we just we just asked why we just asked relationship to commit to our firm and deal with something that is some of, if not the most personal thing that in their life, their money and their future and their dreams that are wealth.

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00:18:10.680 --> 00:18:17.790

Adam Cmejla: And and there's a there's a phrase that i've instilled in our firm it's something that I learned a long time ago that I think is really powerful is that.

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00:18:18.810 --> 00:18:23.700

Adam Cmejla: resentment and lack of trust can set in the moment communication ends.

167

00:18:24.120 --> 00:18:32.340

Adam Cmejla: And I think that is just something really important as you're thinking about the onboarding process to don't lose touch with the fact that, yes, there are administrative things that need to get done.

168

00:18:32.910 --> 00:18:39.600

Adam Cmejla: But it's also important to be empathetic to the client about what's happening in manage and set expectations along the way, because.

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00:18:40.170 --> 00:18:48.180

Adam Cmejla: country like we send the chat as much as we want things to go right, the first time, sometimes things are be under control and that's where having that.

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00:18:48.570 --> 00:19:00.870

Adam Cmejla: candid conversation with the client and managing expectations I just I want to instill that in the theme of this conversation with onboarding to manage client expectations and timelines and be transparent and what to expect next don't leave them guessing.

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00:19:02.070 --> 00:19:07.290

Stephanie Bogan: Well, and the thing I want each of you to ask yourself is imagine that you are the client.

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00:19:09.060 --> 00:19:22.050

Stephanie Bogan: you've just sat across from you and you've had a series of meetings or phone calls in those conversations you have imparted hopefully like trust credibility, they are believing that this is a good idea.

173

00:19:22.650 --> 00:19:30.630

Stephanie Bogan: And then, what happens after they say yes and walk out of the office, I want you to imagine that you're on their side of the street, what are they thinking.

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00:19:31.290 --> 00:19:37.920

Stephanie Bogan: What are they experiencing functionally what letters what emails what



communications or lack there of.

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00:19:38.400 --> 00:19:45.510

Stephanie Bogan: What expectations, do they have if you haven't set them, they have it's much easier to meet expectations.

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00:19:45.930 --> 00:20:03.270

Stephanie Bogan: If you share them and get agreement on them, but more importantly, the fundamental feeling that comes with being a financial advisor The thing that you get paid for at the absolute base human level is trust it's trust.

177

00:20:04.380 --> 00:20:25.620

Stephanie Bogan: And I want you to ask yourself if you're really honest when your new clients are onboarding what is the feeling state that they are experiencing is it assurance trust confidence, or is it not knowing uncertainty doubt, maybe even frustration.

178

00:20:27.210 --> 00:20:38.430

Stephanie Bogan: What is the experience and the feeling that you want them to have at the moment that you kick off the relationship with that first step that says we're going to start delivering.

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00:20:39.330 --> 00:20:53.190

Stephanie Bogan: And the question Adam and I and all of the alumni constantly ask themselves or this can we always positively answer, the most important questions that clients are always asking, can I count on you.

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00:20:54.720 --> 00:21:07.170

Stephanie Bogan: Every one of those questions every challenge every question about value or the fee is ultimately boils down to you can I count on you to be there in the ways that I expect and value.

181

00:21:07.590 --> 00:21:18.900

Stephanie Bogan: To meet my needs motivators and goals we've, given that a name we've given it processes we've given it structure and meetings, but in the end, this is the thing that I need to know.

182

00:21:19.620 --> 00:21:39.270

Stephanie Bogan: To continuously right that fee or sign off on it and feel great about it, so we want you



to look through the lens of the structure that we're about to go through with that grounding on the feeling state of where clients are and where you want them to be as they go through this process.

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00:21:40.920 --> 00:21:43.950

Stephanie Bogan: Adam you want to walk us through your favorite steps.

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00:21:47.280 --> 00:21:59.280

Adam Cmejla: So it's I think the biggest takeaway that we learned, as we continue to refine down the onboarding process are similar lessons that we learned the prospecting process.

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00:21:59.670 --> 00:22:14.490

Adam Cmejla: In that it is just that it is a process it's not a falling off a cliff event, it is a process that happens, and so I think the biggest mistake that we made early on, both on the prospecting side as well as the onboarding side was just.

186

00:22:16.200 --> 00:22:30.030

Adam Cmejla: pouring all of the stuff that needs to get done in the onboarding process on to them right away okay welcome aboard as a client now here are the 37,000 different things that we need you to do do right a task we don't like tasks.

187

00:22:30.690 --> 00:22:35.160

Adam Cmejla: That just we collectively as people don't like another thing in our to do list.

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00:22:35.730 --> 00:22:43.320

Adam Cmejla: But there are things that need to get done so, what we have found is that by breaking it up into steps and chapters, if you will, of the planning process.

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00:22:43.560 --> 00:22:49.680

Adam Cmejla: That has what that's what it's that's what has made it an easier pill to swallow for clients coming on board so.

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00:22:49.950 --> 00:22:58.800

Adam Cmejla: The welcome packet and again the two tools that I would encourage all of you to utilize that we have found to be extremely beneficial in allowing us to.



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00:22:59.730 --> 00:23:03.000

Adam Cmejla: want to stephanie's favorite phrases that i've loved has been to scale special.

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00:23:03.840 --> 00:23:08.850

Adam Cmejla: To personalize an automated process or to personalize the system at systematized process.

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00:23:09.180 --> 00:23:15.270

Adam Cmejla: To tools to use number one your scheduling software so as you're booking your planning meetings with clients.

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00:23:15.510 --> 00:23:21.600

Adam Cmejla: All of the things that we have here right the welcome the implementation, the planning, implementation progress reporting.

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00:23:21.930 --> 00:23:26.280

Adam Cmejla: All of those are going to be meetings or going to be some type of different.

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00:23:26.670 --> 00:23:34.170

Adam Cmejla: strategy or a different type of appointment that you could that you could not saying you have to that you could set in your appointment software calland Lee cutie.

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00:23:34.560 --> 00:23:42.180

Adam Cmejla: use that as the opportunity to communicate your message set expectations manage expectations set timelines.

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00:23:42.510 --> 00:23:48.060

Adam Cmejla: that's one place, that you can think about creating an adding just your your setup sense of authenticity.

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00:23:48.450 --> 00:23:54.870

Adam Cmejla: and compassion to the relationship, and then the other tool that we've used that we've talked about many times has been text expand or.



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00:23:55.170 --> 00:24:03.480

Adam Cmejla: So, for example, the welcome process we share welcome aboard as a client we're so happy to welcome you to be integrated planning and wealth management family of clients.

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00:24:03.990 --> 00:24:13.230

Adam Cmejla: Kathy does all of that all of that has been systematized inside of text expand or the kickoff we have our onboarding process our first step is our go meeting or get organized meeting.

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00:24:13.500 --> 00:24:25.890

Adam Cmejla: that's where john will walk them through a money we call it wealth plan start filling in the blanks that's where also john kind of engages some of that life planning conversation that kendra three questions will send that to them as a preemptive.

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00:24:27.510 --> 00:24:39.090

Adam Cmejla: food for thought and then we have our up to four planning meetings that we have and I I did share a sample of our planning process with the limitless team I believe that's in a library somewhere, at least if it's not can you.

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00:24:39.930 --> 00:24:45.510

Adam Cmejla: silently make a note to make sure that that is nested in this lesson, where we shared our new client timeline.

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00:24:45.720 --> 00:24:53.100

Adam Cmejla: We send that to the client again again, all of this is done through the filter of managing and setting expectations you're going to hear stuffy, and I say that.

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00:24:53.370 --> 00:25:03.210

Adam Cmejla: Probably no less than another 10 times just in this one call alone because, like she had said what happens when we don't they will, when we don't set expectations, they will.

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00:25:04.380 --> 00:25:15.990

Adam Cmejla: And then last thing i'll say before before I wrap up my point here, we have also in active campaign we have built an automation system and automation that goes out.

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00:25:16.410 --> 00:25:31.770

Adam Cmejla: One week was it six emails that goes out once a client agrees to come on board as a client gets a week after than a week after that, then a month after that, then a month after that and the Month after that and a month after that so it's six times and I believe that is over.

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00:25:32.910 --> 00:25:39.360

Adam Cmejla: I might be getting my timeline wrong, but my point is, those are specifically generic emails in that they're just another touch.

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00:25:40.050 --> 00:25:46.260

Adam Cmejla: The, for example, the fourth one says something that effect of I know we've been going through a lot, I know this has been a commitment.

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00:25:46.560 --> 00:25:56.010

Adam Cmejla: But we've learned, as with most things in life, if we want something we've never had before we're gonna have to do something we've never done before and we're just so grateful that you're along for this or that we're along on this ride with you.

212

00:25:56.190 --> 00:25:58.680

Adam Cmejla: Thank you for cute for your continued commitment to the process.

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00:26:00.030 --> 00:26:09.210

Adam Cmejla: It doesn't it's not time to anything it's not like we send that out when they get their paperwork done it doesn't matter when that goes out So these are two parallel tracks of communication.

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00:26:09.600 --> 00:26:17.910

Adam Cmejla: That just allow us to touch the client in a way that tells them that we see you we hear you we empathize with you and we're there for you.

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00:26:19.260 --> 00:26:25.800

Stephanie Bogan: So, as you think about the structure of your process you're going to have a welcome right which will go through, and a little bit more depth.

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00:26:26.220 --> 00:26:31.920

Stephanie Bogan: The implementation kickoff where you're really setting those expectations and



initiating that first round of work.

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00:26:32.460 --> 00:26:42.270

Stephanie Bogan: you're going to start implementing the plan, you will have different models, based on my experience many of you will do a lot of planning and a very short and concentrated period of time.

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00:26:42.690 --> 00:26:52.530

Stephanie Bogan: Or do some of that on the front end is part of the prospect process and then get into that service model more quickly, more and more we're seeing advisors, we are really.

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00:26:52.830 --> 00:27:05.160

Stephanie Bogan: kind of extending that out over that first year, or that first six months and then integrating them into the service model, depending on whether they're in a six or a 12 month schedule so we're really defining this phase.

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00:27:05.700 --> 00:27:19.620

Stephanie Bogan: As a bridge between the prospect process and the service model so you'll want to architect that phase three based on how you implement on the actual planning investment insurance side, whether it's a contracted period or a longer period.

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00:27:20.400 --> 00:27:24.870

Stephanie Bogan: which really important, irrespective of that, and this is where it tends to break down.

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00:27:25.560 --> 00:27:31.800

Stephanie Bogan: It doesn't usually break down on the implementation, certainly not on the asset side because that's where the economics are coming from.

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00:27:32.280 --> 00:27:41.220

Stephanie Bogan: It tends to break down on that expectation management and the experience around what's happening why it's happening and what to expect so there's two things one.

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00:27:41.460 --> 00:27:55.770

Stephanie Bogan: we're not fulfilling on our commitment to right be that person and brand that they can that they can count on and to we're giving up a huge opportunity to put trust equity in the bank in easy ways.



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00:27:56.580 --> 00:28:06.270

Stephanie Bogan: So progress reporting can be some of my favorite one of our leaders kyle has a weekly email that he sends to everyone and it's just one email three to four minutes.

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00:28:06.660 --> 00:28:11.910

Stephanie Bogan: Talking about whatever's going on, so he starts that with personal videos in the onboarding process.

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00:28:12.540 --> 00:28:23.850

Stephanie Bogan: And then quickly layers them into the firm communication and people come to feel like they have a deep relationship with him much more quickly right because he's just showing up in that trusted advice way.

228

00:28:24.600 --> 00:28:32.730

Stephanie Bogan: We have something we call Friday follow ups, you can pick a day of the week Friday follow ups is catchy and people remember it where every Friday is the day that.

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00:28:33.030 --> 00:28:40.980

Stephanie Bogan: your team is following up with clients and the onboarding phase and updating them take making sure those next steps are calendar and making sure that your updated.

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00:28:41.370 --> 00:28:49.830

Stephanie Bogan: So it's plans get used to it kyle sends his relationship his advice right packaging right his commentary his opinion, if you will.

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00:28:50.250 --> 00:28:56.790

Stephanie Bogan: on Sundays, at the same time, Friday follow ups, ideally, should be, if you want them to kind of create that expectation set.

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00:28:57.450 --> 00:29:02.130

Stephanie Bogan: And that confidence it's you know every Friday morning or afternoon, you can pick any day of the week.

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00:29:02.580 --> 00:29:10.800

Stephanie Bogan: But the idea is to create a system that your team can follow, and if you have the confidence in it to reveal that to your clients and its really confidence inspiring.

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00:29:11.310 --> 00:29:17.610

Stephanie Bogan: Adam as he mentioned does those monthly communications again, depending on how much you're covering with them you're going to want to look at the.

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00:29:17.880 --> 00:29:27.180

Stephanie Bogan: How tight you make that schedule monthly emails should go out certainly to clients, but also to centers of influence you're going to want to make sure that you're including.

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00:29:27.690 --> 00:29:33.630

Stephanie Bogan: Where it's a referral certainly you're going to use that five step process and where it's not this is your opportunity.

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00:29:33.960 --> 00:29:41.400

Stephanie Bogan: To expand your Center of influence network, because it can simply be a part of your onboarding process to make those outreach is you're going to have an email.

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00:29:41.850 --> 00:29:49.200

Stephanie Bogan: Right you're going to go through that process they'll ultimately get on the mailing list, then you have a bridge to deepening the relationship so you want to make sure that structured in there.

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00:29:49.620 --> 00:29:58.650

Stephanie Bogan: And then again if you're extending the process out over a year you're going to want to make sure you have quarterly implementation, implementation check ins or progress reports with the client.

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00:30:00.030 --> 00:30:07.230

Stephanie Bogan: Then you're ultimately going to move them into the service model so those are the core phases that you're going to follow so let's spend a little bit of time talking about.

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00:30:07.470 --> 00:30:12.570

Stephanie Bogan: What are the best practices and how that's being applied in practices like yours, and



then you can.

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00:30:13.110 --> 00:30:22.380

Stephanie Bogan: You can really think through how you're going to map that out when it comes to your process and if you've got questions don't forget to put them in slide oh Lisa will let us know if any drop in.

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00:30:23.520 --> 00:30:31.350

Stephanie Bogan: Before we get into some of the samples of how you can execute on the structure, because that's the part that right makes it a lot more transparent for all of us.

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00:30:31.740 --> 00:30:38.340

Stephanie Bogan: Is I want you to think about that structure, through the lens of the feeling state that we talked about the mindset, the stories one of those.

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00:30:38.610 --> 00:30:45.750

Stephanie Bogan: Thought bubbles, that the clients are having in their head as they're engaging in the email or the paperwork, where the conversation with someone on your team.

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00:30:46.290 --> 00:30:52.770

Stephanie Bogan: So in the beginning stage we're going to start it anticipation like Okay, we can do this right we're signing the agreement we get a welcome kit.

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00:30:53.190 --> 00:30:57.600

Stephanie Bogan: If you're not doing it right it's sort of uncertainty, what happens after this step.

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00:30:58.530 --> 00:31:04.620

Stephanie Bogan: Next you're going to start kicking off implementation, which means you're going to take action and what we know about when people have.

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00:31:05.040 --> 00:31:11.250

Stephanie Bogan: Things they want to act on our worries when they take action there's an element of relief that kicks in right, so this is the phase where they're like.

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00:31:11.760 --> 00:31:19.410

Stephanie Bogan: Okay we're doing something right as you do those progress progress reports quarterly weekly, monthly depending on your schedule.

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00:31:19.650 --> 00:31:27.570

Stephanie Bogan: you're creating information and that helps people Elijah know oh that's right we're on track hey when clients going to see that and be like absolutely.

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00:31:28.200 --> 00:31:38.040

Stephanie Bogan: we're where we're supposed to be that allows us to move into that comfort and confidence stage I really am in good hands right that staying connected Andrew that we know.

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00:31:38.550 --> 00:31:43.740

Stephanie Bogan: We know what to expect you show up consistently and you deliver there's good, positive communication.

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00:31:44.430 --> 00:31:54.030

Stephanie Bogan: The opposite of that is i'm disengaged at this phase i'm wondering where did you go and what happened next notice how i've gone from uncertain to this worry loop to hey what happened to my advice.

255

00:31:55.830 --> 00:32:02.610

Stephanie Bogan: And it's just about not just what you're doing, but how we're presenting what we're doing going back to some of those communications that Adam talked about.

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00:32:03.330 --> 00:32:03.570

Adam Cmejla: yeah.

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00:32:04.440 --> 00:32:14.610

Adam Cmejla: Go ahead Oh, as I say, this is again the the common theme in this slide is managing the and setting expectations to not leave clients in the dark of what's happening, and the first thing.

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00:32:15.270 --> 00:32:22.410

Adam Cmejla: The first thing that is on again this is this is something that can be systematized that can be documented should be documented in your CRM.



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00:32:22.620 --> 00:32:37.650

Adam Cmejla: All the major CRM is out there can can do that, even if you're not getting on paper just get that checklist down this is what we do this is when we do it, this is who does it on our team, and this is for which client and have that systematized process the don't.

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00:32:38.670 --> 00:32:46.800

Adam Cmejla: Another way that you can up level this process for the client to keep them above the line there, thank you, this is perfect, because this goes right into.

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00:32:47.730 --> 00:32:56.070

Adam Cmejla: What I want to talk about is the personalized everything that we see, and this is more task management related but don't.

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00:32:56.490 --> 00:33:00.120

Adam Cmejla: underestimate, or I should say underestimate don't forget the human side of this equation.

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00:33:00.420 --> 00:33:12.270

Adam Cmejla: So one of the standard things that we do in our firm is, we have, because we have clients all over the country, it became difficult for us to think about how we could send a welcome gift to client, so there is a company in indiana called the taste of indiana.

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00:33:12.780 --> 00:33:20.490

Adam Cmejla: And what they do is they have gift baskets that are made up of all kinds of different gifts all source from indiana so for what it's worth.

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00:33:20.760 --> 00:33:28.080

Adam Cmejla: it's a nice little touch and what we do is that's again in workflow Kathy has it as a step in the onboarding process.

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00:33:28.380 --> 00:33:44.310

Adam Cmejla: To email taste of indiana with the clients contact and promoting with their mailing address etc case of indiana bundles it all together they ship it out, I can't think of a client that hasn't sent us a oh my gosh what a nice gift basket Thank you so much for doing that that was amazing.



267

00:33:45.360 --> 00:33:57.330

Adam Cmejla: I could not even tell you what's in the gift basket I just know it's all source from indiana and it's a touch of indiana taste of indiana The other thing that i'll do is as i'm listening to the prospect and now new client.

268

00:33:57.930 --> 00:34:02.220

Adam Cmejla: What are things that they enjoy what are things that I think they might like.

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00:34:03.210 --> 00:34:11.850

Adam Cmejla: Kathy will have i'll put that in the workflow in the onboarding workflow go to Amazon and send this one little gift right, it could be a \$25 gift.

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00:34:12.210 --> 00:34:17.730

Adam Cmejla: it's that personally right everything that you look on here is more on the quantitative side of the relationship.

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00:34:18.000 --> 00:34:22.290

Adam Cmejla: Getting the data doing the paperwork finding account numbers transferring assets.

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00:34:22.590 --> 00:34:35.010

Adam Cmejla: But the qualitative side of that is why clients will stay with you right they came to you because of something became because of a problem, then everything that we're doing on this on this page right here is directly related to solving that problem.

273

00:34:35.520 --> 00:34:36.690

Adam Cmejla: But there's such a human.

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00:34:36.720 --> 00:34:43.260

Adam Cmejla: element to that as well in those little things those little nuances what you can do to really build trust capital and relationship equity with your clients.

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00:34:43.980 --> 00:34:47.670

Stephanie Bogan: Well, and the reason that visual Kim was complimenting you on that the visual.



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00:34:47.700 --> 00:34:48.510

Adam Cmejla: visual Thank you.

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00:34:49.380 --> 00:35:00.030

Stephanie Bogan: As one do you notice the how we took all these disparate steps imagine that you're someone who's joining Adams team, and you look at this and in an instant you have a visual impression a story.

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00:35:00.390 --> 00:35:07.290

Stephanie Bogan: Of what the experience, all these tasks and steps and processes are supposed to go through so one it's really valuable so when you.

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00:35:07.620 --> 00:35:14.970

Stephanie Bogan: get up with your team, and you roadmap, the process and the outline to Adams point you're going to do it very similar to this in a functional view.

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00:35:15.510 --> 00:35:26.130

Stephanie Bogan: And then, as we've talked about through the expect the lens of the expectations are we managing and communicating around the experience and the level of engagement and you put those two things together.

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00:35:26.520 --> 00:35:34.470

Stephanie Bogan: And then you'll have a back office system that's really tight understanding that different people will go through a different your use your workflows and your.

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00:35:35.100 --> 00:35:44.100

Stephanie Bogan: Your kind of your internal systems to chunk that work so that right, you have a workflow and a process when you're doing the estate planning review and you have a workflow and process when you're reviewing.

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00:35:44.400 --> 00:35:53.160

Stephanie Bogan: The compensation or the partnership agreement, each of those has a workflow what you're doing is creating a path that strings all of those together.



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00:35:53.700 --> 00:36:01.260

Stephanie Bogan: For the new client onboarding part of the process, so this is Adam sort of internal operational functional view.

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00:36:01.800 --> 00:36:14.100

Stephanie Bogan: And then ultimately going back to that experience and expectation setting, we want to in the ideal create a visual story a graphic version to help set the client expectation and experience one.

286

00:36:14.160 --> 00:36:22.350

Stephanie Bogan: Yes, credibly valuable to capture it to the reason we are such big fan of visuals is visuals are like stories to your brain.

287

00:36:23.100 --> 00:36:27.690

Stephanie Bogan: Can stories actually activate your brain in several different places.

288

00:36:28.170 --> 00:36:36.210

Stephanie Bogan: When you see a visual it's almost impossible not to look right, you simply can't help it your brain has to wants to take all those pieces put it together.

289

00:36:36.540 --> 00:36:44.310

Stephanie Bogan: And figure out the story that it's telling you when you see a bullet point list your brain doesn't respond in the same way, which is why so you can see.

290

00:36:44.760 --> 00:36:50.970

Stephanie Bogan: A version of Adams here, this is Taylor shorties it has the different elements, so this is on the website.

291

00:36:51.390 --> 00:37:05.370

Stephanie Bogan: You can see a version here that does a nice version, step by step that kind of talks about the steps in the so this firm is really breaking out each element of planning into a module and approaching it in that way, and you just see.

292

00:37:05.400 --> 00:37:11.610



Stephanie Bogan: A different more detailed think analytical engineer types on the right with the bullet points.

293

00:37:12.330 --> 00:37:17.190

Stephanie Bogan: So our goal is to get really clear on what our backstage process and operational system is.

294

00:37:17.550 --> 00:37:26.520

Stephanie Bogan: And then package and present that to clients, so that we can set an expectation that we have the confidence that we can deliver on because, as you do, that Andrew.

295

00:37:26.910 --> 00:37:33.360

Stephanie Bogan: Every single time that you say will be reaching out to you later this week and you do trust equity in the bank Nick.

296

00:37:33.750 --> 00:37:43.200

Stephanie Bogan: When you show them this or something like it, and then you deliver consistent with it their brain is like that Nick guy does what he says he can do we can count on him.

297

00:37:43.770 --> 00:37:57.420

Stephanie Bogan: And that is the trust equity that you use to manage that engagement in that relationship over time and we all know, there are going to be times when you need to draw on that trust equity, so the goal here is to take and create a visual expectation.

298

00:37:58.500 --> 00:38:07.590

Stephanie Bogan: And then the idea is you engage in the process, so these are the steps that we talked through just a little bit earlier, we are huge fans of sending a welcome kit.

299

00:38:08.640 --> 00:38:14.520

Stephanie Bogan: What happens anytime you get a welcome kit let's be honest, you get a box of any kind right yes what's, the first thing that you do.

300

00:38:15.870 --> 00:38:19.650

Adam Cmejla: I got something I got mail, there was a whole lead on that I got you got you got.



301

00:38:20.250 --> 00:38:37.740

Stephanie Bogan: It right to who is it from three recognition valid like there's a lot of right gratitude all that good stuff and the idea here is, you want to make an impression that says this is important, and you matter we're paying attention this is personal.

302

00:38:38.820 --> 00:38:49.080

Stephanie Bogan: So Adams choice of indiana is really clever because his clients are everywhere, but what he's saying is we want you to just get a taste of new feel for us here in indiana.

303

00:38:50.130 --> 00:39:02.520

Stephanie Bogan: Also really system it's very standardized so it's very easy to execute so you want to have a meet the team, you want to share what we call client engagement standards and i'll show you some examples of that.

304

00:39:03.390 --> 00:39:12.420

Stephanie Bogan: A client engagement standard I think Tracy back has was the first person to bring the concept broadly to this face I thought I was like in my early 20s.

305

00:39:13.680 --> 00:39:24.150

Stephanie Bogan: You know this idea of a service menu I think we'd seen it in a vet's office or something, but this idea of setting expectations is the surest way to be able to meet and exceed them.

306

00:39:24.750 --> 00:39:36.930

Stephanie Bogan: If you do notice that expectation everyone else in their brain will 100% guaranteed do it for you and then you're calculating with math that you don't know so one go ahead.

307

00:39:37.320 --> 00:39:52.020

Adam Cmejla: it's a big differentiator because you know what nobody else is doing it, and the idea of it shows from from the again put all of this to the filter of the ux and ui right the user experience and user interface.

308

00:39:53.460 --> 00:40:00.870

Adam Cmejla: We know as advisors, that the technology side of the advice of financial services.

309



00:40:01.800 --> 00:40:07.620

Adam Cmejla: pardon my language here, but I think we all kind of collectively agree that the best word to describe it is that it's cumbersome and that sucks.

310

00:40:08.130 --> 00:40:24.570

Adam Cmejla: And that we, we know that we're going to be subjecting clients to this, unfortunately, because the big big events that we've partnered with some name names, but let's face it, there are clunks in the system it's still an antiquated process insurance estate like it's fun.

311

00:40:25.050 --> 00:40:26.700

Adam Cmejla: it's aligning action with intention.

312

00:40:26.730 --> 00:40:36.900

Adam Cmejla: But my point with, that is, by setting expectations and letting them know not only this is what you can expect from us, but this is what we expect from you.

313

00:40:37.350 --> 00:40:52.980

Adam Cmejla: It drives the commitment of the relationship to the next level it doesn't lead ambiguity it doesn't leave the unknown of So how do I reach out to you five questions who's the best person to call know if you have questions, this is the number to call this is the email address to us.

314

00:40:53.130 --> 00:40:54.810

Adam Cmejla: This is how we prioritize.

315

00:40:55.770 --> 00:41:09.360

Stephanie Bogan: i'm going to pause Adam right there and and white red circle of trust honest moment everyone drop in the chat when you think about the last person that you onboard it so when you're working with now or the last person if it was if not in the moment.

316

00:41:10.470 --> 00:41:16.950

Stephanie Bogan: When they left when you think about what we've discussed what was the expectation, they did you set a clear expectation.

317

00:41:27.300 --> 00:41:28.890

Stephanie Bogan: Looking for yeses or notice here.



318

00:41:28.980 --> 00:41:31.830

Adam Cmejla: I was gonna say it's a it's a ghost in there, we go there, another.

319

00:41:32.070 --> 00:41:42.930

Stephanie Bogan: Writing yes and it's working well, no not really general I found I did, but I could do better, no, no right, so we all know this, but it's really important to acknowledge it for your brain to just say okay.

320

00:41:43.860 --> 00:41:52.170

Stephanie Bogan: i've identified a gap there's an opportunity now what i'm going to ask myself is what do I need to account for right so you've got an overview of the strategy.

321

00:41:52.470 --> 00:42:04.980

Stephanie Bogan: Right engagement and expectations together create a better experience right we're trying to solve for trust equity in the can I count on your question structure we've talked about right the components of it.

322

00:42:05.550 --> 00:42:12.930

Stephanie Bogan: Now, as we go through them it's around, how are you going to think through how you apply this in your office so we're going to break down each of the steps.

323

00:42:13.500 --> 00:42:19.530

Stephanie Bogan: i'd say there's some of these other some questions so we'll start taking those, but we want you to think through this through the lens now as.

324

00:42:20.100 --> 00:42:30.390

Stephanie Bogan: How will this influence impact your change what i'm doing it does not have to be immediately, by the way, if you are working on other priorities you can take these notes set them.

325

00:42:30.750 --> 00:42:35.190

Stephanie Bogan: aside look at them when you next prioritize and this lesson will all be here for you when you're ready.

326



00:42:35.670 --> 00:42:45.300

Stephanie Bogan: So with that I want you to think about the expectation that you did set and now, what I want you to write down on the piece of paper in front of you is what is the expectation that you would like to set.

327

00:42:48.810 --> 00:42:58.620

Stephanie Bogan: And how are you going to set it is it on your website is it a visual is it a bullet list is it a conversation I just want you to capture something.

328

00:43:01.320 --> 00:43:08.460

Stephanie Bogan: And we're going to talk through each of the steps, and then we can take questions or chat with some of you around how you might implement this and what questions you might have.

329

00:43:09.120 --> 00:43:19.170

Adam Cmejla: Love eli's response to that there is a process and i'll follow it, nothing can leave that that can kind of shake the foundation of trust and commitment in.

330

00:43:21.870 --> 00:43:31.320

Adam Cmejla: Then the unknown right like so what's going to happen that like please if if there's one action that you take from this it's to do and make sure that.

331

00:43:31.830 --> 00:43:36.210

Adam Cmejla: The next relationship that you bring on that, even if you even if you're.

332

00:43:36.900 --> 00:43:46.800

Adam Cmejla: Aviation Conference or even if you're building the airplane as you fly and it's going to change right the on the previous line that new client onboarding process was my old version of the link that.

333

00:43:47.130 --> 00:43:53.220

Adam Cmejla: allison put in chat, that is, the current one that we're using we've used that one, for you know year and a half, two years now and it's worked great.

334

00:43:53.580 --> 00:44:06.990

Adam Cmejla: But that doesn't mean that we're not thinking about ways that we can tweak it that is



letting trying to know when they can hear from you frequency and on what that is what I would consider to be the mvp that we want you to walk away from this conversation.

335

00:44:08.130 --> 00:44:17.790

Stephanie Bogan: So imagine that you have a piggy bank and on the side of that piggy bank in your mind I want you to write trust equity can be big purple letters that can have sequence, it can be calligraphy.

336

00:44:18.240 --> 00:44:30.360

Stephanie Bogan: It can be a metal stamp you create your own piggy bank of trust equity when heart when clients are nervous when they have questions about fees when the market struck when they have objections or challenges.

337

00:44:31.320 --> 00:44:45.750

Stephanie Bogan: And you show up their brain is asking itself can I count on you and it's going to it's log felicity and it's checking those trust equity deposits, and it is saying.

338

00:44:46.290 --> 00:44:57.180

Stephanie Bogan: what's the probability that I can count on felicity to deliver in the way that she says, I can count on her, and if you have put in those trust deposits.

339

00:44:58.740 --> 00:45:09.150

Stephanie Bogan: Then their brain will say okay again if there's alignment around values and story, if you haven't you have to work harder you get three phone calls they don't have the confidence.

340

00:45:09.480 --> 00:45:22.620

Stephanie Bogan: That you want to instill in them so step one that's not all going to happen in the welcome packet but you know what is going to happen in the welcome packet you're going to make a distinct impression that you were different, you are professional and that you deliver.

341

00:45:24.060 --> 00:45:24.780

Stephanie Bogan: that's the goal.

342

00:45:25.890 --> 00:45:31.560

Stephanie Bogan: So you can deliver a gift, we always delivered at quantum this you guys get a welcome



packet from us it's assembled and a.

343

00:45:31.860 --> 00:45:38.850

Stephanie Bogan: From a couple places where I would love to write the figuring always that like how much Am I willing to spend, to put it all in one box, but.

344

00:45:39.390 --> 00:45:45.780

Stephanie Bogan: Like it's like twice as much that just doesn't make economic sense right but you're always looking at things through the lens of.

345

00:45:46.170 --> 00:45:58.590

Stephanie Bogan: How can I set this relationship up for success we send you that calendar, because we want you to know when you kick off that this is like an anchor to the work that we're going to do together, because what I know is that calendar.

346

00:45:59.400 --> 00:46:08.280

Stephanie Bogan: Is the bridge between what's in your head and what's in your life, and if it doesn't show up there if we can't teach you that, then everything else is harder like that's an anchor concept.

347

00:46:09.930 --> 00:46:15.810

Stephanie Bogan: So the idea is, what do you want to anchor with your new clients in the beginning, so.

348

00:46:16.320 --> 00:46:27.780

Stephanie Bogan: You can be functional, but you can also be feeling like we have clients all the time that put things in there, like we don't predict the markets but we're great planners and Problem Solving partners so we're going to be here to do those things.

349

00:46:28.140 --> 00:46:43.020

Stephanie Bogan: When we need to you again, you don't have to use that example language, but the goal is if the authentic you were to show up and put something in a packet that said here's what we want you to know about working with us in a way that's going to set us both up for success.

350

00:46:44.310 --> 00:46:52.020

Stephanie Bogan: What would you put in the packet do you guys remember I should have Lisa we got a notice for next year, we need a big Jerry Maguire slide here.



351

00:46:52.530 --> 00:46:53.250

Anybody know.

352

00:46:54.270 --> 00:46:55.200

Stephanie Bogan: Jerry Maguire.

353

00:46:56.730 --> 00:47:03.780

Stephanie Bogan: it's the manifesto, we need to call this the client manifesto, this is what you're saying here's what you can expect from us.

354

00:47:04.440 --> 00:47:15.180

Stephanie Bogan: And it's awesome sauce and, by the way, in order for this partnership to work we're going to need those things where you you're going to have to show up on time you're going to have to get this paperwork you're going to have to share a value system.

355

00:47:15.510 --> 00:47:26.280

Stephanie Bogan: can have to be a good human whatever you want this is your space to create that shared story don't do them or you a disservice by leaving anything out there might be important.

356

00:47:26.790 --> 00:47:35.130

Adam Cmejla: involve your team in this process as well, if this is new to you and you haven't any and you don't have this you know officially outline on any type of document.

357

00:47:35.580 --> 00:47:48.180

Adam Cmejla: involve your team and ask them the language on how they would communicate because their vantage point and what they do for clients and what they're like what they're doing for clients and when they're doing it in the relationship.

358

00:47:49.020 --> 00:48:01.110

Adam Cmejla: Can some I want to say influences it but it's always nice to have another perspective, this is also a great conversation as you're thinking about word smithing this if you're in masterminds these are phenomenal your mastermind can be a phenomenal sounding board for you.

359



00:48:01.530 --> 00:48:12.420

Adam Cmejla: As you're thinking about it, because all the other individuals in your mastermind can not only think of it from an advisor perspective, but they can put themselves and kind of put on that Avatar had a been a client as well yeah.

360

00:48:12.480 --> 00:48:14.130

Stephanie Bogan: and feel free to share them on try.

361

00:48:14.490 --> 00:48:14.700

Stephanie Bogan: The.

362

00:48:15.030 --> 00:48:27.930

Stephanie Bogan: locals are also in the library tanya like me loves to brand things so right, the goal, ultimately, is to take this turn it into client facing deliverables the overview of the process.

363

00:48:28.350 --> 00:48:41.370

Stephanie Bogan: The engagement standards it's a very it's a very productive and positive presentation, because, again as Adam pointed out, if he we set you apart and it's a very nominal expense, so you want to use these to set a clear and common language.

364

00:48:41.670 --> 00:48:51.840

Stephanie Bogan: You want to set the expectation, so that you can deliver on it, if there are any issues, Melissa and the prospect says, or the new client says hey I have a problem with this.

365

00:48:52.230 --> 00:49:02.100

Stephanie Bogan: that's a good thing, this should surface any potential breakdowns on those anchor concepts, how we service how we deal with problems.

366

00:49:02.460 --> 00:49:12.420

Stephanie Bogan: Right when we meet what to expect from our staff how we're going to treat each other, our philosophies around things, so we have clients, for this is the simple one page and I have cleanse with is a booklet.

367

00:49:13.440 --> 00:49:18.360

Stephanie Bogan: That the client has to sign off on tanya is the client also actually science, because we.



368

00:49:19.470 --> 00:49:27.900

Stephanie Bogan: want the client and to actually commit to having read it, and when you ask them to design, something it creates an entirely different level of awareness and presence.

369

00:49:28.290 --> 00:49:29.460

Adam Cmejla: It creates an ownership to it.

370

00:49:29.940 --> 00:49:37.950

Adam Cmejla: It just says that this isn't something this isn't a piece of marketing collateral this isn't just something ooh fluffy piece of another fluffy document.

371

00:49:38.940 --> 00:49:47.460

Adam Cmejla: Is it a legally binding contract Well, no, of course, not you're not you're not positioning to the client that it is, but it is a it's a commitment of the relationship.

372

00:49:48.480 --> 00:49:50.460

Stephanie Bogan: Are funnier than your typical ADB.

373

00:49:50.520 --> 00:49:51.300

Stephanie Bogan: let's go in here.

374

00:49:54.000 --> 00:49:54.270

Adam Cmejla: Paul.

375

00:49:54.540 --> 00:49:55.080

Adam Cmejla: The question.

376

00:49:55.110 --> 00:50:05.910

Adam Cmejla: Does anybody do Oh, I want, I want to before paul's question gets pushed up there, because this is kind of along the engagement standards and what and when a client get that point in the process does anybody do a welcome video.

377



00:50:07.380 --> 00:50:17.400

Adam Cmejla: We we don't the closest the closest thing that i'll speak for me, what we do at our firm is part of our sales prospect process that we tweaked.

378

00:50:17.730 --> 00:50:28.800

Adam Cmejla: Is at the end what we didn't tweak it, but we tweak how we set it up was at the end of the plan presentation we set a plan presentation follow up and that is when we ask the client that's when I basically that's the clothes right.

379

00:50:29.190 --> 00:50:39.870

Adam Cmejla: And so, in that call when a client says yes, that is essentially the video of me welcoming them to the firm in that call I will let them know here's The next step.

380

00:50:40.140 --> 00:50:44.790

Adam Cmejla: here's when you will hear from our team and who's who you'll hear from which is always Kathy.

381

00:50:45.120 --> 00:50:51.330

Adam Cmejla: And then letting them know that their next appointment is going to be with john and essentially handing them off of john because i'm not.

382

00:50:51.720 --> 00:50:56.610

Adam Cmejla: I don't take on client relationships personal anymore so i'm managing and setting those expectations.

383

00:50:56.940 --> 00:51:07.560

Adam Cmejla: But that's not an asynchronous communication that's not a loom video or a bomb bomb video or anything like that, but that's not the end and the other reason we have enough other touch points between now and the next meeting that.

384

00:51:07.980 --> 00:51:15.660

Adam Cmejla: A video I don't think does that we don't need to do that, but there is certainly nothing wrong with hitting record on a loom video and doing a 32nd.

385

00:51:16.110 --> 00:51:25.920



Adam Cmejla: Paul Thank you so much for your commitment to our firm, we are so excited and thrilled to begin partnering with you as we work to align your money with your life's purpose or whatever your, whatever your value prop is.

386

00:51:27.600 --> 00:51:39.780

Stephanie Bogan: yeah we are big fans of welcome videos because again they're brief their personal right, so it really creates a warm and inviting tone to begin with, and as Adam pointed out, you don't always have to be the one doing them.

387

00:51:40.500 --> 00:51:49.650

Stephanie Bogan: So we'd love stories about the firm as a part of the brand which someone should have seen earlier but it's always nice to have someone show up reinforce that brahma brand promise.

388

00:51:50.040 --> 00:51:54.030

Stephanie Bogan: and show up as the guide to help them through it again whether that you or someone else.

389

00:51:54.420 --> 00:52:03.990

Stephanie Bogan: So what's that next step in the process would that really is where you end up in implementation kickoff, so this is where you're going to define and share your implementation process.

390

00:52:04.470 --> 00:52:13.320

Stephanie Bogan: So if you go back if you're reviewing this to those slides that we run it in a little earlier where we're then breaking down the financial planning piece of the process we're looking.

391

00:52:13.620 --> 00:52:18.930

Stephanie Bogan: For a State you're right your investments, then we're looking at this, then we're live so they're making it modular.

392

00:52:19.260 --> 00:52:28.800

Stephanie Bogan: So that this if we're being honest big ambiguous want want want Charlie brown's mom squishy around the edges process that you all know.

393

00:52:29.280 --> 00:52:41.640

Stephanie Bogan: When we as clients walk in we're like Okay, I signed something what happens now



and there's all these pieces and moving parts and most people don't know is that happen quick is that going to happen over a long period of time.

394

00:52:42.090 --> 00:52:50.520

Stephanie Bogan: Are they going to be meeting with you, every week for the next month, are they not going to see for a year, so what we want to do is really define and lay it down that process.

395

00:52:51.000 --> 00:52:58.140

Stephanie Bogan: And then, as Adam pointed out use our tech tools and those the process that we've shared to them to map that whole thing out.

396

00:52:58.200 --> 00:52:59.130

Adam Cmejla: Right, so what.

397

00:52:59.400 --> 00:53:04.170

Stephanie Bogan: you're going to decide what your structure isn't and put that structure in place in your technology.

398

00:53:04.920 --> 00:53:18.000

Adam Cmejla: One other thing that that i've internalized, and this may or may not be true, this is just my bs right, this is my belief structure just in the way and i'm and i'm also saying this from the position of how I would think as a client.

399

00:53:19.260 --> 00:53:27.840

Adam Cmejla: We charge a financial planning fee right and it's not an insignificant financial planning fee as well to become a client it's a 20 \$500 onboarding be.

400

00:53:28.620 --> 00:53:38.130

Adam Cmejla: right away, and so it's different than in a UMP structure where we're transferring assets in that we're debating someone's checking account or charging their credit card so.

401

00:53:38.610 --> 00:53:46.020

Adam Cmejla: If I put myself in the clients shoes I just gave an advisory firm 20 \$500 on my credit card or out of my checking account.



402

00:53:46.590 --> 00:53:55.170

Adam Cmejla: There is a very tangible fields to that dollar into the exchange and so again my own bs my my putting myself in a client's perspective.

403

00:53:55.620 --> 00:54:09.510

Adam Cmejla: I made the commitment I wanted us as a firm to make the commitment to essentially over not really over communicate, but certainly not leave them in the dark hey thanks for 2500 bucks and then crickets and so, if you're charging a financial planning fee.

404

00:54:10.740 --> 00:54:19.080

Adam Cmejla: Take that maybe just into consideration and think of put yourself in the client's perspective, you just collected X dollars in financial planning fee.

405

00:54:20.010 --> 00:54:28.740

Adam Cmejla: Make sure that you're letting them know what the next step is and again Kathy that's all systematized through text expand or CAP that is all Kathy sandbox there.

406

00:54:30.240 --> 00:54:44.880

Adam Cmejla: And and and go back to this presentation and look, I think it was five five or six slides back that behind the scenes timeline that first part kathy's there's four or five bullet points Cathy is very, very transparent with client, yes, right here.

407

00:54:46.740 --> 00:54:57.660

Adam Cmejla: let's see maybe it's the create the dot yeah everything is in Korea, so the top there after step to create email a scheduling link send email send accent like.

408

00:54:58.050 --> 00:55:08.700

Adam Cmejla: All of that she has over communicating, dare I say, with the client in the beginning process, because we want them to know we are committed to you, thank you for your commitment to us here's how we're committed to you.

409

00:55:13.770 --> 00:55:14.490

Adam Cmejla: That was it that was done.

410



00:55:19.050 --> 00:55:29.520

Stephanie Bogan: So to Adams point things like account openings and transfers right, I want you to think about does anybody remember what buying a house used to be like the the amount of paperwork.

411

00:55:30.540 --> 00:55:39.750

Stephanie Bogan: Great the pages and pages and pages and pages, and now we just get the docuSign it was like the best thing ever right click and point clicking point click invoice like that was a game changer.

412

00:55:40.710 --> 00:55:41.160

Adam Cmejla: I mean.

413

00:55:41.340 --> 00:55:45.720

Stephanie Bogan: I'm so where, again, barring changing custodians not that they're not some cool new.

414

00:55:45.750 --> 00:56:01.560

Stephanie Bogan: entrance into the space that we're not fans of but to Adams point there's just a lot of archaic structure in some of those systems, so the goal is to look at everything through the lens of how do you make it easy effective and enjoyable for the client and for you.

415

00:56:04.020 --> 00:56:10.230

Stephanie Bogan: Dr you Doc you saying, are you sending things in a fedex envelope with clear instructions, with an envelope back.

416

00:56:10.680 --> 00:56:21.660

Stephanie Bogan: Like Where are those places I have clients who literally have someone get on the phone and walk through the boring stuff with clients we're going to get on the phone now they have to do another phone obviously a lot of people.

417

00:56:22.350 --> 00:56:33.180

Stephanie Bogan: But they used to have client right as you look at those processes, we have clients come in and the 30 day point with all their paperwork and we go through it and we organize it for them now, we can do all of that electronically.

418

00:56:33.690 --> 00:56:41.370



Stephanie Bogan: But the idea is looking at your clients looking at your staff and team capacity, like what do you have the capacity to do.

419

00:56:41.790 --> 00:56:58.920

Stephanie Bogan: To curate a better experience for your clients and then is Adam shown you, what can you do to curate a very defined structure, an operational system for your team and yourself, so that you can get through the messy middle if we're being honest that's what it is, as quickly as possible.

420

00:56:59.520 --> 00:57:07.410

Adam Cmejla: Kathy will do that with clients, especially if it's a practice owner because everybody's time is valuable right but there's is there, I say.

421

00:57:08.040 --> 00:57:16.890

Adam Cmejla: Extra valuable right just there's no shortage of things on their to do list so measure twice cut once we definitely want to get it right, the first time case in point.

422

00:57:17.220 --> 00:57:25.530

Adam Cmejla: When you're asking clients to fill in their bank account information on docuSign this has been a frustration that Kathy has gone through we've learned this lesson once or twice and so now we.

423

00:57:25.890 --> 00:57:31.950

Adam Cmejla: Again, my my philosophy as a QA engineer in a previous life was what's the root cause of this year, what is happening.

424

00:57:32.460 --> 00:57:40.650

Adam Cmejla: If a client opens up a traditional IRA for backdoor rob we have had clients, unfortunately with their business checking account information in the docuSign envelope.

425

00:57:40.980 --> 00:57:45.960

Adam Cmejla: You don't want to put business checking information in a personal accounts and now it's now it's an I go right Nick.

426

00:57:46.350 --> 00:57:53.430

Adam Cmejla: And now Kathy so go back to the client again, and it has to be another Doc you sign up it's inconvenient at best for everybody.



427

00:57:53.700 --> 00:58:02.610

Adam Cmejla: And so, when there are there when there are those things as your team goes through the account opening process if there is any room for.

428

00:58:03.150 --> 00:58:10.470

Adam Cmejla: Interpretation right your social is your social driver's license is your driver's license right, you can create those fields and docusign to have the client build that in.

429

00:58:10.740 --> 00:58:19.950

Adam Cmejla: But if there's anything that's open for interpretation spell those out in the email create it or do what Kathy will do sometimes on next level up.

430

00:58:20.220 --> 00:58:32.580

Adam Cmejla: Have that conversation with the client and walk them through that create systems and create stopgaps to ensure that you're leaving as much ambiguity out of the process as possible, I know that's easy for me to say in a webinar right here on.

431

00:58:33.150 --> 00:58:41.670

Adam Cmejla: zoom call whatever but but I implore you to make sure to go through your process with a fine tooth comb and try and remove it big ambiguity as much as possible.

432

00:58:42.510 --> 00:58:51.720

Stephanie Bogan: We have a private client we did a piece for words literally so graphic because again people tend to be able to follow conventions and stories, it has a picture of every platform.

433

00:58:52.230 --> 00:59:00.510

Stephanie Bogan: Their login for the platform what's in that platform, and this is the part I felt really good about it has a picture of the team Member in charge.

434

00:59:00.600 --> 00:59:07.080

Stephanie Bogan: Of that, like who's the contact person if they have problems with that platform because they're big enough to have multiple people.

435



00:59:07.470 --> 00:59:18.030

Stephanie Bogan: In multiple platforms and it's part of their client engagement standards and as part of that 30 day checking where it's like here's the stuff that you're going to use if you can get someone's hands on technology.

436

00:59:18.900 --> 00:59:21.540

Stephanie Bogan: they're much more likely to use it, if you say login.

437

00:59:21.990 --> 00:59:31.980

Stephanie Bogan: It will sit on the corner of their desk forever if someone on your team says we're going to do that welcome check in, and I want to walk you through the paperwork in the platforms that you're going to be using it's really boring but we want to make it as.

438

00:59:32.010 --> 00:59:33.810

Stephanie Bogan: easy as possible, as we can, for you.

439

00:59:34.320 --> 00:59:46.110

Stephanie Bogan: You can now we just have people doing a lot of that and welcome videos but again just depending on the size and nature of your firm it's about how deep, you can go with that personal experience so don't my point there is don't underestimate.

440

00:59:46.470 --> 00:59:51.600

Stephanie Bogan: What you can put on a piece of paper throw a pretty picture around and give some guidance around.

441

00:59:52.020 --> 00:59:57.750

Stephanie Bogan: That lets people know what's happening was like hey in the first 30 days like quick any old days we used to give people a box.

442

00:59:58.140 --> 01:00:05.370

Stephanie Bogan: And just tell them put everything in this box and just bring it in and your 30 day meeting we're going to organize it for you and we're going to tell it like now it's all electronic but.

443

01:00:06.600 --> 01:00:12.030

Adam Cmejla: step can I share my screen real quick i'll show what we what we share with our clients.



444

01:00:13.140 --> 01:00:17.250

Adam Cmejla: This is our version of the resource guide I love the idea of time to picture to.

445

01:00:18.120 --> 01:00:26.040

Adam Cmejla: To to who on the team would be responsible for this, so this is the online client resource guide that we send as part of our as part of our onboarding process to clients.

446

01:00:27.000 --> 01:00:30.810

Adam Cmejla: Again, something that we in partnership with our graphics designer help them create.

447

01:00:31.680 --> 01:00:41.580

Adam Cmejla: Again, will always be here to get like we're just seeing every opportunity of communication is seeking with a client who you are what you do for them, and why they are partnering with you.

448

01:00:41.970 --> 01:00:54.480

Adam Cmejla: But, just in case right and then so down here below we've given basically the four different tools that we use and I love the fact that we have to create this why we can't have one centralized location for all of their financial life.

449

01:00:55.650 --> 01:01:00.870

Adam Cmejla: It frustrates me, so I do the best I can with what I have even though I know what we have is the best.

450

01:01:01.110 --> 01:01:06.750

Adam Cmejla: And this is the next best thing, so we send this to them, and these are billable fields down here, so the client can type in your username.

451

01:01:06.990 --> 01:01:19.620

Adam Cmejla: They can type in their password we have a whole email that goes out that says here's what you can do print it off save it do it, this is a saleable PDF, and so this is something that we can all send us the House, and she can put this in the library if people want to use it as a benchmark.

452



01:01:22.530 --> 01:01:25.590

Stephanie Bogan: So that's it doesn't come back to me automatically direct to do some.

453

01:01:25.920 --> 01:01:26.790

Adam Cmejla: You have to reshare.

454

01:01:27.240 --> 01:01:28.710

Adam Cmejla: All right, sorry.

455

01:01:29.100 --> 01:01:29.730

Stephanie Bogan: No worries.

456

01:01:31.530 --> 01:01:32.820

Adam Cmejla: hey look at that yep.

457

01:01:33.060 --> 01:01:41.940

Stephanie Bogan: So, again just more examples of how it is the great unknown and we literally take a client on same thing with centers of influence, by the way.

458

01:01:42.240 --> 01:01:48.180

Stephanie Bogan: This is the biggest breakdown in building Center of influence relationships, two things one you show up.

459

01:01:48.750 --> 01:01:54.660

Stephanie Bogan: You tell them a bunch of great stuff and then you disappear on them and wonder why they don't send referrals much of the time separate conversation.

460

01:01:54.960 --> 01:02:03.870

Stephanie Bogan: But if someone actually gets to the point where they invoke the greatest act of trust that they can invoke on your behalf, which is sending one of their valued clients to you.

461

01:02:04.230 --> 01:02:14.850

Stephanie Bogan: What I can tell you is that about 89% of the time, the responses, a darker and to thank you know for email, in this case, and nothing else.



462

01:02:15.390 --> 01:02:22.140

Stephanie Bogan: And so I want you to think about what the opportunity gap, there is between thanks for the referral and.

463

01:02:22.590 --> 01:02:33.000

Stephanie Bogan: Let me make you a trusted team Member and part of the process, so when new when a client comes on, and they have an advisory team around them right there attorneys their insurance right there by the other advisors.

464

01:02:33.480 --> 01:02:43.950

Stephanie Bogan: This is an opportunity to reach out and make those connections so very much like Adam talked about it, what you're seeing in his practice is all of these concepts have gone from best practice to in practice.

465

01:02:44.460 --> 01:02:51.690

Stephanie Bogan: Back to best practice, because now they're showing up in this nice presentation form, so when that Center of influence outreach is made.

466

01:02:52.380 --> 01:03:01.620

Stephanie Bogan: Imagine that you're then sending a packet that says, welcome to the firm rate as a trusted partner you're a partner of one of our clients, which makes you a partner of us.

467

01:03:02.040 --> 01:03:13.770

Stephanie Bogan: This is how our firm operates there's your new client package to the Center of influence, explaining your new client process and include Center of influence outreach it has all your awesome deliverables, and all this cool stuff.

468

01:03:14.130 --> 01:03:25.830

Stephanie Bogan: And it says we'd like to schedule a time to connect with you to learn a little bit more about your history with the client any issues that you might be aware of that might be a benefit to them in our relationship and we'd love to get to know you blah blah blah.

469

01:03:26.700 --> 01:03:27.930

Stephanie Bogan: they're going to go bad Andrew.



470

01:03:29.790 --> 01:03:32.130

Stephanie Bogan: Never Angela that comfortable.

471

01:03:33.660 --> 01:03:42.120

Stephanie Bogan: Not only should it be a comfortable way to reach out, it should be a kick ass confident way to reach out, you should be like oh my gosh look at me nobody's doing these things.

472

01:03:42.810 --> 01:03:52.140

Stephanie Bogan: So, as you build the client onboarding process the invitation is to translate that just into some coi pieces minor changes if any.

473

01:03:52.620 --> 01:04:01.620

Stephanie Bogan: and make sure that that's a part of your process and then is the client is going through onboarding that you have an onboarding that you have a process you're taking their centers of influence through.

474

01:04:02.280 --> 01:04:17.370

Stephanie Bogan: It doesn't have to be a weekly update, is it a monthly update, for the first quarter, is it a quarterly update, is it an it like what is it that's going to demonstrate to that Center of influence that you really are different and that you deliver.

475

01:04:18.390 --> 01:04:25.410

Stephanie Bogan: Because if they believe that you're different and that you deliver they will, if you are a fit relative to their clients and who you're focusing on you'll get more clients from them.

476

01:04:26.700 --> 01:04:35.040

Stephanie Bogan: So don't forget about the centers of influence and the onboarding process, they tend to get set to the side and there's just a lot of opportunities sitting on the sidelines.

477

01:04:36.240 --> 01:04:42.750

Stephanie Bogan: And I want to pause here, I see some questions Teresa I saw a question in slide oh sorry about that.

478



01:04:43.440 --> 01:04:59.370

Stephanie Bogan: And we'll get to the others in a moment i'm trying to stay on topic to the regular ones here right, what do you guys think Andrew is you think about this what's one change that you could think to make to your onboarding process to make it easier, more effective, more enjoyable for clients.

479

01:05:00.540 --> 01:05:02.340

Andrew Hatherley: Well i'm i'm a big believer in.

480

01:05:03.630 --> 01:05:07.110

Andrew Hatherley: In mail and receiving something in the mail people love that.

481

01:05:07.440 --> 01:05:07.680

and

482

01:05:11.220 --> 01:05:24.690

Andrew Hatherley: So welcome package is not something that i've done in the past, and this is causing me to rethink that and gift i'm not sure I don't know indiana resonates with me, but something.

483

01:05:26.400 --> 01:05:33.210

Andrew Hatherley: I think makes sense and the coi thing resonates with me as well it's if there's any that's a very good reason to do this.

484

01:05:34.260 --> 01:05:45.780

Stephanie Bogan: Well it's certainly confidence inspiring when you can tell people what to expect from you, it suggests that you're proactive professional and you're going to deliver it because 90% of the time they get the great unknown.

485

01:05:46.650 --> 01:05:54.600

Stephanie Bogan: So the more that we can set expectations, the more that we're in a position to set everyone up for success so some good takeaways there Jamie What about you.

486

01:05:55.650 --> 01:05:59.760

Stephanie Bogan: what's something that you might change as a result of what you've heard so far, or any questions.



487

01:06:00.900 --> 01:06:01.320

Jamie Milne: Thank you.

488

01:06:02.520 --> 01:06:14.250

Jamie Milne: The aspect that I couldn't pick up and put in place is actually creating a workflow that is better than the one we have and incorporates a bunch of the things that i've just heard.

489

01:06:16.080 --> 01:06:29.460

Stephanie Bogan: For those of you who are thinking of sitting down with the team and creating workflow anyone anyone going to do that, over the next week or month or so right what's your process works your sandwiches or what's your process going to be she go.

490

01:06:31.590 --> 01:06:38.610

Stephanie Bogan: felicity There you are, as you think about sitting like how are you going to present this to your team, and what are you going to map out with them.

491

01:06:40.080 --> 01:06:47.100

Felicity Cooper: Oh well, I think our first thing is to actually note down what we're doing at the moment and then what we'd like.

492

01:06:47.940 --> 01:06:57.360

Felicity Cooper: To look like and then try and fill that gap, but the idea in the middle, we don't really have a process at all we'll use more clients and onboarding process and we do anywhere else okay.

493

01:06:57.420 --> 01:06:57.780

well.

494

01:06:59.550 --> 01:07:01.110

Adam Cmejla: You said you lose clients and the onboarding.

495

01:07:01.110 --> 01:07:03.780

Felicity Cooper: Probably wants and the onboarding process.

496



01:07:04.110 --> 01:07:11.820

Stephanie Bogan: So one no judgment there because you're obviously right a quality person trying to do, quality work so that tells us that there's a process breakdown.

497

01:07:12.240 --> 01:07:17.070

Stephanie Bogan: People breakdown or a platform breakdown or some combination of all of those three.

498

01:07:17.640 --> 01:07:25.440

Stephanie Bogan: And so felicity everything that we've shared will 100% solid for that, because the real issue is that the trust is breaking down.

499

01:07:25.860 --> 01:07:37.500

Stephanie Bogan: Really rapidly like somewhere between we really like you and think you can help it's, never mind these guys aren't delivering so to your point when there's breakdowns it's not a bad thing.

500

01:07:37.920 --> 01:07:43.950

Stephanie Bogan: it's a good thing in that contrast tells us that there's something that we needs to be tended to so for felicity.

501

01:07:44.280 --> 01:07:53.460

Stephanie Bogan: or any of you, even if it's not that extreme it's a phenomenal opportunity to go back and do one of those breakdown briefs you here is talking about get on the whiteboard with the team.

502

01:07:53.760 --> 01:08:04.260

Stephanie Bogan: No blame no judgment just if we're clients, what are we thinking, what are we what's our midst, the behavior we're experiencing what what you know how what's going on.

503

01:08:04.830 --> 01:08:14.340

Stephanie Bogan: what's working what's not working, identify those breakdowns felicity so that you can surface with the team, how to solve for them like what are the most pressing breakdowns.

504

01:08:14.910 --> 01:08:22.320

Stephanie Bogan: Is it setting expectations if you're overwhelmed and you've gotten over committed it's okay to say.



505

01:08:22.860 --> 01:08:30.570

Stephanie Bogan: You know there's been a huge increase in the number of people reaching out to us for financial planning because, quite honestly I think quoted made everyone realize.

506

01:08:30.900 --> 01:08:42.390

Stephanie Bogan: That they really want to align their money with their life, and we want to make sure that we put everyone through a thoughtful intelligent process and, as a result, right Oh, you know this is going to take the next six months, but here's the process.

507

01:08:43.020 --> 01:08:57.840

Stephanie Bogan: or like Adams done, you can put a waiting list in place so those are any pipeline that distributes water, energy, or anything, it has a regulator valve and if we're putting too much to the pipeline in terms of what it can handle then you're going to have those breakdowns.

508

01:08:59.400 --> 01:09:03.300

Adam Cmejla: Do the time do the time study with your team as well, this is something that we learned and again.

509

01:09:03.510 --> 01:09:14.820

Adam Cmejla: High quality problem that needed to be solved in our firm but we ended up bringing on too many relationships all at once, so we had to do a time study with John and with Cathy to realize what the time commitment for each of them respectively wasn't the process.

510

01:09:15.270 --> 01:09:23.070

Adam Cmejla: And how that mixed into the other daily tasks that they have for that for existing clients right because.

511

01:09:23.970 --> 01:09:31.890

Adam Cmejla: We I know we're all about compartmentalizing and doing deep work and surges and reviews and things like that, but.

512

01:09:32.310 --> 01:09:36.840

Adam Cmejla: That doesn't mean that like doesn't happen for our clients in between normally scheduled search.



513

01:09:37.170 --> 01:09:48.750

Adam Cmejla: And so what we ended up doing is and we certainly never want to compromise the service to existing clients because we're focused on onboarding just like you don't want to compromise onboarding because you're focused on the prospecting side.

514

01:09:49.110 --> 01:09:53.820

Adam Cmejla: All of those have to be compartmentalised and understanding the time commitment for each one of them.

515

01:09:54.120 --> 01:10:00.300

Adam Cmejla: But also understanding the influence that it has, on the other sections of your practice right you don't want to cannibalize one section for the other.

516

01:10:00.630 --> 01:10:19.710

Adam Cmejla: And so, understand in your firm what is that to stephanie's point you can throttle you can govern how many relationships, you can bring on given the timeline that you have and that's where again utilizing a CRM utilizing some type of timeline based process of saying, I would say, probably.

517

01:10:20.970 --> 01:10:30.300

Adam Cmejla: I don't want to say a half I bet a third of clients or could be a third of prospects ask, and this is something that, as i'm coaching and sharing this with all you right now.

518

01:10:31.080 --> 01:10:38.430

Adam Cmejla: That I should probably do a better job of clarifying up front with existing relationships that are considering working with our firm How long does this process take.

519

01:10:39.360 --> 01:10:47.760

Adam Cmejla: They will ask is this a three month process is this a six month right like we give the timeline we have our new client onboarding process that again.

520

01:10:48.660 --> 01:10:59.040

Adam Cmejla: allison put the link there in chat so you can scroll up and pick the classes, but notice that there's no dates on that it says, I think, in in fine print they're actually it does say that it does say the date there.



521

01:11:00.090 --> 01:11:09.840

Adam Cmejla: Are it does say the timeline if my memory serves me right, because we think I know my exact process but understand your capacity that's The lesson there understand the capacity of your firm.

522

01:11:11.490 --> 01:11:17.130

Adam Cmejla: And there's no shame in telling people more people than you can into the pipeline, then you can push out.

523

01:11:17.550 --> 01:11:27.120

Stephanie Bogan: So things that you're going to need publicity that you can all do as you map this out is one, you need to track, this is not going to be girl asked the guys on my iPad.

524

01:11:28.890 --> 01:11:29.370

Adam Cmejla: This.

525

01:11:29.820 --> 01:11:36.300

Stephanie Bogan: steffi drone right, so you need the tractor it so imagine Adams drawing right, you have to track that track is your system.

526

01:11:36.720 --> 01:11:42.330

Stephanie Bogan: Then you're going to have the steps in that process, you might have wait weekly check ins in between.

527

01:11:43.140 --> 01:11:51.030

Stephanie Bogan: And then to your point felicity What are those breakdowns like What is all this stuff that needs to happen under each step and who needs to do that stuff.

528

01:11:51.540 --> 01:12:02.820

Stephanie Bogan: that's where those workflows really are valuable right each of the communications each of the workflows themselves the follow up can all be embedded there but step one is to map that out with the team.

529

01:12:03.600 --> 01:12:12.360



Stephanie Bogan: And then the last part of that to Adams point is to lay out the timeline for that to earlier discussion is that a 12 month process is that a 90 day process.

530

01:12:12.630 --> 01:12:20.190

Stephanie Bogan: so that you can manage the client expectations around what happens when it happens, who would happens with and how it happens.

531

01:12:20.820 --> 01:12:31.470

Stephanie Bogan: we're going to get together in 30 days we're going to get together and you know it's okay to say hey the next you know 45 to 60 days are going to be really quiet companies are super backed up preparing paperwork right now.

532

01:12:31.860 --> 01:12:36.240

Stephanie Bogan: i'll be honest half the time we get it it's not right we're going to spend time double checking it so.

533

01:12:36.780 --> 01:12:46.770

Stephanie Bogan: You know, so what is the expectation that you want to set and simply set it so felicity does that help in terms of going back and thinking up with the team about the next steps that you can take.

534

01:12:47.580 --> 01:13:00.570

Felicity Cooper: It really does love me one of our problems is we just said to hire an expectation and clients want interest now and then i'll give that it takes 90 days it takes forever to get all of this yeah.

535

01:13:02.430 --> 01:13:06.420

Stephanie Bogan: Just that extra to say hey you know, the first 90 days are going to be the most intense.

536

01:13:06.780 --> 01:13:13.710

Stephanie Bogan: right but, but they also require the most focused so we're going to need this this and this from you, right after that each quarter we're going to be picking one thing.

537

01:13:14.100 --> 01:13:23.070

Stephanie Bogan: Or what I like to do for each client and again depending on your firm client size right now it's not necessarily for every client, as you can map out the visual of that process for the client.



538

01:13:24.480 --> 01:13:24.750

Stephanie Bogan: Right.

539

01:13:25.440 --> 01:13:32.370

Stephanie Bogan: christie's on the call, but she was working on a visual for her one page plan so that, as she actually went through the plan with the client over time.

540

01:13:32.940 --> 01:13:47.970

Stephanie Bogan: Right each component of that visual starts to get filled out and that's a very powerful tool in terms of showing clients progress and completion over time of that upfront work if that's something that you can get to Andrew are you high five in that or you have a question.

541

01:13:48.630 --> 01:14:00.630

Andrew Hatherley: Now That said, I wanted to follow on what felicity was saying, because actually i'm worried right now that I might be losing a good client in the onboarding process and.

542

01:14:01.560 --> 01:14:11.730

Andrew Hatherley: he's a like 39 year old C suite executive which is not typical of my clients, but he was referred by another, a typical client C suite executive.

543

01:14:12.270 --> 01:14:31.320

Andrew Hatherley: And it's been a month now, and I don't have the paperwork back and okay MIA culpa i'm embarrassed to admit i've never used docusign most of my clients are retirees over 50 and that's certainly my my niche well it's more niche II than that but anyway.

544

01:14:32.580 --> 01:14:40.980

Andrew Hatherley: So i'm worried what please let's be let's have a come to Jesus moment here, am I am I in the dark ages for not using.

545

01:14:40.980 --> 01:14:42.630

Adam Cmejla: docusign yeah cuz I.

546

01:14:43.080 --> 01:14:45.780



Adam Cmejla: feel like i'm losing Oh yes, yes, yes yeah.

547

01:14:47.100 --> 01:14:47.490

Stephanie Bogan: I had.

548

01:14:47.940 --> 01:14:52.770

Stephanie Bogan: A client there right now I would be rubbing them together to start a fire and that would be my.

549

01:14:52.770 --> 01:14:53.610

example.

550

01:14:56.250 --> 01:14:56.610

Adam Cmejla: Has.

551

01:14:57.480 --> 01:14:59.370

Adam Cmejla: That is going to be as someone that is going to be turning.

552

01:14:59.430 --> 01:15:03.240

Adam Cmejla: 40 in a month and a half, I would leave you.

553

01:15:04.260 --> 01:15:05.160

Andrew Hatherley: i'm sorry, you would what.

554

01:15:05.760 --> 01:15:08.160

Adam Cmejla: I would leave you I would, if you sent me paperwork.

555

01:15:09.600 --> 01:15:20.370

Adam Cmejla: Now yeah I know there's another advisor out there that can make my life easier, especially a C suite individual like I don't mean to I don't mean to throw shade and be very harsh and this is a safe space and we can be.

556



01:15:20.370 --> 01:15:21.090

Andrew Hatherley: blown off.

557

01:15:22.050 --> 01:15:23.340

Andrew Hatherley: My vulnerability.

558

01:15:23.370 --> 01:15:27.330

Adam Cmejla: yeah yeah there's there's a bs system there in your mindset.

559

01:15:27.420 --> 01:15:34.560

Adam Cmejla: Of that, just because my clients over 50 that I can stay read it in my old ways of doing paper because it's what I know and it's what i'm familiar with.

560

01:15:36.270 --> 01:15:49.380

Andrew Hatherley: Okay, I hear you and I guess, one of the problems is that i've got i'm an IRA i've got my own IRA so i've got I know you're gonna tell me, this is not a problem i've got my own documents and i've got my TD ameritrade.

561

01:15:49.590 --> 01:15:49.890

Andrew Hatherley: yep.

562

01:15:50.580 --> 01:15:51.600

Adam Cmejla: that's not a problem doesn't.

563

01:15:51.840 --> 01:15:58.440

Adam Cmejla: know all of our documents are loaded in laser APP WiFi laser up again, I know don't ask me how to do this, I know we've done it.

564

01:15:59.610 --> 01:16:03.870

Adam Cmejla: The combination of laser APP and docusign make it.

565

01:16:05.040 --> 01:16:10.440

Adam Cmejla: We have all of our aims, all of our advisory agreements our financial planning engagement all of that can be populated docusign.



566

01:16:10.920 --> 01:16:13.260

Andrew Hatherley: OK, I see in the chat Now people are piling on.

567

01:16:13.500 --> 01:16:14.610

Andrew Hatherley: I don't believe.

568

01:16:15.960 --> 01:16:17.040

Andrew Hatherley: I don't believe for a.

569

01:16:17.040 --> 01:16:18.000

Adam Cmejla: maze and arrows.

570

01:16:18.630 --> 01:16:24.960

Andrew Hatherley: don't believe for a minute that the typical 93 year old client wants to use docuSign
i'm sorry i'm sorry.

571

01:16:26.460 --> 01:16:26.790

Adam Cmejla: well.

572

01:16:27.090 --> 01:16:27.930

Adam Cmejla: Maybe so.

573

01:16:28.050 --> 01:16:34.020

Adam Cmejla: aggressive let's let's not manage to the exception there 93 might be the exception, but
in.

574

01:16:34.500 --> 01:16:42.840

Adam Cmejla: This might be the extreme version of it, but nobody wanted the iPhone but Steve Jobs
made the iPhone nobody wanted the model T but Henry Ford created the model T that.

575

01:16:43.710 --> 01:16:52.230



Adam Cmejla: Because i'm not saying that we're all visionaries here and creating something that doesn't exist anymore, but I think it's, dare I say, dangerous as the.

576

01:16:52.620 --> 01:17:05.580

Adam Cmejla: Business of advice and financial products, so to speak, continued to become monetized that the user experience and user interface the ui and ux matters more and more with every.

577

01:17:05.730 --> 01:17:09.030

Adam Cmejla: month and year that goes on, and this is.

578

01:17:10.140 --> 01:17:20.190

Adam Cmejla: Is it going to be, is it going to be something to change yes and it's going to be something that needs to be addressed it's going to be something that's going to require change and a little bit of heavy lifting on your end the beginning but yeah.

579

01:17:20.250 --> 01:17:20.760

Adam Cmejla: I hear me.

580

01:17:21.540 --> 01:17:22.080

Andrew Hatherley: I hear you.

581

01:17:22.260 --> 01:17:29.130

Stephanie Bogan: Well, and if you are using paperwork one you can make that shift certainly to if you are still using paper.

582

01:17:29.400 --> 01:17:42.000

Stephanie Bogan: The underlying problem here is lack of action at this point, which is okay now this guy's not returning my paperwork, which is, in my experience, one of the places that the whole process falls down because we're not getting that paperwork back.

583

01:17:42.330 --> 01:17:43.590

Adam Cmejla: How did you send the paperwork to.

584

01:17:43.590 --> 01:17:44.100



Adam Cmejla: him Andrew.

585

01:17:44.970 --> 01:17:45.600

In the mail.

586

01:17:46.650 --> 01:17:47.910

Adam Cmejla: With a return envelope.

587

01:17:48.450 --> 01:17:58.860

Adam Cmejla: Yes, with tracking nope Okay, so the bet the next best thing that you can do if you're gonna if you do have anything that needs to get signed.

588

01:17:59.160 --> 01:18:13.650

Adam Cmejla: If a client is signing, something that has that much it, you know that a paper can have account numbers social his driver's license statements, possibly a return envelope is great make sure that it's priority mail and or fedex.

589

01:18:13.710 --> 01:18:17.100

Andrew Hatherley: You know here's the deal here's the deal, they went to California.

590

01:18:17.130 --> 01:18:21.210

Andrew Hatherley: For a month because it's hot in Las Vegas right now sure so.

591

01:18:22.350 --> 01:18:23.550

Adam Cmejla: what's your team look like Andrew.

592

01:18:24.240 --> 01:18:25.020

Andrew Hatherley: you're looking at it.

593

01:18:26.640 --> 01:18:31.020

Adam Cmejla: Okay, so there's another prop okay okay I don't want to dive too deep down the rabbit hole here.



594

01:18:33.000 --> 01:18:43.470

Stephanie Bogan: Let me give you just a quick bit of advice that has been helpful when working with high end right high net worth highly motivated people right Taipei go go go right executives, etc.

595

01:18:43.950 --> 01:18:45.210

Stephanie Bogan: Always schedule, the next step.

596

01:18:46.200 --> 01:18:57.270

Stephanie Bogan: Because this is always the stuff that's important not urgent it goes on the side of the desk and it doesn't mean that I don't want to do it, it just means i'm going to get around to that, and you want to have that conversation, so I sat down with the client once.

597

01:18:57.870 --> 01:19:09.870

Stephanie Bogan: Their average client was about \$200 million and the biggest problem they had was that the sales, the whole process took like four ever, as you can imagine, and so one of the changes that we made it works with all clients, regardless of size.

598

01:19:10.440 --> 01:19:21.240

Stephanie Bogan: Is we simply set the expectation, as we get started there's going to be right over the next 90 days there's going to be a certain amount of right that you're going to get expectation expectation i'm going to send a packet of forms to you.

599

01:19:21.630 --> 01:19:31.530

Stephanie Bogan: they're going to come with return envelope you're going to go through and sign them oftentimes clients will have questions there may be things that we need to follow up on, so can we schedule a meeting you know 15 minutes.

600

01:19:31.950 --> 01:19:38.820

Stephanie Bogan: A quick call 15 minutes a week from now to make sure that you've gotten them see if you have any questions and make it easy for you to put them in the envelope and send it back would that be okay.

601

01:19:39.390 --> 01:19:54.330

Stephanie Bogan: If you do that nine times out of 1099 times out of 100 the person will say sure, in



which case as much as possible right you pull out the calendar you say great right is the same time, next week, work and you try and get literally just a 15 minute call on the calendar.

602

01:19:55.440 --> 01:20:04.920

Stephanie Bogan: To move things forward if they say no say great i'll follow up in a week, if I haven't gotten the paperwork back just want to make sure you have answers to any questions you have and make sure we can move this process forward.

603

01:20:05.460 --> 01:20:13.740

Stephanie Bogan: I know it's important, and I know that this is one of the things that tends to get set aside so we're going to be following up with you every single Friday to make sure that we've either got the paperwork.

604

01:20:13.980 --> 01:20:17.460

Stephanie Bogan: can answer your questions or can be working on whatever's next does that sound good with you.

605

01:20:18.210 --> 01:20:25.470

Stephanie Bogan: Yes, now it's a little harder Andrew to go back now and say hey look like, before I think until I get this back.

606

01:20:26.010 --> 01:20:31.440

Stephanie Bogan: But I understand that you can go back to him insert that message they're also at a town and they're busy.

607

01:20:31.740 --> 01:20:39.360

Stephanie Bogan: it's okay to call and say hey I know this is important to you, I sent out the paperwork, because I wanted to make sure that we got things moving, I also know that you're out of town.

608

01:20:39.660 --> 01:20:49.410

Stephanie Bogan: That you're enjoying California, right now, do you want me to follow up you know follow up now, or do you want to follow up when you get back i'd love to just get a quick time on the calendar, so I can answer any questions.

609

01:20:49.800 --> 01:20:53.040



Stephanie Bogan: and follow up on our next steps, the team and I are ready to get moving when you are.

610

01:20:54.570 --> 01:20:59.790

Stephanie Bogan: Various yeah right to bring him back into the fold and they might just be out for the summer that does tend.

611

01:21:00.060 --> 01:21:02.070

Andrew Hatherley: To he did he didn't respond.

612

01:21:02.730 --> 01:21:13.230

Andrew Hatherley: And we texted and I said just send the documents when get back to town first week of August, but I gotta gotta gotta get this 21st century here, I know that.

613

01:21:14.280 --> 01:21:17.640

Stephanie Bogan: So one notice that Andrew could adjust you all can set the.

614

01:21:17.670 --> 01:21:23.880

Stephanie Bogan: Expectations if you want to make sure that you keep the process moving along just keep setting calls or steps in.

615

01:21:23.880 --> 01:21:27.750

Stephanie Bogan: The process, particularly on the paperwork side if you're doing it that way.

616

01:21:30.000 --> 01:21:31.200

Stephanie Bogan: All right, does that help Andrew.

617

01:21:32.700 --> 01:21:34.500

Andrew Hatherley: Yes, thank you you're welcome.

618

01:21:35.070 --> 01:21:44.040

Stephanie Bogan: Alright, so plan implementation we've talked a bit about this in terms of how you're going to approach the work or do you have a laundry list of work that you're getting through.



619

01:21:44.460 --> 01:21:54.270

Stephanie Bogan: In a really intense three or four month period, are you breaking it out into projects module by module and that's going to depend very largely on your firm the size of your staff.

620

01:21:54.570 --> 01:22:02.190

Stephanie Bogan: The types of clients, that you have in your personal approach but what's important here is that no different than in the service model, you have.

621

01:22:02.550 --> 01:22:11.970

Stephanie Bogan: The steps in the structure put in place for each of those steps reviewing the insurance, looking at the estate planning right looking at their practice documents as part of Adams process their.

622

01:22:12.450 --> 01:22:23.850

Stephanie Bogan: workflows for each of those so going back to felicities you know mapping out the process with the team once you're clear on breakdowns in the process, you can map out what that track looks like.

623

01:22:24.360 --> 01:22:30.930

Stephanie Bogan: When you want those things to happen and once you get that mapped out and and all of the client facing pieces ready.

624

01:22:31.560 --> 01:22:38.640

Stephanie Bogan: Very much as Adams done, what is it now at workflows Adam like you start to build those workflows for each of the modules.

625

01:22:39.240 --> 01:22:47.190

Stephanie Bogan: When we do tax planning here's the checklist then it goes into the CRM and a workflow so that literally gets to the point where, when Kathy.

626

01:22:47.520 --> 01:22:53.280

Stephanie Bogan: knows that the client what's coming next is that button gets clicked and that's the work stream that gets done when that work streams done.

627

01:22:53.700 --> 01:23:03.720



Stephanie Bogan: Right or the next one gets clicked, so this is taking all this stuff that gets dropped into this messy middle and organizing it into boxes.

628

01:23:04.140 --> 01:23:15.720

Stephanie Bogan: What are the boxes, we gather client paperwork we write need this information, we do estate planning, we do insurance right So what are all those pieces that you can map on to that track.

629

01:23:16.440 --> 01:23:26.250

Stephanie Bogan: Those are the steps and then, when you sit with yourself or your teams it's defining what are the actions and steps right who does what, when and how is each of those functions.

630

01:23:27.600 --> 01:23:38.790

Stephanie Bogan: So plan implementation is that the meeting, the communication with the client it's the behind the scenes work that you're actually doing and it's the Center of influence and the relationship that you're developing there.

631

01:23:41.550 --> 01:23:52.500

Stephanie Bogan: As we've talked about step four is along the way you're going to be doing progress reviews i'm a fan of weekly emails again not not into perpetuity unless it's part of your video communication.

632

01:23:53.190 --> 01:24:01.710

Stephanie Bogan: right but hey this week we just wanted to reach out and let you know that your account transfers are on track emails are great one of my favorite tools these days are videos.

633

01:24:02.190 --> 01:24:11.940

Stephanie Bogan: So again, video has the ability to deepen that relationship and a more personal way than an email you get tone, you get style you get inflection you get feeling.

634

01:24:12.540 --> 01:24:22.050

Stephanie Bogan: So if you can simply even if you're not on video if you've got the image of you videos great open your room and say hey it's Andrew I just right or it's.

635

01:24:22.530 --> 01:24:29.970

Stephanie Bogan: changed julie's assistant, I just wanted to write it's Friday follow up reading here at the



firm and I just wanted to reach out let you know that your account transfers are on track.

636

01:24:30.330 --> 01:24:41.310

Stephanie Bogan: You should be getting some paperwork in your inbox go ahead and ignore that we'd love to schedule your next meeting to go over your accounts that's that 90 day meeting that we talked about to help you navigate the resources that be okay.

637

01:24:41.670 --> 01:24:50.310

Stephanie Bogan: there's a calendar link in the email that this videos and please click it so when get some time on calendar is always flustered for feel free to call us if we can answer any questions for you.

638

01:24:51.180 --> 01:25:03.210

Stephanie Bogan: If I get a little one of those hey it's James from julie's office just want to let you know no big news or updates this week everything's on track here if you get any paperwork, you have questions about just please give us a holler will be happy to help you with it.

639

01:25:05.010 --> 01:25:14.820

Stephanie Bogan: Unless I hear from great unless something comes up before then i'll be in touch next Friday if I get that phone call or that video or that email every Friday now imagine that someone's face imagine that it is julie's assistant.

640

01:25:15.450 --> 01:25:25.830

Stephanie Bogan: Am I going to feel connected and close to her, am I going to feel more comfortable reaching out to her instead of July to get my stuff done, I am because she's shown up in my inbox and said i'm here and i'm helpful and I.

641

01:25:30.450 --> 01:25:32.670

Adam Cmejla: Hope you go mute or did I lose.

642

01:25:36.210 --> 01:25:36.990

Allison Foulk: She went me oh.

643

01:25:41.760 --> 01:25:42.540

Adam Cmejla: she's on a roll.



644

01:25:44.760 --> 01:25:48.210

Adam Cmejla: know you somehow we lost your audio for about 20 seconds.

645

01:25:48.450 --> 01:25:51.060

Stephanie Bogan: Ah, it was the best if you're going to get all day I can't even repeat i'm.

646

01:25:51.060 --> 01:25:52.140

Adam Cmejla: Sure, it probably was.

647

01:25:52.350 --> 01:25:56.130

Stephanie Bogan: Alright, so that and then so we just talked about you really want to use that.

648

01:25:56.130 --> 01:26:01.890

Stephanie Bogan: opportunity to to really set those expectations it's really powerful to communicate on a regular basis.

649

01:26:02.280 --> 01:26:10.200

Stephanie Bogan: monthly is very effective as well, but it doesn't understand rate three or four weeks goes by, things have been happening so i'm.

650

01:26:10.530 --> 01:26:23.070

Stephanie Bogan: i'm really have moved to being a big fan of some kind of weekly communication I call it, we call it follow up Fridays because that just really keeps them really engaged for that first 90 days, and then we can ease off the gas, since we need to.

651

01:26:24.510 --> 01:26:32.040

Stephanie Bogan: Again what's most important here is not that you implement 100% of the best practices and the variations that we're showing you.

652

01:26:32.340 --> 01:26:45.060

Stephanie Bogan: it's that you get clear on what your mvp or minimum viable product or based standard is what's the bar that you can set and stick to and meet with an answer that I can count on you, you can always expand it after that.



653

01:26:46.080 --> 01:26:53.970

Stephanie Bogan: But if you have don't say that you're going to follow up every Friday and not full up every Friday, because that is the anti trust equity.

654

01:26:54.540 --> 01:27:01.740

Stephanie Bogan: That basically says, you cannot count on me to do what I say i'm going to do so it's better to under promise and over deliver here.

655

01:27:02.370 --> 01:27:12.930

Stephanie Bogan: So, as you go out and you think about mapping this just imagine that you're the client remember, I believe that you can say anything if you show up with authenticity and integrity.

656

01:27:13.380 --> 01:27:22.680

Stephanie Bogan: And you frame it in a way that they can hear it's totally Okay, I have sat across really humans and said murphy's law says that, as soon as we transfer this money, the markets are going to go down.

657

01:27:23.040 --> 01:27:25.620

Stephanie Bogan: I really hope to do six and happen, but I want to warn you.

658

01:27:26.070 --> 01:27:32.820

Stephanie Bogan: Because if it does you're going to really want to call, and this is going to go back to that conversation we have, but if it does we'll be right here and right we're going to pick up the phone and.

659

01:27:33.510 --> 01:27:41.970

Stephanie Bogan: And you know, sometimes that actually happens in most of the time it doesn't, but it does sometimes it's just a little bit of seating that says, I don't control the markets.

660

01:27:42.690 --> 01:27:47.970

Stephanie Bogan: it's not my job to control the markets, it is my job to do this other thing which is to be here for you.

661

01:27:48.450 --> 01:27:56.550



Stephanie Bogan: Right we're going to watch your transfers daily we're going to give you an update every week it might take a couple of weeks for firms to let go your money sometimes they really have a hard time with that.

662

01:27:57.300 --> 01:28:00.990

Stephanie Bogan: Right setting an expectation that this is not going to happen in 24 hours.

663

01:28:01.290 --> 01:28:09.030

Stephanie Bogan: Moving your life savings can be really scary please we're going to reach out to you every Friday or every month we're going to have a check in with you, but please do not hesitate to call.

664

01:28:09.360 --> 01:28:22.500

Stephanie Bogan: If you have any questions or concerns in the process, the most important thing to us is the have clarity and confidence about how we're working with you to create the financial future that's important to you if you ever have any questions about that I want to be your first phone call.

665

01:28:23.880 --> 01:28:31.920

Stephanie Bogan: Right you're just you can say anything you just have to integrate it into the message and the conversation right you're not just going to show up and say thanks for being a client.

666

01:28:32.460 --> 01:28:40.260

Stephanie Bogan: here's all this stuff you're going to put in those engagement standards you're going to explain the process to them going back to those visuals for the.

667

01:28:40.650 --> 01:28:51.900

Stephanie Bogan: stories that you tell and then you're going to ultimately integrate them into your client service model, and these are just three visual variations so here's some of the background you guys have seen these in some of the sample libraries.

668

01:28:52.350 --> 01:29:00.750

Stephanie Bogan: here's a visual version of that annual service calendar, you can make a version of this pretty and give it to clients and then here is a pretty version.

669

01:29:01.590 --> 01:29:12.090



Stephanie Bogan: This part of a client deliverable for one of our leaders clients So you see the Nice timeline here that has the different things that are happening and then they're checking off as they go through that onboarding process.

670

01:29:12.660 --> 01:29:21.060

Stephanie Bogan: The things that they're doing related to specific goals they're using this and an ongoing basis in the service model to capture the things they're doing on an ongoing basis as well.

671

01:29:21.840 --> 01:29:30.090

Stephanie Bogan: But this is, these are good examples of how you can define the internal services that's example in the right corner turn that into a service calendar.

672

01:29:30.480 --> 01:29:40.410

Stephanie Bogan: But you can then turn into a client facing deliverable that says here's all that stuff in a way that you can see and hear and appreciate and a story that makes sense to you.

673

01:29:41.220 --> 01:29:46.650

Stephanie Bogan: So that's The goal is to take them through that process in a way that they really get.

674

01:29:47.430 --> 01:29:54.210

Stephanie Bogan: That all of the things that you convey to them who you are what you do your approach your ability to help them achieve their goals.

675

01:29:54.570 --> 01:30:04.800

Stephanie Bogan: is real and they can count on you to do that and we're creating a structure the track that they can run on we're creating the modules are the steps that we need to get them through.

676

01:30:05.430 --> 01:30:15.150

Stephanie Bogan: And third, most important, and not least is we're communicating that process, what does the engagement model look like here's how we're going to engage with you.

677

01:30:15.450 --> 01:30:23.760

Stephanie Bogan: here's what you can expect here's how we're going to communicate to you here's what we expect from you here's about how long this process is going to take.



678

01:30:24.180 --> 01:30:29.130

Stephanie Bogan: here's what the experience is going to be like and here's the track that we're going to put you on.

679

01:30:29.940 --> 01:30:39.390

Stephanie Bogan: So does that help you all get a really good sense of what that funnel looks like from how do I go from prospect process to building a bridge to that service model.

680

01:30:40.380 --> 01:30:50.790

Stephanie Bogan: There are four areas you're going to look at people very much like felicity said you're going to educate your staff on onboarding the goals and objectives watching this lesson is a really good way to do that.

681

01:30:51.450 --> 01:31:00.840

Stephanie Bogan: you're going to identify an onboarding manager Andrew and your firm, that is, you and that's Okay, but we need to understand that onboarding is a project and a process that needs to be looked at.

682

01:31:01.470 --> 01:31:10.350

Stephanie Bogan: Your weekly client meetings spreadsheet even though you're meeting with yourself right or your CRM needs to have a list of those clients in onboarding what phase they're in.

683

01:31:10.680 --> 01:31:18.360

Stephanie Bogan: so that you can track them those follow ups are what govern that on an ongoing basis right so who's going to own the onboarding process.

684

01:31:19.080 --> 01:31:28.200

Stephanie Bogan: And then engage with your teams or your assistance, even if it's five hours of virtual like what is it we're going to do to set up the systems and the structure and the steps to make this work.

685

01:31:29.190 --> 01:31:38.340

Stephanie Bogan: Adam can talk to you all day and twice on Sunday about putting the processes in place we showed you right the internal visuals the external client facing pieces.

686



01:31:38.640 --> 01:31:44.040

Stephanie Bogan: But also it's those workflows that go into those tech platforms that are going to automate those steps for you.

687

01:31:44.460 --> 01:31:54.930

Stephanie Bogan: So, as always, it's limitless you are welcome to rip off and deploy those client onboarding resources and then you're going to refine them to reflect your clients your process and the steps that you want to take them through.

688

01:31:56.430 --> 01:32:14.430

Stephanie Bogan: It's Adam talked about what we talked about the tech tools call and Lee tech expanders so we've listed a number, what are the tech platforms and resources your CRM that you can use to standardize that onboarding experience email campaigns, is one of the most under looked places.

689

01:32:14.580 --> 01:32:23.460

Stephanie Bogan: Yes, right, you can absolutely build an email campaign that says welcome you can send an email campaign that says, this is what the process is going to look like here's a short video from us.

690

01:32:23.820 --> 01:32:35.760

Stephanie Bogan: Here the right here's a visual of everything that you're going to need so when you think about you can't control the exact timing of when that paperwork is going to go through, but looking at those steps you can build a storyboard of messaging.

691

01:32:36.300 --> 01:32:42.570

Stephanie Bogan: hey it's time for a 30 day review right, you can record that video you can build a template a.

692

01:32:43.410 --> 01:32:55.650

Stephanie Bogan: Firm level video that really walks them through that process, so what you want to do is organize the factory work, think about surges think about systems, what are the things that are just structural and functional.

693

01:32:56.130 --> 01:33:01.470

Stephanie Bogan: That you can put on a system and repeat right build that workflow automate that email.



694

01:33:01.770 --> 01:33:11.970

Stephanie Bogan: So that you're freed up you and your staff to deliver that specialized experience so that you can make that phone call and make sure that you're answering those questions and moving them through the process.

695

01:33:12.600 --> 01:33:19.230

Adam Cmejla: And as you're thinking about what stephanie saying here all it is you're asking yourself extra as you're asking yourself these questions.

696

01:33:19.740 --> 01:33:31.650

Adam Cmejla: it's one thing to be on this call, and to hear us share and everybody in the Community share what's working for them some accountability, etc, but through that filter of accountability as you're thinking about where you're going to begin next.

697

01:33:31.920 --> 01:33:39.810

Adam Cmejla: Just please i'm sure you make sure that you carve out time on your calendar, what is the next best step in this process, what are you going to work on next.

698

01:33:40.080 --> 01:33:46.710

Adam Cmejla: And when are you going to carve that out on a calendar because it's so easy to do to participate in a call like this.

699

01:33:47.100 --> 01:33:50.760

Adam Cmejla: and say, yes, these are things i'm going to do and I write them down, and then they get.

700

01:33:51.120 --> 01:33:58.350

Adam Cmejla: tucked underneath the desk right all of this, everything that we're talking about here the common denominator, the dominator all of it is.

701

01:33:58.740 --> 01:34:07.470

Adam Cmejla: Time management and project management so what's that roadmap and then who's going to do what by when manage that project for Andrew it might be yes in himself, but.

702

01:34:07.740 --> 01:34:15.330



Adam Cmejla: As we were talking, I saw in chat there a little bit, this is a very easy project to delegate to a tea or to delegate to someone in a contract basis.

703

01:34:15.690 --> 01:34:25.920

Adam Cmejla: here's what i'm solving for here's what I have here's what success looks like and and develop that to someone else so block this out of when you're going to do that, I just want to emphasize that.

704

01:34:26.760 --> 01:34:31.650

Stephanie Bogan: And Jeff you made a really good point about perfect not being right.

705

01:34:31.680 --> 01:34:37.410

Stephanie Bogan: What keeps you from making progress, I just do you want it, can you share that can you.

706

01:34:38.370 --> 01:34:50.610

Jeffrey Dunn-Bernstein: yeah I mean, I think I think I will I assume that a lot of us are perfectionist here, and I think you 70 that was one of the biggest takeaway I really watched our one on one like four times right because you talk fast, like me, but.

707

01:34:51.420 --> 01:35:01.980

Jeffrey Dunn-Bernstein: There was good stuff, but I think one of the biggest things was, I have a big fear of putting something out there if it's not perfect and I tinker and I tinker and you know go over the spreadsheets and dial in math and.

708

01:35:02.460 --> 01:35:10.380

Jeffrey Dunn-Bernstein: I think a lot of us are probably like that, and one of the biggest takeaways that helped me not get over that fear, but offset it with a better game was.

709

01:35:11.280 --> 01:35:16.890

Jeffrey Dunn-Bernstein: put out the product, the mvp the minimum viable product and then use that.

710

01:35:17.340 --> 01:35:29.220

Jeffrey Dunn-Bernstein: use those updates use those upgrades just like our software does right when we get it it's annoying to have to reboot or or update something, but when it says, but you're getting all of



this, every time is a touch.

711

01:35:29.670 --> 01:35:42.570

Jeffrey Dunn-Bernstein: Like that's The one thing that I think allowed my brain to offset the perfect the beginning to like here's the reason here's something better that we can do that, that allows for this to be okay with me that make sense.

712

01:35:43.080 --> 01:35:50.010

Stephanie Bogan: Does to me, what about for the rest of you, because I think that's probably helpful for a lot of you, I know well.

713

01:35:51.060 --> 01:36:01.830

Adam Cmejla: slide Oh, this is, this is it sorry it's stepping in slidell Eric had the question any suggestions or ideas on how to go back to clients who may have been on boarded without a clear and laid out onboarding system, I mean.

714

01:36:02.280 --> 01:36:07.740

Adam Cmejla: This is the same question just phrase a little bit differently What better way to go back to your client than to say.

715

01:36:08.190 --> 01:36:20.010

Adam Cmejla: In as I continue to look for ways to reinvent evolve and grow, the way in which we delivered a great client experience I realized that.dot.or I want to let you know that.

716

01:36:21.090 --> 01:36:22.110

Adam Cmejla: we're introducing so.

717

01:36:22.110 --> 01:36:28.740

Stephanie Bogan: yeah we know what's happening along the way, and we realized, we can do a better job of letting you know it's happening so here's what you can expect from us going.

718

01:36:29.310 --> 01:36:38.310

Stephanie Bogan: yeah um, but I think very much to geoff's point in this idea of perfect when you think about this because you're all working on different things right now.



719

01:36:38.760 --> 01:36:48.450

Stephanie Bogan: Your brain is do I check that big project that i'm working on and I run over like that creates that conflict of where do I focus attention and priorities, welcome to life as an entrepreneur and business owner.

720

01:36:48.870 --> 01:36:52.020

Stephanie Bogan: Our job is to sit in this space and ask ourselves.

721

01:36:52.530 --> 01:37:03.300

Stephanie Bogan: Is this something I need to move on in a material way right now Andrew you might be like i'm doing stuff that works pretty good, this is not a huge issue there's some improvement i'd like to make.

722

01:37:03.900 --> 01:37:15.540

Stephanie Bogan: i'll put this on the list, no big deal Is this something that you need to prioritize right now felicity we might look at your priority set and say right, the best way not to make money is not lose it.

723

01:37:15.930 --> 01:37:20.280

Stephanie Bogan: We really want to stop and fix the leaks here and get that pipeline working.

724

01:37:20.580 --> 01:37:30.030

Stephanie Bogan: Or you might be Andrew in a place of what i'll call mvp and that mvp is there are some things that I can take away from this call that I can implement pretty easily and quickly.

725

01:37:30.630 --> 01:37:40.350

Stephanie Bogan: I can sit down with the team map out 90 days draw a picture right for emails and say we're going to just start calling people on Friday we don't have the emails we don't have the CRM like.

726

01:37:40.620 --> 01:37:52.440

Stephanie Bogan: we're just going to open it up and call every Friday like you can do that if you can do that at a base level or whatever your basis just start there just say hey over the next 30 days.

727

01:37:53.010 --> 01:38:00.570



Stephanie Bogan: Or the next week, if it's a priority, and you have the time I just want to knock this little bit out get a base level in place.

728

01:38:01.140 --> 01:38:07.080

Stephanie Bogan: So that it's good enough for now, while I work on things that are more material and then I can come back.

729

01:38:07.560 --> 01:38:20.280

Stephanie Bogan: and move this to mastery over time chunk by chunk piece by piece depending on where you are right, so I like to start with the map and the internal OPS, and the team and then ultimately, of course, work to the CRM and the workflows.

730

01:38:22.350 --> 01:38:25.500

Stephanie Bogan: Right, so does it have to be perfect, to be good, ladies and gentlemen.

731

01:38:29.610 --> 01:38:32.250

Stephanie Bogan: This is where you all unmute and do a resign.

732

01:38:35.490 --> 01:38:36.330

Stephanie Bogan: Though we meet hang on.

733

01:38:37.740 --> 01:38:47.850

Stephanie Bogan: what's really important with onboarding is that you look at it through the lens of have I done the real work have I answered the question can I count on you.

734

01:38:48.630 --> 01:38:57.780

Stephanie Bogan: And that means I have to be able to answer the question of right what's the planning what's the work process what's the relationship process.

735

01:38:58.080 --> 01:39:04.020

Stephanie Bogan: what's that engagement process, how can I define that so that you, as the client understand the expectation and that me.

736

01:39:04.320 --> 01:39:11.850



Stephanie Bogan: And or me and my team know what expectation, we need to manage and deliver to so that I can take the steps that I need to take.

737

01:39:12.330 --> 01:39:19.650

Stephanie Bogan: To do that work and create a steady sustainable system that we can reliably put clients through.

738

01:39:20.130 --> 01:39:27.570

Stephanie Bogan: Very much to address point you're always going to need to manage capacity, if you have a five client pipeline and you put 10 clients in it.

739

01:39:27.900 --> 01:39:36.540

Stephanie Bogan: it's going to break the system for felicity and anyone else in this situation, our job as we grow is to learn how to break things on purpose.

740

01:39:36.960 --> 01:39:42.480

Stephanie Bogan: To say we have a breakdown here, we need to recognize that we need to give it its attention.

741

01:39:42.810 --> 01:39:51.300

Stephanie Bogan: And we need to figure out what we need to account for because this is too impactful for the business it's too big, of an opportunity for us to not capitalize on.

742

01:39:52.140 --> 01:40:01.890

Stephanie Bogan: So wherever you are in that spectrum, this is an opportunity, and I hope that Adam and I and the conversation that we've had with you, and each other has helped you to learn how to optimize your onboarding process.

743

01:40:02.310 --> 01:40:08.820

Stephanie Bogan: in ways that are easier, effective and more enjoyable for you and for the client, because that is pretty much what we're all about here at limitless.

744

01:40:10.320 --> 01:40:17.790

Stephanie Bogan: Right does this help you guys today, I saw a lot of really positive feedback in the chat Alison has already posted I think the resources we.



745

01:40:17.790 --> 01:40:23.820

Stephanie Bogan: Will process the video you can play it on like half speed, which is what you have to do with Adam and I.

746

01:40:24.150 --> 01:40:29.040

Stephanie Bogan: We have three hours of conversation anywhere 90 minute call and you're getting more than you pay.

747

01:40:29.790 --> 01:40:40.170

Adam Cmejla: One of the kids his office hour is either an offer now is that it was one of his summits that I did there was someone that actually put in the chat what happened to my audio Why is Adam on one and a quarter speed and like.

748

01:40:40.560 --> 01:40:48.000

Adam Cmejla: Oh there's my sign that is my science I ever since that I have tried to take mental note to just bring it down a notch.

749

01:40:49.590 --> 01:41:03.180

Stephanie Bogan: All right, ladies and gentlemen, I hope that you have found your mojo today that you are ready to attack this Monday and the rest of the week, with all of the awesomeness that is you with that go forth and remember to live a no limits life have.

750

01:41:03.450 --> 01:41:06.210

Adam Cmejla: To go watch some airplanes have fun everybody enjoy your day.

