

LIMITLESS Coaching Call Transcript

SEPTEMBER 26TH, 2022
LIFESTYLE COACHING CALL

101

00:14:25.680 --> 00:14:29.090

Stephanie Bogan: All right, you guys ready to talk office hours and questions.

102

00:14:30.020 --> 00:14:47.649

Stephanie Bogan: Thank you. Um, that's not easy to do. By the way, it makes me feel very emotional, because I feel like you guys deserve so much better for me, and I let someone in a situation really steal my energy in a way that is not above the line, and it's because it's really triggering things in me

103

00:14:47.720 --> 00:15:02.019

Stephanie Bogan: on vulnerability and abuse and mean people, and that's just work I have to do. And my coach died last year, and I've been really busy with my kids in my life, and it just reminded me that I have to be accountable in the same way.

104

00:15:02.030 --> 00:15:21.079

Stephanie Bogan: It's got to work, and it's got to feel good, and after that conversation I didn't feel good, and my team didn't feel good, and that's what I owe all of you, and that's what I owe my team, so I will leave it with that. But um! I care enough about you guys to want to spend an example that I think is honorable or worthy, and that wasn't it. And i'm sorry

105

00:15:22.210 --> 00:15:33.690

Stephanie Bogan: all right, and i'm going to let it go, because that's what you got to do with ladies and gentlemen, if we have not, they'll have enough tracks equity to be imperfect and shit. I don't know what else I can do.

106

00:15:33.700 --> 00:15:39.129

Stephanie Bogan: All right. Let us talk about all the awesomeness. Thank you guys so much.

107

00:15:39.370 --> 00:15:58.970

Stephanie Bogan: It's not necessary, but it's honest, and I just I can't be the kind of person I can't carry



negative energy around with me, and I tried for a couple of months, and that's what happened. So I just wanted to be honest with you guys about that, because That's the work that we're all doing together. You guys think i'm perfect in my life, and my life is amazing, Really, there's so much good stuff.

108

00:15:59.100 --> 00:16:05.399

Stephanie Bogan: But I still have kids and spouses and people and all the stuff in life, and we're all always going to have that

109

00:16:05.750 --> 00:16:07.260

Stephanie Bogan: always.

110

00:16:07.300 --> 00:16:26.740

Stephanie Bogan: And it's How do we sit in that space and really challenge ourselves to be as clear and as conscious as we possibly can. And that's what I love about this community. That's what we're about. So thank you guys very much for your Grace. Um, and I know you're not holding it against me. But that was really on my hurt, and I just needed to share it. So thank you.

111

00:16:27.490 --> 00:16:37.470

Stephanie Bogan: All right. Let's talk about where you guys are going from here, right up, and what is next onward and upward, as we like to say. So Theresa got some real clarity

112

00:16:37.480 --> 00:16:50.890

Stephanie Bogan: around what some conversations we might want to have. We have some just action items. We will have information on our partners again. If you want to connect, please feel free to reach out. We're going to have information. Our partners and the inbox. You guys, these are amazing people.

113

00:16:50.900 --> 00:17:17.310

Stephanie Bogan: I mean this. These people would not be here if they're not amazing. We do not invite anybody for the sake of being here. The canvas is the the Megas, the cess tailors, the stuff promos. They're here because they're quality people, which is why I feel bad about not necessarily honoring all of their experiences as well. Um, we want to create all these opportunities for you to connect and engage, so you'll have information on that. Your survey and your inbox. The Book Club is coming up. We're talking about

114

00:17:17.319 --> 00:17:29.760

Stephanie Bogan: Ah fascinate, which is great marketing. Read, and then upcoming coaching calls one of our alumni, Patrick King, who really worked for that first year, I mean like worked, went through three



different niches

115

00:17:29.770 --> 00:17:55.300

Stephanie Bogan: uh to ultimately come up with his niche and uh develop really successful Youtube marketing channel. So I know again, digital marketing is one of those areas that is really growing and evolving. And we want to bring in real life experiences. So Patrick's gonna come uh and share how he's been marketing through Youtube. You can go watch his videos on you, too, in advance of that, if you want to. You're going to find that they're not wildly expensive productions. They're Patrick's Day

116

00:17:55.310 --> 00:18:12.700

Stephanie Bogan: recording a video. And then Kathy Kurtov Curtis, who's one of our super-successful alumni is She makes all the invest a pedial list right? She's really big in the women's space has done an incredible job of building a brand on social media and generating an audience and clients through that. So she's going to talk with us later that day as well.

117

00:18:12.710 --> 00:18:20.279

Stephanie Bogan: All right. Questions for today, Slido com hashtag limitless. We'll dive into those i'm going to open that up here with you.

118

00:18:20.740 --> 00:18:25.799

Stephanie Bogan: With that I would love for everybody to drop into the chat.

119

00:18:26.110 --> 00:18:29.999

Stephanie Bogan: Your biggest question post retreat.

120

00:18:32.020 --> 00:18:33.590

Stephanie Bogan: I can't promise we're going to get to

121

00:18:33.600 --> 00:18:36.959

Stephanie Bogan: of them today, but we're going to get to as many of them as we can.

122

00:18:38.450 --> 00:18:42.590

Stephanie Bogan: I guess I should at least as Alison's like. Put it in a slide out. It's probably

123



00:18:42.600 --> 00:18:43.819

Stephanie Bogan: I didn't say it.

124

00:18:46.810 --> 00:18:59.869

Stephanie Bogan: Allison is amazing. By the way, Michelle, So I you guys to know that we went to the honky talk on Wednesday note to self. I go to bed at like ten o'clock, and the Hunky Docs don't start to lady. But on Friday night

125

00:18:59.880 --> 00:19:18.409

Stephanie Bogan: we a bunch of this went out, and then, like we went to the Kid Rock Place, and, by the way, they only played rock music there. And one of the reasons also went away. But that is not what I went to Nashville for, so like at ten thirty we were like this isn't working. So half the group went back to the hotel, and I was like, I'm not making this downtown until I get these country music.

126

00:19:18.420 --> 00:19:37.979

Stephanie Bogan: Yeah, We found this little place called Myne's. I would have to bounce from the first of real country music in this town. And then there's like one thirty in the morning dancing. I levels that I was so much fun. So note to self. Uh: alright, yeah, we'll tell you about the schedule for next year, but the time all right. I'm giving you guys an opportunity to drop some stuff into a slide up.

127

00:19:37.990 --> 00:19:39.310

Stephanie Bogan: Michael Hansen.

128

00:19:39.960 --> 00:19:41.140

Stephanie Bogan: How you doing?

129

00:19:43.810 --> 00:19:46.090

Stephanie Sammons: Oh, i'm doing great.

130

00:19:46.100 --> 00:19:48.539

Stephanie Bogan: What's your biggest question, Poster tree?

131

00:19:50.150 --> 00:19:52.420

Michael Hansen: Um



132

00:20:01.040 --> 00:20:14.309

Michael Hansen: no! My biggest question is, I don't know if it's a really big question, because I think we've got to actually a lot of clarity. Pam and I have the retreat. So I think it's really more down to the degree about how to actually one hundred and fifty.

133

00:20:14.450 --> 00:20:20.909

Michael Hansen: Take our vision and make it happen. So that's probably the biggest question.

134

00:20:21.110 --> 00:20:23.359

Stephanie Bogan: So what's that next best step?

135

00:20:25.090 --> 00:20:34.019

Michael Hansen: The next next step is basically just aligning our marketing. So there's consistency across all platforms.

136

00:20:34.060 --> 00:20:41.310

Stephanie Bogan: Okay, So, Pam, from your point of view. What's your biggest question? And or do you have clarity on your next best step?

137

00:20:41.820 --> 00:20:50.529

Pamela Jacobs: I think we got a lot of clarity and um working together on what our message is unifying it, because we have two different niches. And so we want to make sure that

138

00:20:50.610 --> 00:21:08.099

Pamela Jacobs: the value statement is there at the front forward, because we're doing marketing. But nothing was happening to come to the website and then go didn't work, So we are getting that we've got a marketing team branding team. I'm a little pr gal out of Ukraine. He's working her little tail off for us.

139

00:21:08.110 --> 00:21:13.329

Pamela Jacobs: And so we're getting that also sync together, and it's really making it

140

00:21:13.390 --> 00:21:30.289

Pamela Jacobs: making it actually move forward. So we're We're very excited about that, and then the



takeaways. You know. How am I going to do? Michael's done videos, and I have to step up and get my voice in my face on the website as well into video. So i'm committed to doing those

141

00:21:30.300 --> 00:21:43.599

Pamela Jacobs: I mean. It was. It was good, I mean, the clarity was great for those you don't know we have a joined business in two different styles, two different styles of people, two different niches. So getting that to go together

142

00:21:43.610 --> 00:21:51.689

Pamela Jacobs: has been a challenge. But we're much further than we've ever been, and i'm hoping that by the end of this year that door will be closed, and we'll just be rock and rolling.

143

00:21:52.400 --> 00:22:02.690

Stephanie Bogan: Well, the fun thing about branding. We talked about this for a couple of days at leaders. How many of you have ever cut a tomato? If you were in the branding session. We talked about this, but how many of you have ever cut a tomato with a dole knife?

144

00:22:03.600 --> 00:22:04.880

Stephanie Bogan: How's it go?

145

00:22:05.800 --> 00:22:13.039

Stephanie Bogan: It's messy and inefficient. And right. And then what happens when you get like a really sharp knife, and you cut that tomato?

146

00:22:13.680 --> 00:22:33.489

Stephanie Bogan: It's like effort like That's the difference between inspired action and effort and action. And what you're here, hey? I'm saying for any of you that don't have a really defined nature. You're managing multiple niches on your website. Your job is to find the sharpest message that you can that appeals to both your audiences. Remember seventh grade science.

147

00:22:33.500 --> 00:22:40.760

Stephanie Bogan: What was it uh my science teacher was so good. At this kinky people often find good sex somewhere.

148

00:22:41.410 --> 00:22:55.190



Stephanie Bogan: I'm forty, nine years old, and I remember that kingdom by long-ranking species subspecies like man, that is marketing right there like forty nine. I still remember that stuff. I was not my science teacher.

149

00:22:55.200 --> 00:23:10.750

Stephanie Bogan: Yeah, my side was awesome. I also remember when, like she was literally there when the space shuttle blew up, and that was intense. But she was amazing. Like she genuinely love her work and look like I literally at forty-nine years old. I remember that as a result

150

00:23:10.910 --> 00:23:25.359

Stephanie Bogan: that that's the magic of really being in the flow of what you do The goal with the website is to be so strikingly clear about who you are, who you serve, and the change that you can affect in their life,

151

00:23:25.480 --> 00:23:55.070

Stephanie Bogan: that they can pretty quickly. Two to seven seconds ago I'm curious where I'm not not I'm going to hire Paul right now. I'm. I'm going to hire you. I'm not. Am I curious? Your challenge is to create enough curiosity that I want to take that next step. The next step on most websites for the research is my team unless you have a strong call to action, a download, et cetera, in which case it should absolutely be the call to action, because well, the team is lovely. You actually want people to get information

152

00:23:55.080 --> 00:24:14.439

Stephanie Bogan: that gets them off the chair. So it's really about finding a brand message going back to kingdom. Phyllo, if you are one hundred percent niched, it's really easy to get all the way down to kings and set somewhere right things in being game. If you have multiple niches, two or three or four, you have to go kingdom. Finally,

153

00:24:14.450 --> 00:24:32.170

Stephanie Bogan: what are the the messages that are core? And then on that front page of the website as quickly as possible, shift those people into the next step, which for them will be something targeted to their natural specialty Page testimonials or something, so that you can get them to the I you

154

00:24:32.180 --> 00:24:43.959

Stephanie Bogan: as quickly as possible. And in that case, then you want to get them to ideally a customized download Right, Pam Women business owners. You don't want to have the same generic download if you don't have to.



155

00:24:44.190 --> 00:24:59.290

Stephanie Bogan: So if you're interested in websites. Right? Post your stuff on tribe. We've got some great web partners with a range of budgets depending on where you are, but it is a digital world. Ladies and gentlemen, the most important thing that you can do

156

00:24:59.410 --> 00:25:09.810

Stephanie Bogan: is get clear, concise, and compelling in the message that you curate for your audience. It starts with your website. I haven't done a brochure in fifteen years,

157

00:25:09.820 --> 00:25:10.990

literally retired,

158

00:25:11.000 --> 00:25:29.629

Stephanie Bogan: but I came back. Nobody printed anything or why everybody's going to your website. That is your brochure, it your proof of concept. It's your curiosity hook, and our job is to really make sure that we know who it's talking to. What we want to communicate to them in terms of the change that we're going to affect.

159

00:25:29.640 --> 00:25:38.230

Stephanie Bogan: So thank kingdom, Filey species subspecies order and hanging me on my in good spring genius. So it's like It's pretty good.

160

00:25:38.240 --> 00:25:51.609

Stephanie Bogan: That's the goal is how narrow can you get? And you can do incredibly effective marketing. By the way three layers down with multiple audiences. I love niches. The more specialist you are, the faster we can brew you. Yes, yes, yes, yes;

161

00:25:51.620 --> 00:26:06.499

Stephanie Bogan: but if You're not quite there. I'm not going to sit here and lightly and tell you that you can't be right. You can't make progress. You can't be successful. It's how much kniving you want to do when you're dang tomato. That's what it really boils down to. And if we're honest, it has a lot to do with your economics

162

00:26:06.510 --> 00:26:19.920

Stephanie Bogan: if you can take that right. Band-aid. Risk right, or you know, rip off the Band-aid or do it. Slowly. It has to do with your experience. Is your mindset telling you? Oh, my God, it's gonna be the



worst thing you've ever done.

163

00:26:19.930 --> 00:26:34.749

Stephanie Bogan: And then how are you engaging? Are you prioritized. You have the right partners. Can you write like, How are you actually working? I think very much to my compam situation like, How are you going to sit down and say, How are we going to write six, or go up on this project and make sure that it gets done

164

00:26:35.370 --> 00:26:49.109

Stephanie Bogan: so? Websites are just so incredibly powerful. Your Ceos. Look at them, your clients look at them when they make referrals, their friends. Look at them like if your website does not reflect. Are you guys ready for this? The future that you came here to create? It needs some work

165

00:26:49.150 --> 00:27:01.170

Stephanie Bogan: that does not mean you have to make that priority one at this moment, because it may not be the thing that's most hurting you. That's the evaluation part. But if I cannot go to your website and see who you are,

166

00:27:01.250 --> 00:27:08.500

Stephanie Bogan: right, who you serve, and the change that you're going to impact in five seconds. Then you need to do some work on your website,

167

00:27:08.530 --> 00:27:38.159

Stephanie Bogan: and we walked to the on the website lesson, Taylor. We actually had Taylor, who no joke four years ago. I did not have a great website, and was listening in this lesson, and is now coming back teaching it because he's like a brilliant marketing Rock Star. So we had a whole separate section, where he just took some of your websites. Uh I couldn't be in that session at the same time it would have been super fun. But we let Taylor do it because he's awesome. And he just went through and broke some of your websites down great session to watch, because it's the same information or five basic calls to action

168

00:27:38.200 --> 00:27:41.460

Stephanie Bogan: that you want on every good website you want a Kick-ass headline,

169

00:27:41.480 --> 00:27:44.779

Stephanie Bogan: see? I said, that with positive energy kick-ass headline,



170

00:27:44.900 --> 00:27:57.489

Stephanie Bogan: who's a four? Does it move me? Just get my attention if it doesn't it's not a kick-ass headline two Who's that for and two seconds on that homepage. I should know who your clients are. If not, you've just got a dollar knife.

171

00:27:57.600 --> 00:28:09.430

Stephanie Bogan: What's the value? Prop? It might be functional taxes, guard, rails, et cetera and for some clients right business owners retirees That might be Why, they think they're coming and you're going to bridge the gap about long-term planning.

172

00:28:09.440 --> 00:28:20.770

Stephanie Bogan: Some of you are going to lead with y stuff. Taylor's got a very effective functional website. He's updating it to incorporate more of the why, the outcome, the promise that we talk so much about

173

00:28:20.780 --> 00:28:34.540

Stephanie Bogan: It's got to have a lead chance. So many of your websites do not have a call to action. Besides, call me call me for being honest Is not a Legion Legion is. Can I get your email in exchange for something that has value to me

174

00:28:34.550 --> 00:28:49.749

Stephanie Bogan: download? Taylor's got a free assessment on his website. Ben's got a you know, the top ten mistakes that retirees make you guys worry about like It's got to be the most awesome saw ever. It just has to be something that makes people download it in exchange for the email,

175

00:28:49.790 --> 00:28:58.260

Stephanie Bogan: so that you can then blog on a video on and love on them at all right. However, you're gonna do it to be like i'm so awesome. So let me tell you about it.

176

00:28:58.690 --> 00:29:03.319

Stephanie Bogan: So that call to action that legion is super important,

177

00:29:03.330 --> 00:29:12.190

Stephanie Bogan: and then ultimately proof of concept, usually on your second panel, it's your forbes, your client testimonials your invest to be like. What



178

00:29:12.200 --> 00:29:18.800

Stephanie Bogan: little bit of data can you put out there that tells people in their brains? You're trustworthy, Incredible! And you're not going to sell their money.

179

00:29:19.250 --> 00:29:34.649

Stephanie Bogan: There's the five call to actions that are not complicated that you can all have on your website, even if it's moderately it right. Now you can go in very quickly and change your headline, Change the tagline under it. You can add a call to action,

180

00:29:34.660 --> 00:29:52.269

Stephanie Bogan: even without revamping the rest of your website, even if it's aunt like all that stuff we talk about. Do you know why? Because the research says that people never get to most of your website. So they get to the home page, the second panel and your call to action. If you're been your meet the team,

181

00:29:52.490 --> 00:30:07.669

Stephanie Bogan: and so we want to make sure that we're using those first seconds really effectively, to put them where we want, so that they can evaluate the information and decide. Is there some action I want to take. Am I in looking at a mode that's going to show up in your analytics?

182

00:30:07.680 --> 00:30:22.970

Stephanie Bogan: Why people have visited the site the time they spent on the site and the conversion right to your call to action or your phone calls, You're going to see the people that converted to your call to your Legion, and you're going to see people that converted to call to action. You're going to get really consistent numbers over time,

183

00:30:23.000 --> 00:30:26.589

Stephanie Bogan: and we talked about how they're changing kind of the underlying

184

00:30:26.660 --> 00:30:38.120

Stephanie Bogan: tech rules, so that all those cookies won't necessarily be there. So you want to gather on it that day. Well, I can. And ultimately all you're going to be able to see is who comes to the website. And then what did they do about it?

185

00:30:38.130 --> 00:30:58.049



Stephanie Bogan: And you're just gonna want to continue to sharpen that knife. Because if you we talked about this in the brand session, if we looked at your conversion data for all of you. I was talking about Lisa last week. She's like, Yeah, We have three hundred people a week. Visit the website, and, like, where are one thousand two hundred people a month coming from It's ridiculously consistent.

186

00:30:58.210 --> 00:31:09.049

Stephanie Bogan: Ok, what's the conversion to rate? Call to action to write program. That's the data that you want to see. Because, Jed, what happens if you just went, you guys ready for this.

187

00:31:09.410 --> 00:31:12.689

Stephanie Bogan: What if you just went from one percent conversion to two percent.

188

00:31:12.700 --> 00:31:13.980

Stephanie Bogan: What would that mean?

189

00:31:15.290 --> 00:31:26.489

Stephanie Bogan: Because what we don't know what you can't really effectively track outside of just that broad data is the number of people who visit, and the number of people that click on something that's usually like ninety percent of the people

190

00:31:26.720 --> 00:31:41.040

Stephanie Bogan: They're not all the right clients. Your legion, if It's General, is bringing the wrong people to the website, so you should, as you get more and more refined in your Legion marketing your Cli marketing, etc. You should see that that gap narrow

191

00:31:41.050 --> 00:31:58.870

Stephanie Bogan: because more and more of the right people are visiting your website, if that makes sense. But if Jed went from a one percent to a two percent conversion on fifty people that visited website, and he got two leads, and he went to four leads a week or a month. What would that mean to his revenue

192

00:31:59.640 --> 00:32:08.800

Stephanie Bogan: like? So we get all like Oh, I got to do all this strange stuff, and I like I thought. We just take the stuff we're doing, and we just spend a little bit of energy getting better at it.

193



00:32:08.920 --> 00:32:24.980

Stephanie Bogan: So that's why websites are not just pretty pictures and nice words they are stories that you're telling to the marketplace, and stories activate seven centers of the brain. They're the most compelling marketing tool that we have, and we're not leveraging the most of the time.

194

00:32:24.990 --> 00:32:36.560

Stephanie Bogan: So if you can really build that story to fit your client and your model practice, that's the work. Then you can start to look at that data, Pam and Mike, and on the rest of you And look at those analytics and see if it's working,

195

00:32:37.180 --> 00:32:50.340

Stephanie Bogan: and if it is, you just keep tightening right. You try different calls to actions and download. You do webinars or vlogs, and then then it becomes rate tweaking and refining to really make it fit your audience integrals.

196

00:32:50.870 --> 00:33:20.560

Stephanie Bogan: So, Pam Mike, I know you guys are going through that process that I wanted to take a little bit of time, because I know so many of the rest of you. I have website. Everyone here, I think, has one right, and then depending on the quality of that. That's the challenge. Is, Are you in a place? And then the next level of website? You have a lot of fun is to really build your legion, your sales funnel into the website, so that when someone says Yes, i'm interested, there's just a quiz right or a series of questions they go through, and they self-select

197

00:33:20.940 --> 00:33:34.349

Stephanie Bogan: again. You're going to do it. Nice languaging you're going to be super classy about it, and at the end they're going to know up or out like. Here's some resources. Here are some places we'd love to send you, or hey? We'd love to schedule a call click here,

198

00:33:34.680 --> 00:33:38.289

Stephanie Bogan: and so you can take ninety percent of that process and

199

00:33:38.300 --> 00:33:50.759

Stephanie Bogan: literally streamline it so that you're not actually talking to a person unless they have raised their hands that I've done the work, and I think I do actually want to talk to you, and that's how you get to the eighty percent close, right? Because when you put the sales process in place after that

200

00:33:50.770 --> 00:34:05.679



Stephanie Bogan: it is inevitable that they are going to move up or out very quickly because you've done so much of the Gen. You've now done it on the website ideally with a funnel. And again, that funnel can be personal. I sat in a practice and just had those phone calls a lot where there was no digital funnel. I had to do it.

201

00:34:05.940 --> 00:34:14.319

Stephanie Bogan: So if you've got people, it's still great. And then that fourth piece is right, all you know, going through the sales process and on boarding them, which we talk a lot about.

202

00:34:15.250 --> 00:34:30.609

Stephanie Bogan: All right. Let's see. Uh Danny and Slider, How do you protect your best clients? Economically speaking, from being disenfranchised as you focus just and do our niche, and it's the uh great question, Danny. Uh step one. You're not going to send them all a letter that says, we're not about.

203

00:34:31.130 --> 00:34:37.009

Stephanie Bogan: That's not really the goal. So for all of you, how often do your clients actually go to your websites?

204

00:34:39.320 --> 00:34:40.790

Stephanie Bogan: Not that often

205

00:34:40.800 --> 00:34:43.309

Stephanie Bogan: like genuinely. Not that often.

206

00:34:43.320 --> 00:35:01.140

Stephanie Bogan: Um Adam's gone through this China has gone through this right. Most of of limitless coaches have gone through this at some point which is one. You make the decision, too. You update the website for the future, not the past. And then you have a really honest conversation with your clients, because we don't need to hide it.

207

00:35:01.150 --> 00:35:16.130

Stephanie Bogan: It says, Hey, we have so enjoyed working with you over the years, and we continue to honor and appreciate that relationship. And in the last couple of years We've had a number of widows retirees, business owners, you know, tech execs with our S. U. S.

208



00:35:16.140 --> 00:35:42.750

Stephanie Bogan: Reach out to us, and as a result of that we've developed a really specific specialty, and we find that we really love working with these clients, and we can add a ton of value, and we really want to specialize our practice there. We're going to maintain our relationship. We value and appreciate that what's going to change for you. And as we go forward you're just going to see the marketing focus on that planning is planning. It's all good right. Haven't meeting. Write a letter. You've done it one hundred and Zillion times you might have not going to lie one or two clients who are like.

209

00:35:43.410 --> 00:35:52.799

Stephanie Bogan: Are you like? Are you going to fire me and you're like? So this is why you have to get really clear. What is that strategy? Because you don't want to say no, and then go back to them six months later.

210

00:35:53.160 --> 00:36:23.150

Stephanie Bogan: So again, it really depends on your economics. If you're at and Ramen and you can write, expedite yourself. That trans transition is a little bit easier, and you don't have to. I think Adam still has like twenty-seven clients that are general clients that his service adviser manages, and that became the income mentioned, by the way, that revenue was what That was a very specific decision for him. Instead of shedding those clients, he would bring in a service advisor to service them so they could get the consistency and the quality of the attention they

211

00:36:23.160 --> 00:36:30.870

Stephanie Bogan: deserved, and he would use that revenue to then fund that income and Jen to serve right to create leverage for him and the rest of the clients.

212

00:36:30.880 --> 00:36:46.579

Stephanie Bogan: If you don't want a service advisor, that's not a great strategy. You can find very effective ways to support and transition those clients in a way that leaves you and them feeling like You're acting from a place of integrity and character, and that's always what the breakdown is.

213

00:36:46.790 --> 00:37:05.559

Stephanie Bogan: I'm sorry that was from diocese. That um. So do you guys have questions about how many is anyone else can share. I know many of you have gone through the process of narrowing your niche a bit, having some of those conversations with clients. Is there anyone on the line that wants to share a little bit about their experience going through that?

214

00:37:07.730 --> 00:37:09.689

Andrew Hatherley: Well, i'm about to go through it,



215

00:37:09.700 --> 00:37:20.120

Andrew Hatherley: and I think what you say about clients. Don't. Go to your website is very true, so my my approach is going to be. Those clients who will see

216

00:37:20.370 --> 00:37:27.569

Andrew Hatherley: outreach to the niche who don't fit into the niche particularly on linkedin. I'll probably call those people

217

00:37:27.580 --> 00:37:47.309

Andrew Hatherley: um or have direct contact with those people, or as part of a check-in call, Say, hey? You'll likely see a few things on linkedin referencing. Ah, ah, gray! Divorces Ah just know that this is the future orientation of my practice. But one hundred percent of my commitment is still to my existing client.

218

00:37:47.570 --> 00:38:04.470

Stephanie Bogan: Yeah, people generally get marketing. And again, if one or two people are like, hey? Adams had one or two people since he made that transition come and say, Hey, this doesn't feel like a perfect fit anymore. But he's brought on twenty or thirty clients on the other side of that.

219

00:38:04.480 --> 00:38:22.120

Stephanie Bogan: That that's okay. So it's about how you put kind of a cocoon or a container strategy around the science and message it as you're creating more of that specialty in focus. And either that really works, or very slowly over time. Right it, they'll ease themselves, or you will ease them out.

220

00:38:22.130 --> 00:38:24.990

Stephanie Bogan: But it's not nearly as big an event as we as we tell

221

00:38:25.000 --> 00:38:34.260

Stephanie Bogan: it it isn't it isn't, and i'm convinced, because I've asked the question twice, and I've seen other people ask the question. It's probably one of the most asked questions

222

00:38:34.320 --> 00:38:50.279

Stephanie Bogan: It stems from a limiting belief it stems from an idea of scarcity, and it stems from the fear of not going all in. And I don't know. And I tell myself this because we've had this conversation that



you know

223

00:38:51.640 --> 00:39:06.720

Andrew Hatherley: enough. People have shown that it works. It works Just just go all in and and and do it. And you know you mentioned at the conference. What does growth mean? You? You said, what's growth mean to you? And

224

00:39:06.880 --> 00:39:16.290

Andrew Hatherley: I thought about that a lot, and I determined that what growth means to me is freedom from the regret of not having tried not having put that best effort forward.

225

00:39:16.300 --> 00:39:17.149

Yeah,

226

00:39:17.270 --> 00:39:47.059

Stephanie Bogan: yeah, we we have this idea of what we want to create with those voices in our head are genuinely pummeling and peppering us constantly with the can. I shouldn't? And I don't know how, and that's what we're in this community. To do is to really counter and challenge that with curiosity and consciousness, right and catalyst for growth. And Adam will tell you, you, you know, like we've done this hundreds and hundreds of times, and it doesn't mean, you know there's never one or two clients, but in general it is so much less

227

00:39:47.070 --> 00:39:58.690

Stephanie Bogan: of an event, then we make it out to be because we genuinely, in our heart of hearts, believe that our clients are going to hear us saying, We're too good for you now, and we've outgrown you.

228

00:39:58.700 --> 00:40:04.090

Stephanie Bogan: Nobody on this call wants to be that person like I right? You're not here.

229

00:40:04.100 --> 00:40:05.590

Stephanie Bogan: Yeah, because you that kind of person

230

00:40:05.600 --> 00:40:16.589

Stephanie Bogan: there's no perfect solution. And as you put forward at the conference, and Adam



mentioned several times. Growth is messy. You may have one or two people to do that, but it's part of the or the process,

231

00:40:16.600 --> 00:40:26.419

Stephanie Bogan: and that's the hard part. We really do try to organize it in a relationship, serve as heart-centered business, so that nobody is ever upset with us ever

232

00:40:26.610 --> 00:40:43.670

Stephanie Bogan: because we don't like that, and that is the hardest work of all is, Can we sit through the lens of a business case? Not a business case in the greedy gripper sense, a business case in the sense of a business always has by definition, multiple stakeholders

233

00:40:43.950 --> 00:41:02.030

Stephanie Bogan: and in service firms, particularly financial planning. Right, because those of you who are service-oriented are trying really hard bunch of as well as sales people. Our orientation is to over-service right under charge do too much for too little for too long because we're so afraid of being those other people.

234

00:41:02.040 --> 00:41:09.979

Stephanie Bogan: And the problem is, is, it really disrespects the other stakeholders who are valid in the process? Our team

235

00:41:10.230 --> 00:41:20.490

Stephanie Bogan: right the rest of our clients. How many times have we talked about when we want to go to our clients and say, Wow! I really feel in my heart of hearts like I could have done a better job. But I've been doing my best to keep up with everything.

236

00:41:20.500 --> 00:41:23.579

Stephanie Bogan: They'll be Ok. In the end like No, we wouldn't feel great about that.

237

00:41:24.090 --> 00:41:42.789

Stephanie Bogan: And so we really do want to sit in the space of how do we start to pull the levers in the business, even when they're uncomfortable. Andrew, to say, How can I genuinely be a best service to the group of people that I make that commitment to, because that feels really, really amazing when you do it.

238



00:41:42.800 --> 00:41:44.249

Stephanie Bogan: And you guys know that.

239

00:41:45.170 --> 00:41:51.359

Stephanie Bogan: So if you're going through a transition, the question to really ask yourself, is, am I going to rip off the band? A.

240

00:41:51.520 --> 00:41:57.689

Stephanie Bogan: You know? If, again, economics, experience and engagement allow for that mindset being a huge part of it

241

00:41:57.700 --> 00:42:01.120

Stephanie Bogan: two. Do I need a stage transition

242

00:42:01.130 --> 00:42:10.770

Stephanie Bogan: right? Oftentimes we will build transition strategies when the economics aren't right so awesome that we can just afford to right. Cut off a portion of the client base

243

00:42:10.780 --> 00:42:27.789

Stephanie Bogan: where we basically stay level for some period of time, hey? For every five thousand dollars of clients we bring on. We're going to do that transition conversation with rate five thousand a potential revenue, hey? This is the new model you can pay at a higher fee. We can refer you elsewhere right here. Some of our cost resources, if you want them,

244

00:42:28.220 --> 00:42:43.180

Stephanie Bogan: and that way you won't necessarily grow in terms of the current clients. But you'll maintain revenue and improve your margin and your time capacity every single time. Right because you're trading low margin work for higher margin work,

245

00:42:43.190 --> 00:42:52.640

Stephanie Bogan: and ultimately, when you replace those ten or twenty clients, you'll have more revenue and more margin, which then creates lift for you to go right, and then grow the firm beyond that.

246

00:42:52.970 --> 00:43:11.479



Stephanie Bogan: So it's really a function, as you guys manifest these changes. What's your road map? Which is why we get even really more excited about right being able to partner with you. A little bit more close to the next year is what are the levers that you really need to pull as you think about retreat. Growth. Retreat is all about the sexy, sizzling stuff. Everybody loves it

247

00:43:11.490 --> 00:43:18.640

Stephanie Bogan: but the underlying foundation isn't the sexy Sisley stuff it's. Who am I doing the sexy sizzle stuff? For

248

00:43:18.870 --> 00:43:31.239

Stephanie Bogan: how much work am I doing in exchange for the fee, services and capacity, and how much margin of, and I able to remove out of that right my efficiency and effectiveness as a business owner. That's the business case,

249

00:43:31.660 --> 00:43:38.029

Stephanie Bogan: and I think we are as loving and respectful and client-centric as you can humanly be.

250

00:43:38.040 --> 00:43:53.539

Stephanie Bogan: While recognizing that you're not nonprofits, and that's the thing. Let's just get you so successful that you can donate a bunch of time and a bunch of money in places that you feel good about. But let's not pretend that our business clients that are nonprofit minds or business plans like, Let's just not do that.

251

00:43:53.860 --> 00:44:12.990

Stephanie Bogan: And so that's where the client profitability, analysis, tool If you guys have not done That is a really wonderful exercise to go through, because it will, in very simple terms tell you, if you need to do any right sizing of the client base. It shows you the relationship between revenue as a business. This is the only variable you care about is humans. There's a lot more that goes into it

252

00:44:13.000 --> 00:44:14.399

Stephanie Bogan: Brands and culture

253

00:44:14.490 --> 00:44:23.320

Stephanie Bogan: One. What's my revenue? Two? What are my services? Capacity, right? What do I have to do in exchange for that revenue? Three. What's my margin?

254



00:44:23.660 --> 00:44:29.069

Stephanie Bogan: So how much you make everything in the middle equals what you end up with.

255

00:44:29.080 --> 00:44:48.640

Stephanie Bogan: And we just as advisors don't tend to from that place of service and doing our best. Don't have a lot of structure about that Middle East. Who are we serving? How many, what type, What are the fees. What services are they getting? You guys have heard us talk a ton about that when you put those structures in place. That's where you can provide that deeper value, even more efficient.

256

00:44:50.710 --> 00:45:01.169

Stephanie Bogan: All right, Let's see. Uh social media currently punish you if you don't send people off their platform LinkedIn, How do you drive to website. Let's see. I'm not sure if I can find the question here.

257

00:45:01.770 --> 00:45:11.119

Stephanie Bogan: Let's see highest rated question at the moment. Danny, can you recommend a third-party partner to provide guidance somewhere to begin for podcasting and video other than five com

258

00:45:11.130 --> 00:45:27.130

Stephanie Bogan: uh it's a great question practice uh fivecom is our go-to resource because they have really great video podcasting course. Uh, we have a lesson in the library, on video and on podcasting. From then the Adam and Taylor over time I would go there.

259

00:45:27.140 --> 00:45:35.699

Stephanie Bogan: Um! And then I would really look at. What do you want to do, Danny? In terms of like video and podcasting aren't? The same thing. Is it one or both?

260

00:45:36.710 --> 00:45:41.209

Danny Michael: I want to do a video, the vlog, and then have it repurposed to a podcast until it block?

261

00:45:41.220 --> 00:45:42.089

Yes,

262

00:45:42.580 --> 00:45:54.169

Stephanie Bogan: So you have a couple of options, one you can, Diy, if I cost, did I think, a less than this



year. But I think last year, and also a lesson on how to get yourself set up for video. They do have a video course.

263

00:45:54.180 --> 00:46:12.760

Stephanie Bogan: If you Google video courses, i'm sure there are more out there. Um! It really comes with. Get your camera, set up your lighting, et cetera, which I know we've covered in those lessons into what's your content plan. Who's your audience? And what do you want to say to them? So whether it's a podcast or a blog or video, it's about your content outline.

264

00:46:13.070 --> 00:46:23.849

Stephanie Bogan: There are lots of ways to come up with those. Go look at other people's, podcasts, blogs, and videos do not blatantly rip them off. Get a general idea right? And then come up with your own version of that.

265

00:46:23.860 --> 00:46:35.069

Stephanie Bogan: So that's a really good place to start. Ah, clients literally every time clients ask you a question. If they ask you three times you turn it into a blog, a video or something else like That's just.

266

00:46:35.090 --> 00:46:43.689

Stephanie Bogan: And then, Danny, what you ultimately want to do is get on a cadence depending on the the frequency of what you're doing right? A podcast gains will be different than a bloggings,

267

00:46:43.700 --> 00:47:06.690

Stephanie Bogan: which is, What's your system for just putting that place? Do you sit down every Monday morning for an hour and record three videos right? Do you have every you know, every Tuesday, for you know one Tuesday a month you do loads of podcasts, so one it's about getting yourself just the format set up right if it's blog, it's going to be on your website clock. So you've got some web work there, et cetera marketing. How are you going to share this with people,

268

00:47:06.800 --> 00:47:17.890

Stephanie Bogan: and then, once you've got that piece, it's what your content plan. What are you going to talk about, and how frequently and then right building the systems on the back end to make sure you're managing your time and efficiency.

269

00:47:17.900 --> 00:47:18.700

Stephanie Bogan: And



270

00:47:18.710 --> 00:47:40.580

Stephanie Bogan: so, bycom does have some great resources there. We've got some resources there that are wildly free. So I would always start with the free ones. Um! And you've also got loads of people in the community. Patrick's gonna Come, talk about Youtube we have. So I do a post on tribe. Uh, and just ask if anyone's back with great success around video. Obviously, Taylor and others are doing great on podcasts.

271

00:47:41.400 --> 00:47:43.129

Stephanie Bogan: Does that help a little? Bit?

272

00:47:43.140 --> 00:47:44.789

Danny Michael: Yeah, It does. Thank you.

273

00:47:44.800 --> 00:47:45.649

You're welcome.

274

00:47:45.660 --> 00:47:48.589

Stephanie Bogan: So what's your follow-up question as you hear me talk about that?

275

00:47:50.390 --> 00:47:51.629

Danny Michael: Um,

276

00:47:52.290 --> 00:48:12.219

Danny Michael: you know my fault question would be. I looked at up. I basically looked at um search for retirement podcast, and there's like tons of retirement podcasts the next credit for me. Why do I differentiate myself all these other ones that I I have an idea. Um, you know I work exclusive with with retirement, and I do financial life planning. So I really want to talk more about

277

00:48:12.230 --> 00:48:17.789

Danny Michael: kind of personal growth, spiritual growth, and how it the best life in retirement in addition to all the finance.

278

00:48:17.800 --> 00:48:22.990

Stephanie Bogan: So for you, it's really about retirement planning for people who want to get even more



out of retirement

279

00:48:23.000 --> 00:48:23.790

Danny Michael: correct?

280

00:48:23.800 --> 00:48:32.690

Stephanie Bogan: Yeah. So that's the core messaging. And then, like you can have so many conversations around that. So what I always say is like, Put your client in the middle, and think about the wheel of life.

281

00:48:32.700 --> 00:48:51.590

Stephanie Bogan: What are they doing? Where are they going? Hobbies, vacation? Every one of those things is a conversation that you have permission to have. And, Danny, By the way, there are lots of retirement. Podcast. There's going to be five X number of retirement podcasts in five years, and it's still a teeny, tiny, teeny, tiny piece

282

00:48:51.600 --> 00:49:11.640

Stephanie Bogan: of the market overall, because it's really about no different than a planning firm. Are you? The person in front of them when they decide to listen to your podcast? Is it your social media Ad. Or your blog, or your client testimonials on the website or right, you're speaking somewhere that makes them go. Ooh! That would be an interesting podcast. Your your market, Danny, is not

283

00:49:11.650 --> 00:49:26.419

Stephanie Bogan: on in general. Random people going Retirement, podcast. You'll pick up people that way. But the lift that you'll see in your community will largely come from right. The branded marketing that you do to drive the blog with the podcast to support your leg.

284

00:49:27.910 --> 00:49:31.830

Stephanie Bogan: So again, the more specific your messaging, the more effective it will be.

285

00:49:31.840 --> 00:49:54.090

Danny Michael: Yeah. And I just, you know, evolved to that. I which I also asked in the chat was Um. Before I do any particular marketing plan, I do want to send a survey to my clients to get a really good understanding of what kind of content they want to see what they're interested in, and what platforms they want to participate on um, and also just give me feedback, as i'd be better. Is there any I've looked on the I of this library? I didn't see any kind of templated surveys, or anything like that activity



286

00:49:54.100 --> 00:50:06.390

Stephanie Bogan: there there is. There's we're working on this for next year. There's It's a naming thing So Tiffany did a lesson just to retreat on the Client Advisory Board. We have recorded versions of it, and there's one. It's the client,

287

00:50:06.400 --> 00:50:12.190

Stephanie Bogan: and we can't record the app version. Are we going to work that less than the client Advisory Board?

288

00:50:12.200 --> 00:50:19.089

Stephanie Bogan: But we talked about doing it as a tribe talk, because I think it was really excellent content if we have interest on that.

289

00:50:19.100 --> 00:50:32.299

Stephanie Bogan: Yeah, and we've done that. Is it the client interview Allison. Is that what we call it in the library. There's a whole lesson, and like a set of questions where I think it's called client Interview, Danny, look it up. If not, let us know we'll help you find it,

290

00:50:32.310 --> 00:51:00.670

Stephanie Bogan: and it's about going to your clients and saying i'd like to learn a little bit about you. Could I ask you some questions, and I think very much to that point. It's amazing If you go to your five or ten favorite clubs and say, Hey, we want to do more awesome work with people like you. And we're putting together a strategy. And we just kind of know, like what kind of content you consume online. Where do you consider it? Are you on LinkedIn or you're not on listed? Do you talk to your Cpa? Do you talk to your friends Because that will sort of merge some themes,

291

00:51:00.750 --> 00:51:12.940

Stephanie Bogan: and then like, Hey, when you think about this stuff, and you have to be honest like, hey? If we were sending you a blog every week talking about stuff, or once a month. What kind of stuff are we missing that you'd like for us to be talking about,

292

00:51:13.260 --> 00:51:20.679

Stephanie Bogan: and they'll be like, Oh, well, Danny, it'd be really great if you could send us this or that once we're like, Okay, Great thanks for letting me know.

293

00:51:20.730 --> 00:51:35.989



Stephanie Bogan: So those conversations are really powerful. I know, Danny, we do. I know we have resources. There's a lot in there. I can't say that I Haven't made with everyone in the memories. Perfectly. Uh, but I know that we have a whole client interview process and questions in there. So uh just look at the client. Interviews can't find as well.

294

00:51:36.000 --> 00:51:37.890

Danny Michael: I got it. Got the link already. Thank you.

295

00:51:37.900 --> 00:51:42.399

Stephanie Bogan: You're welcome Uh! Let's see Patrick Ortman. How are you there?

296

00:51:42.740 --> 00:51:47.350

Stephanie Bogan: How do you prevent the website from being a never-ending project? Do you want the honest answer

297

00:51:47.360 --> 00:51:50.430

Stephanie Bogan: hit? Yes, we don't you don't?

298

00:51:50.440 --> 00:51:54.950

Stephanie Bogan: Ah! Because website is your front door. Now,

299

00:51:56.140 --> 00:52:01.090

Stephanie Bogan: when was the last time that someone walked into your office and said, Hey, I want to hire a financial advisor.

300

00:52:03.000 --> 00:52:19.539

Patrick Ortman: Yeah. But when it comes to your office like a physical office you're not constantly renovating, but with the website it feels like every three to six months. There's something that I want to reconfigure, and I or the website, just being an example of just the whole onboarding process. And at the end of the day, if you're building a small

301

00:52:19.550 --> 00:52:25.990

Patrick Ortman: Excuse me a small practice. It's not like. I'm trying to build a lead. Gen. System that's going to get me twenty clients a month. That's not anything I have.



302

00:52:26.000 --> 00:52:27.390

Stephanie Bogan: Yeah, that's it for, anyway. So

303

00:52:27.400 --> 00:52:31.610

Stephanie Bogan: so you shouldn't. So here's what i'll say, there's maintenance

304

00:52:31.650 --> 00:52:58.749

Stephanie Bogan: right? And then there's right like mapping. What's next. So your maintenance is gonna be you looking at your Google analytics each month, and you should be using that information to determine if there's anything that you might want to be what you could do it quarterly. By the way, if you're if you're a revenue in the pipeline, is where you want it to be. But it's about. What's your system for looking at that data, because data is just there to tell you a story. That's it. Our job is to look at the data and discern

305

00:52:58.760 --> 00:53:18.079

Stephanie Bogan: the story that it's gonna that it's gonna tell us. If you're constantly updating a website like you should not necessarily need to be versioning your website every three to six months, so you should be looking at it through the lens of. Does it tell the right story to the right people in the right way. Right? Go see branding and website lessons.

306

00:53:18.090 --> 00:53:37.880

Stephanie Bogan: And then, once that update is done and the call to action is working. You should be looking at it. Rate that data weekly, monthly quarterly depending on your cadence and then using that to refine the website. But you shouldn't need to be so when you say like revising it every three to six months. What do you mean by revising?

307

00:53:37.920 --> 00:53:43.290

Stephanie Bogan: Are you like rewriting the copy? Or Are you just changing a couple things like, What are you trying to solve for

308

00:53:43.300 --> 00:54:00.599

Patrick Ortman: everything? From tweaking the copy on a page to adding, You know, add a video, you know, change the intake forms. Ah! Or questions that you give your respective client like lots of little things like that that are not nothing. But they're not like a total re You have either.

309

00:54:00.750 --> 00:54:13.429



Stephanie Bogan: No, and that's where. When you do that first launch of a website or the those iterative launches you might really be spending more time and energy on it the first year. It's not necessarily and shouldn't be ascended and forget a strategy

310

00:54:13.520 --> 00:54:21.339

Stephanie Bogan: and most advisors websites. If we're really honest or set it and forget it. Strategies. I built the website. I've never looked at my Google analytics,

311

00:54:21.350 --> 00:54:43.990

Stephanie Bogan: the phone rings or it doesn't ring. My overall numbers are okay or not. Okay, And we don't really look at our website through the lens of it really is the front door that people knock on in the absence of great physical offices. People literally go to your website to decide if they're going to make contact with you. I mean. That's just that. Whether it's blog or podcast, or referral, or a best friend,

312

00:54:44.000 --> 00:55:01.609

Stephanie Bogan: they're always like ninety. Nine point nine percent of the time they're going to go to the website. So the question that I would ask is Yes, you should be looking at it on a consistent basis, and maybe tweaking. But you shouldn't necessarily be updating the copy and everything everything to six months, unless it's not really hitting.

313

00:55:01.620 --> 00:55:16.029

Stephanie Bogan: In which case, if that's really persistent, we might just want to look at it and say, Hey, is it hitting those five best practices that we talked about? And can we tweak those to see if we could really reduce the kind of the drag on that ship, if that makes sense.

314

00:55:17.320 --> 00:55:33.999

Stephanie Bogan: So. Yes, you should be looking at it an ongoing basis, because it's like you're It's like basically If you had a house and people walking down the street and deciding whether they wanted to talk with you based on your house. Would you want your front to be neat and tidy in your house to be clean? Or would you want it to look like a for a grown mess.

315

00:55:34.650 --> 00:55:36.640

Stephanie Bogan: You'd want it to be me and tidy.

316

00:55:36.650 --> 00:56:00.959

Stephanie Bogan: And so that's why those website lessons are so valuable, so great, Patrick, it's like, Let's look at that. Are you hitting those five best practices, and then are there near-term tweaks that you



can make, and then, monitor, that because tweaks are cool, but they're only valuable if we're using them within the context of the data. And we know that we're actually improving our performance. Otherwise, you're doing this very random

317

00:56:01.060 --> 00:56:13.189

Stephanie Bogan: instinct level change based on what you're feeling at the time, and that's the part we want to kind of minimize and make sure we're getting a little bit more scientific about it. If that makes sense, does that help?

318

00:56:13.200 --> 00:56:14.390

Patrick Ortman: It does? Thank you.

319

00:56:14.400 --> 00:56:15.189

Stephanie Bogan: Okay.

320

00:56:15.200 --> 00:56:16.969

Stephanie Bogan: And if you need help with that, let me know.

321

00:56:17.580 --> 00:56:18.890

Stephanie Bogan: I love websites.

322

00:56:18.900 --> 00:56:20.369

They are very important.

323

00:56:20.640 --> 00:56:30.719

Stephanie Bogan: Uh, Terry has a great question. What's the easiest, most distinct way for me to uncover my wide? It was a Candace question, Terry, you there,

324

00:56:32.920 --> 00:56:34.180

Therese Nicklas: i'm here.

325

00:56:34.380 --> 00:56:44.940

Stephanie Bogan: What! What? Where are you with your? Why, if you had to answer that question right now and then, how would you share it like. If you're right talking with your friends what's stuck in you,



326

00:56:45.500 --> 00:57:03.190

Stephanie Bogan: I feel like it's not succinct. I feel like it's like too involved. Okay. So when I was looking at you know the why, and then you know what we do, What's the change we want them to have, and who do we do it, for I think i'm very clear on. Who do we do it? For

327

00:57:03.200 --> 00:57:12.399

Therese Nicklas: I know that. And I think the change I feel like I'm probably ninety, five percent of the way where I want to be with that. But with the why,

328

00:57:17.940 --> 00:57:29.730

Therese Nicklas: what is it that I love about the business? And Why do I? Why am I here like? Why am I in this world with this business? And for me it's

329

00:57:30.270 --> 00:57:32.989

Therese Nicklas: I love helping people.

330

00:57:33.000 --> 00:57:36.440

Therese Nicklas: I really am passionate about

331

00:57:36.450 --> 00:57:54.560

Therese Nicklas: seeing somebody go from a place where they're scared. They're nervous. They're um totally uncertain and just making things making life very simple for them so that they can go step by step and feel really confident in their money decisions.

332

00:57:55.110 --> 00:57:57.570

Stephanie Bogan: Okay, who are your ideal clients?

333

00:57:58.000 --> 00:58:06.959

Therese Nicklas: Gen. X-professional or entrepreneurial women that are going through a change that is kind of

334

00:58:07.710 --> 00:58:16.720

Therese Nicklas: making them really assess their finances. Usually it's some sort of a liquidation or a L.



Some windfall situation.

335

00:58:16.770 --> 00:58:24.810

Stephanie Bogan: So It's so easy for us to get stuck on the what we call the what or the how we do financial planning, or we do it this way or that way

336

00:58:24.940 --> 00:58:51.089

Stephanie Bogan: Getting to the why is the sometimes the hardest work that we can do? Because it's squishing around the edges. It's ambiguous, and at the end. We all kind of provide clarity, confidence, control. A piece of mine right about's retirement like blah blah, blah! How do we make it different? And we only need fifty to one hundred particular. It's been a while it's successful, so we just have to find a way that when they hear it they get right. Whether it's Teresa's plans or Patrick's, they get that really sharp knife of

337

00:58:51.100 --> 00:59:00.850

Stephanie Bogan: you. See me. You hear me and understand me. So your clients are those Jen actors right? So So this is true. Pretty much of everyone, but it's How do you speak to it?

338

00:59:01.010 --> 00:59:04.160

Stephanie Bogan: What's their emotional state when they come to you.

339

00:59:04.450 --> 00:59:09.980

Stephanie Bogan: Usually it's confusion and fear right? And why would they want to solve for that?

340

00:59:10.240 --> 00:59:22.479

Therese Nicklas: Because, being confused and fearful is very uncomfortable, and they know that This is something that I've heard many times that when they come to me they have this opportunity.

341

00:59:22.720 --> 00:59:34.289

Therese Nicklas: Maybe it's um. You know some sort of a a windfall that they're getting a divorce, and they have some some pay out There's something involved there, and they know they don't have a second chance to get it right,

342

00:59:34.300 --> 00:59:40.089

Therese Nicklas: and they feel very strongly that I can't screw this up. I have to get it right the first time.



343

00:59:40.100 --> 00:59:52.419

Stephanie Bogan: So for all of you. And This, by the way, is pretty true for retirees and business owners and women in transition. The reason that people go get planners is because they don't know, and they don't want to mess it up.

344

00:59:52.960 --> 01:00:13.249

Stephanie Bogan: That's why the whole Can I count on you? It is the biggest question you can ask, even beyond. Do I have enough money because you're not in charge of whether they do or not, you're definitely in charge of whether they can count on you to keep them informed. Keep them aware, and make sure that they, even if they're going to run out of money. They know all, or that it's going to happen right. Can you sit in that space?

345

01:00:13.260 --> 01:00:22.840

Stephanie Bogan: So then we've got the Y, the freely part of the Y, and then we've got the functional part of the Y. So here's what I heard Teresa say. Understanding her audience once did not screw it up.

346

01:00:22.850 --> 01:00:35.599

Stephanie Bogan: They still have a long runway. They're not retiring tomorrow, per se. So I heard her say something that essentially says, we've got a step by step process for helping. Insert right clients here. Make smart money decisions.

347

01:00:35.980 --> 01:00:38.420

Stephanie Bogan: That's your functional Y.

348

01:00:38.610 --> 01:00:46.040

Stephanie Bogan: That does not mean you put all those words on the website, Theresa. So all wise, all brands have substance. It's relevant.

349

01:00:46.050 --> 01:00:51.190

Stephanie Bogan: Is that relevant to Rsa's audience. Yes, it is. Is it sticky? No,

350

01:00:51.200 --> 01:01:10.050

Stephanie Bogan: nobody think goes. Ooh! I need some of that who I want to wake up and have a step by step, financial planning process for me like no one wakes up. What's that? They just wake up and go.



What? This feeling Go away. I have questions, and I want answers. I have confusion, and I want clarity. That's the from. And two state that you all are ultimately selling.

351

01:01:10.210 --> 01:01:26.229

Stephanie Bogan: I can get you from here to here. You can do that functionally, hey? A simple step-by-step process to help Gen. Xers get the financial guidance. They need to make smart money decisions, or it could be so. That's a fear based straight, functional decision.

352

01:01:26.450 --> 01:01:29.939

Stephanie Bogan: The feeling version of that is always aspirational.

353

01:01:30.070 --> 01:01:39.060

Stephanie Bogan: We never lead with Don't Lose at all that's not inspiring right. We lead with right. So you talked about optimizing opportunity to optimize

354

01:01:40.100 --> 01:01:44.190

Stephanie Bogan: Right? So that's your some version of that is the feeling. Why,

355

01:01:44.200 --> 01:01:52.670

Stephanie Bogan: right, like you're gonna make more of your financial life. And then the question is always, Why do people want to do that? Why would they spend money.

356

01:01:53.260 --> 01:01:57.149

Stephanie Bogan: What are they going to get out of it that they would actually pay for

357

01:01:57.630 --> 01:02:06.000

Stephanie Bogan: if you said to them, Hey, i'm going to give you this. There's a ninety percent probability that if you follow my advice, we're going to get there. Would they do it

358

01:02:06.230 --> 01:02:25.020

Stephanie Bogan: so for us? It was, Would you like a million dollars one day off practice. That's the functional version. The aspirational version is a wildly successful business in life that you up The aspirational version is much more an open to interpretation. Mary's version of a wildly successful business is different than Teresa's is different than choice.



359

01:02:25.210 --> 01:02:41.430

Stephanie Bogan: A million dollars hundred day off is an anchor concept. So your brain goes like it don't like it. Yep. I want to know more about that. And then there's always like a year version of success. It might be five hundred thousand. It might be this. It's literally just something that says, this is possible. Are you interested?

360

01:02:42.520 --> 01:02:51.640

Stephanie Bogan: So, again for each of you. It's very similar, but it's for your clients, your voice and your brand.

361

01:02:51.650 --> 01:03:04.790

Stephanie Bogan: What's your market position? If you're the friendly firm you're probably not going to lead with a step-by-step process, because that's really functional right. If you're the friendly firm you might say I trusted partner to hold your hand through

362

01:03:04.800 --> 01:03:23.290

Stephanie Bogan: same concept different language, and that's where we want to look at. Who's the client? What emotional state are they coming to us in? Are they like? I'm retiring? I got some tax issues I need to deal with that. Keep as much money out of Uncle Sam's pocket as possible. It will lead with a functional message

363

01:03:23.300 --> 01:03:32.720

Stephanie Bogan: if they're really coming to you going. Oh, my God, return it's so confusing! I just don't even know I don't have like. Then you're going to lead with more of those y messages. Your brand's always going to include both.

364

01:03:32.770 --> 01:03:34.580

Stephanie Bogan: That's why you get websites,

365

01:03:34.590 --> 01:03:49.890

Stephanie Bogan: but what we know is they're only going to spend like seven seconds on like four pages, right four slots on your website. So you want to be really clear about what why you want to lead with right? So on a website you might take that core, brand, and it might be

366

01:03:49.900 --> 01:03:55.600

Stephanie Bogan: right. Ah! Like what's the number? One thing that your clients would love to



accomplish that they can't.

367

01:03:55.750 --> 01:04:02.809

Stephanie Bogan: They don't think they can accomplish without you. When you think about all those conversations priority clarity, right?

368

01:04:03.200 --> 01:04:06.750

Therese Nicklas: That's the thing that I hear over and over again,

369

01:04:06.760 --> 01:04:16.789

Stephanie Bogan: so we can build a message around. Clarity on my website is Clarity is the first step to financial freedom.

370

01:04:16.800 --> 01:04:22.790

Stephanie Bogan: Right? So that's super relevant substance, not sticky, just being honest. Right?

371

01:04:22.990 --> 01:04:40.419

Stephanie Bogan: So that's where Again, because you have one point five seconds, according to the brain research for their brain to be. And of course people are people right. We like sticky sex and messages. And so that's where you want to take the core of that message that's really working, and just refine a little bit to say

372

01:04:40.430 --> 01:04:46.540

Stephanie Bogan: right. Finally, finally a financial partner that can turn your questions into clarity

373

01:04:47.460 --> 01:04:48.759

Stephanie Bogan: like Bam?

374

01:04:48.780 --> 01:04:54.299

Stephanie Bogan: Am I Am I selling everything I've ever done? Am I selling everything Teresa can do? Nope.

375

01:04:54.440 --> 01:04:59.979

Stephanie Bogan: But, I added finally, By the way, because what's the emotional state that she shared



with me.

376

01:05:00.630 --> 01:05:06.760

Stephanie Bogan: They're just to hear like just I'm done. I just want to know finally implies you've landed.

377

01:05:07.640 --> 01:05:10.879

Stephanie Bogan: We we got whatever you're looking for You've hit it

378

01:05:11.140 --> 01:05:21.050

Stephanie Bogan: right or wrong, is going to be the rest of the sentence, and that's their job, right? Not yours, Theresa, but finally is a very specific word that says, Pay attention. We think we have the answer.

379

01:05:21.290 --> 01:05:30.279

Stephanie Bogan: So again I'm making this up on the fly right? We would look at your overall brand and right kingdom file like, How does everything really follow a narrow line, so that

380

01:05:30.290 --> 01:05:46.009

Stephanie Bogan: if your market position is the friendly firm it's going to be the next line might be something like finally a partner. You can count on to turn those great questions of comedy complexions and do it. Questions and a clarity complexity, and do a clear path,

381

01:05:46.020 --> 01:05:58.610

Stephanie Bogan: you know. Ah, uncertainty into you know i'm making it up right. I I love alliteration. I can't find a you word right now. Uncertainty unparalleled, you know. Uncertainty that turns into eco

382

01:05:59.510 --> 01:06:04.520

Stephanie Bogan: like in seven seconds. You guys, if i'm her client, am I going to at least want to know more. Yes or no.

383

01:06:05.320 --> 01:06:08.390

Stephanie Bogan: Now you get permission to talk about the what and how.

384

01:06:08.400 --> 01:06:15.150

Stephanie Bogan: Oh, here's a download here the seven questions that right Jedxers have, you know, to



really not mess it up.

385

01:06:15.300 --> 01:06:26.679

Stephanie Bogan: So when you think about your brand, it's not just. Hey? Am I getting the message right? It's. Am I massaging that message in a way that my audience can best hear it?

386

01:06:26.700 --> 01:06:34.350

Stephanie Bogan: And that, quite honestly, is the work. Some people are really natural at that. Some people have to work at it. That's why there are firms out there that do it.

387

01:06:34.360 --> 01:06:49.279

Stephanie Bogan: But you don't have to go. Spend twenty five thousand dollars to just do a little work to come up with a slightly better headline, to add some proof of concept right to just be really clear about? What's the value? Prop: What is one thing, or the three things they're going to get

388

01:06:49.290 --> 01:06:59.190

Stephanie Bogan: after working with you, and we love to put all our processes in deep detail on the websites, and that's cool from a proof of concept point. You know what the research says about the number of people who spend time on those pages.

389

01:06:59.280 --> 01:07:01.630

Stephanie Bogan: Probably zero very little,

390

01:07:01.670 --> 01:07:11.189

Stephanie Bogan: very little. I was on a website yesterday. I was on Youtube doing something, and a thing popped up brilliant marketing. You guys look it up. It's a thing called Blumen.

391

01:07:12.950 --> 01:07:15.979

Stephanie Bogan: It's so. You guys want to take a second look at it together,

392

01:07:15.990 --> 01:07:18.109

Stephanie Bogan: and I can tell you like you guys want to do that.

393

01:07:18.440 --> 01:07:23.729



Pamela Jacobs: Let's check this out. Let's go to this website. Let's see if I can find it. Lumen comm

394

01:07:25.120 --> 01:07:29.029

Stephanie Bogan: It's a device that basically hacks your metabolism.

395

01:07:29.800 --> 01:07:34.790

Stephanie Bogan: Let's see. Let me see, Lumen metabolism.

396

01:07:38.730 --> 01:07:41.680

Stephanie Bogan: Here we go. So i'm going to share my screen with you.

397

01:07:42.090 --> 01:07:55.680

Stephanie Bogan: Is that l u, m l n it's l u, m, e n dot m e, which is why it was hard to find. So the first thing I would do to tell them to come up with a better web address, but that's all a separate conversation. All right. Can you guys see my screen?

398

01:07:57.540 --> 01:07:59.570

Stephanie Bogan: Do you see Slido or Lumen.

399

01:07:59.660 --> 01:08:00.990

Therese Nicklas: Wait, Let's see.

400

01:08:01.000 --> 01:08:10.930

Stephanie Bogan: Okay. So on the web on the Youtube version, the ad said, Here you go the first device to hack your metabolism. Oh, shit, you have my attention.

401

01:08:12.970 --> 01:08:15.060

Stephanie Bogan: Am I a forty-nine year old woman

402

01:08:15.440 --> 01:08:17.790

Stephanie Bogan: who might want to lose five or ten pounds?



403

01:08:17.800 --> 01:08:25.390

Stephanie Bogan: Yes, I am. Did I run this school I go. What is that gigantic old headline? How many words are on this page?

404

01:08:25.970 --> 01:08:31.159

Stephanie Bogan: There's their call to action. Look at that. It's going to give you every opportunity to buy this product

405

01:08:31.560 --> 01:08:47.039

Stephanie Bogan: the first device to hack your metabolism. Their market position is new and better. So anyone that's progressive or thinking right. Those people that are like I'm never going to change. Those people are not checking this website out. I am not those people I was like who

406

01:08:47.290 --> 01:08:59.069

Stephanie Bogan: you guys here you hear me talk about. We help so that they can benefit one benefit to and benefit three. When you see right here ever so conveniently it has fat, burn, lose weight and boost energy. Naturally,

407

01:08:59.080 --> 01:09:14.860

Stephanie Bogan: what are my call to actions? One take a quiz two, i'm convinced I want to buy. Now that's the entire home page, their website, I promise you. They got capital, and they paid a bunch of good people to build this website for them. They did not make this up on a Saturday night at eleven o'clock.

408

01:09:15.220 --> 01:09:16.679

Stephanie Bogan: Yes, Andrew.

409

01:09:18.229 --> 01:09:35.579

Stephanie Bogan: Oh, proof of concept right there on the second panel. Guys, I do not make, hey? We are credible. You can trust us. This is not some puffy new device You're going to spend one hundred and fifty bucks on that isn't going to work. Now look at everything else so clear it starts with the breath. It's possible

410

01:09:36.380 --> 01:09:56.000

Stephanie Bogan: the science isn't new, but the technology is ooh. I'm interested. Oh, here's some smart stuff, probably never going to get that far, and we sold up on the top line. Here are my like pair of



client testimonials, smart people I want to be these people absolutely the gold standard market position, new, better, awesome

411

01:09:56.260 --> 01:10:04.020

Stephanie Bogan: track your metabolism. Now we get into how it actually works customize. How far did I go to get into the What In the hell?

412

01:10:04.030 --> 01:10:08.919

Stephanie Bogan: And, by the way, were you not sold or not sold before I ever got there.

413

01:10:09.410 --> 01:10:15.009

Stephanie Bogan: What's interesting about this? Is that the hero image, the the opening panel

414

01:10:15.030 --> 01:10:17.989

Andrew Hatherley: doesn't have a picture a stock photo

415

01:10:18.000 --> 01:10:19.689

Andrew Hatherley: a forty-nine year old woman

416

01:10:19.700 --> 01:10:20.389

Stephanie Bogan: with you

417

01:10:20.400 --> 01:10:21.989

Andrew Hatherley: which we've been conditioned to do.

418

01:10:22.000 --> 01:10:24.789

Stephanie Bogan: Yeah, now, there's lots of photos throughout

419

01:10:25.030 --> 01:10:37.740

Stephanie Bogan: loads and loads. Now again, you guys don't have quote a device. It could be a picture of your beautiful one beach financial plan at the Home as your website. There's so many things that we can put there that we're just really terrified to



420

01:10:37.770 --> 01:10:46.869

right look a million breasts around the world. What if you had something like this with pictures of your clients? And it said right. One hundred and seventy two lives. Serve

421

01:10:48.310 --> 01:10:51.630

Stephanie Bogan: awesome sauce right? One hundred and two entrepreneurs,

422

01:10:51.640 --> 01:11:02.739

Stephanie Bogan: you know, found their freedom one hundred, and you know Gen. Xers growing into their confident future. It's not. And I say this was all like It's not complicated.

423

01:11:02.870 --> 01:11:14.009

Stephanie Bogan: The rules are pretty straightforward. So imagine if you did a website using a template like this. It would be so cool, right like, Hey, take control of your financial life,

424

01:11:14.020 --> 01:11:30.389

Stephanie Bogan: you know, Every year we're going to meet. You know we're going to do a blah blah blah and make sure that you stay on track Right picture of you a plan Here, hey? We're gonna meet with you, Quarterly, that we're gonna do. Here's a picture of your process, whatever that like. They're giving you such succinct information.

425

01:11:30.660 --> 01:11:35.490

Stephanie Bogan: But it feels like a story that for me that resonates with me.

426

01:11:35.500 --> 01:11:44.509

Stephanie Bogan: I was like, Ooh! I got to find out what like I click on all of it, because when everyone does good marketing. I want to find out. But I was like dating. I think I might want to buy one of these things,

427

01:11:45.290 --> 01:11:50.110

Stephanie Bogan: because i'm all about performance, hacking like they so target marketed this thing,

428

01:11:50.120 --> 01:12:00.589



Stephanie Bogan: and I promise you I will now, until I buy one of the things these ads will pop up on my Youtube beyond everything else that I see, because they know that i'm interested because I spend a little bit of time here,

429

01:12:00.600 --> 01:12:03.220

Stephanie Bogan: and then all they have is benefits and support.

430

01:12:03.230 --> 01:12:06.159

Stephanie Bogan: I know him by the way he's really cool. I know his girlfriend.

431

01:12:08.680 --> 01:12:22.180

Stephanie Bogan: So what if you just had the key factor in Your success is smart, financial planning, like. What if that's all it said the key factor in your retirement. Success is smart, financial planning. That is right there. Marketable

432

01:12:22.330 --> 01:12:24.370

Stephanie Bogan: boom front page of your website.

433

01:12:25.610 --> 01:12:29.290

Stephanie Bogan: Well, now, what did I? Just what did I Just lot? Lay the line on Andrew.

434

01:12:29.300 --> 01:12:35.970

Stephanie Bogan: Well, we do smart financial planning, and if I don't look further, I might be really messing it up. I am compelled to keep looking

435

01:12:37.180 --> 01:12:42.029

cool stuff like, hey? We'll do a plan. We'll do retirement planning. But notice again,

436

01:12:42.250 --> 01:12:51.420

Stephanie Bogan: it's not what they're the how they're not spinning. How are they they telling me how this thing works at all? Do they tell me anywhere how this thing works? High level? Yes, low level. No.

437

01:12:51.790 --> 01:13:12.950

Stephanie Bogan: So again I know that it would like Flip most of you out. And again, you probably not



going to do a dark black one for most of your clients. But imagine, if you made your website this clear, this concise, and it is compelling, because all it's saying is, Do you want what we have enough proof of concept to go? Do you want to have a conversation so I can show you how I deliver all this awesome sauce.

438

01:13:12.960 --> 01:13:28.600

Stephanie Bogan: We put everything in the website because we think they're going to read it like an academic class of University Assess. All of our awesome

439

01:13:29.200 --> 01:13:41.769

Stephanie Bogan: people make their decisions based on a feeling. Does the front page grab me? Am I going to go to the second panel. Is that compelling? Enough that I'm going to either hit the call to action or scroll down if I scroll down, i'm interested.

440

01:13:41.780 --> 01:13:53.910

Stephanie Bogan: So What are the what's the data that you're going to share with me in that exact spot to make sure that you use that interest to get me to the call to action. Ideally sort of nothing else. I get your email.

441

01:13:54.710 --> 01:14:01.289

So I love those things because there's super fun examples everywhere. I go. Restaurants, Youtube. I'm always like, okay,

442

01:14:01.300 --> 01:14:09.559

Stephanie Bogan: Great brand, awful brand. But that I thought was really I was sitting there. I started. I'm like, Oh, my God! I can talk about this tomorrow, because it's so

443

01:14:09.830 --> 01:14:11.300

Stephanie Bogan: potent

444

01:14:11.310 --> 01:14:17.650

Stephanie Bogan: whether you like it or not, is not the point. And I hope you all are catching that. What's the point.

445



01:14:18.420 --> 01:14:21.690

Stephanie Bogan: That is a dang sharp knife.

446

01:14:24.840 --> 01:14:26.600

Stephanie Bogan: It's a sharp knife.

447

01:14:26.880 --> 01:14:29.000

Is your brand that sharp?

448

01:14:29.030 --> 01:14:43.079

Stephanie Bogan: Or are we doing knowledgeable and caring, and experience with this many words. By the time we get to the third line our brain literally skims like every fifth word, because we just can't pay that much attention.

449

01:14:43.090 --> 01:14:50.519

Stephanie Bogan: You do it. How many of you diligently read every page, and some of you do, but not most of you.

450

01:14:50.820 --> 01:15:08.689

Stephanie Bogan: We skim and we go. Ping radar. Is it working? Is it? Working? Is your brain is constantly triangulating everything and going. Do I take the next step? That's all. A website is two. I take the next step has Mary has Andrew? Has Bob created a clear enough brand calling

451

01:15:08.750 --> 01:15:13.990

Stephanie Bogan: that I go, whatever that is. I think I want something I need to learn more.

452

01:15:14.000 --> 01:15:24.009

Stephanie Bogan: Or actually, that sounds great, but it is one hundred percent, not for me, and i'm not going to borrow hop, Berry or I'm not going to bug, marry, or Teresa, or jump with that phone call just about the ray fit

453

01:15:24.740 --> 01:15:30.670

Stephanie Bogan: so hopefully that's a good example to like how you can. Really, again. It's a really

454



01:15:30.780 --> 01:15:46.400

Stephanie Bogan: a sexy example. Obviously it's product. But those core lessons, if you go back and look at it, are one hundred percent solid, and if you went through your website, and you had that limited space so that you had to hone the message

455

01:15:46.410 --> 01:15:54.280

Stephanie Bogan: to the why first, then the what, and then a teeny bit of the hell what would be different about your website?

456

01:15:56.610 --> 01:16:02.300

Stephanie Bogan: So that was fun. All right. Uh Danny, does that? Uh, let's see. Did that help a little bit.

457

01:16:04.500 --> 01:16:09.089

Stephanie Bogan: That was Danny David. Oh, that was me that that did help a lot.

458

01:16:09.100 --> 01:16:24.179

Stephanie Bogan: Oh, good, Teresa. Yeah. The next one's from Danny Danny. I have a face group with two thousand members that I started five years ago. I've pasted content, but I haven't booked prospects. I'm not sure what to do with it all right. So how many of you have heard me say? Consistency compounds!

459

01:16:25.800 --> 01:16:29.599

Stephanie Bogan: How many of you have ever gone on a date with someone that you really liked,

460

01:16:30.850 --> 01:16:35.620

Stephanie Bogan: and if you like them, do you like date them again like? Do you try to date them again the next week,

461

01:16:35.810 --> 01:16:41.509

Stephanie Bogan: and the next week, or do you like? I'll take three months off, and then i'll show up and just hope that you want to go out with me again

462

01:16:41.520 --> 01:16:43.509

Stephanie Bogan: be like being dang i'm on the door like Oh, it's been so!



463

01:16:43.590 --> 01:16:44.709

What do you think now?

464

01:16:45.690 --> 01:16:54.009

Stephanie Bogan: So all digital marketing is about consistency, consistency compounds, and when you start it will, without question feel like nobody's listening

465

01:16:55.050 --> 01:16:59.899

Stephanie Bogan: period, and you simply have to put on your big boy and girl pants and get okay with it.

466

01:17:00.090 --> 01:17:16.880

Stephanie Bogan: It doesn't mean you do it for ten years, Right? You've got to check your data, refine and home. But over one, two, three years. That three year runway that we talk about. You should start building an audience, but it has to be consistent. So we talked about this in the branding session of the treat, the secrets to marketing success, or in the back of your shamp

467

01:17:17.850 --> 01:17:20.500

Stephanie Bogan: apply small concentrated dose

468

01:17:20.780 --> 01:17:23.349

Stephanie Bogan: lather rents. Repeat.

469

01:17:24.130 --> 01:17:43.210

Stephanie Bogan: So the biggest mistake we make with marketing is, we don't do it consistently, or we do it here, miss, or we go, hey? I did it once, and it didn't work, and That's the hard part which is so, one, Danny, you. If you're going to nurture an audience, you, it's like a girl you want to marry. You Were going to have to show up consistently, or she's not going to believe they need it.

470

01:17:43.810 --> 01:17:52.390

Stephanie Bogan: So the question is for that group What's the right cadence? Is it A. You know, a daily, you know, just a quick like I'm always on social with a little thought. It's like a quick thing

471

01:17:52.400 --> 01:17:58.010



Stephanie Bogan: right? And then There's very specific like, hey? We're going to post this. We're going to do some stuff,

472

01:17:58.020 --> 01:18:20.439

Stephanie Bogan: hey? Every week. Let me just start at the Mojo, So that's now on the LinkedIn Newsletter. Right? So what is the strategy for nurturing that audience just like a coi or a prospect? What are the topics? Right? So This is where you want to stack and repurpose all your marketing. What are you doing elsewhere that you can pull in, hey? We did a podcast. Here's a two minute clip and an article hopefully. It'll be helpful.

473

01:18:20.450 --> 01:18:39.120

Stephanie Bogan: So when you're nurture marketing communities, you're building trust equity and credibility. Do I have permission to so to make an offer at some point. And when we ask when we extend the offer before we get the credibility, or we're not consistent, we don't tend to get a lot of traction in those communities.

474

01:18:39.130 --> 01:18:52.490

Stephanie Bogan: So, Danny, when you think about like, how have you showed up in that community? Has it been consistent. Have you had a clear position, and have you nurtured that, and then given people a very clear offer or call to action?

475

01:18:52.550 --> 01:18:57.990

Danny Michael: And I mean, that's my my my question was more. I understand that you got to be consistent.

476

01:18:58.000 --> 01:18:58.490

Yeah.

477

01:18:58.500 --> 01:19:21.050

Danny Michael: Content. And then and then you could ask for Maybe you have a Webinar and Q. And A. Such as I get that. But my question is more, you know, as I, as I develop my marketing strategy overall marketing strategy, Where does this root fit in? There? Is it a place where maybe I have someone that posts my website? Um. They provided email address, and in some of the fault emails. Say, hey? Also, if you're not ready to start apartment yet,

478

01:19:21.060 --> 01:19:25.389

Danny Michael: go join our group. We answer lots of questions there, Bubble, but like, I guess that's



what i'm trying to find out. Where's it?

479

01:19:25.400 --> 01:19:46.890

Stephanie Bogan: Yeah. So that would be one of your right thing about your sales funnel, and when they come in. They, you know. Whatever it is, it's Hey, if you like information here we have like. I would have right like how you can take action on this information you could download, you call us, hey? We have a community dedicated right to support it, you know financial confidence, or whatever your brand is in this community.

480

01:19:46.900 --> 01:19:54.119

Stephanie Bogan: So I would one make sure that you're promoting that. And then to make sure that what you're doing in the community

481

01:19:54.130 --> 01:20:16.349

Stephanie Bogan: is intentional. It's it's a legion, and yes, a community is a community. But you want to look at it through the lens Of how am I nurturing it? What's my system for showing up what's my content plan for showing up? I'll call it personal track, like I am going to pop in once a day, twice a day, Tuesdays and Thursdays like engagement really matters on social.

482

01:20:16.360 --> 01:20:25.770

Stephanie Bogan: You need to go in. Look at people's, posts, comment on them, Do post when people comment on you or you've got to comment on everything that like

483

01:20:25.780 --> 01:20:55.339

Stephanie Bogan: when the person's more, is it worth having? Something like this versus just captured email address? It's the more traditional way to, you know, feel bad dance or Webinar campaigns. This is going to take a lot of effort to time, and I also, I don't know whether there's a lot, you know. I have a one million dollar minimum of the U. S. I don't know how many Bible prospects live in there. If i'm going to be spending a lot of time that I don't want to put a bunch of needs are across the so so trying to figure out exactly how it's just worth keeping in my knee, and that was the best way to do that

484

01:20:55.350 --> 01:20:59.690

Danny Michael: versus other ways to capture in, you know prospects.

485

01:20:59.700 --> 01:21:06.050

Stephanie Bogan: Yes, so one communities can be an incredible way because they come to trust you and like you



486

01:21:06.740 --> 01:21:21.089

Stephanie Bogan: right? So the question is, why are we showing up in that consistent, credible way with consistent value Drops, right? Hey? Here's the and so we want to look at those very specifically. What kind of traction are you getting there, and then how are you? You have to have a conversion strategy,

487

01:21:21.100 --> 01:21:35.850

Stephanie Bogan: not just say to people. I show up my show and my show up and assume that they're gonna take that extra leap of clicking the button. Some of them will. But the research shows that goes a lot. The numbers go way higher when you put something we call it The offer. When you put an offer in front of them

488

01:21:35.860 --> 01:21:49.610

Stephanie Bogan: is the offer free, and phone call is the offer of financial assessment. So that's in a nurture community like this, Danny. We want to build like a Mini campaign. So we want to look at. I look at the data that you have like. If you've got any leads from it. How consistent have you been?

489

01:21:49.620 --> 01:22:09.069

Stephanie Bogan: For the most part you're going to be repurposing content here. So anything else you do anywhere. It's going to be just shooting it over to this, so I don't. I wouldn't suggest This has to be a lot of time. You might pop into the community right. You might just have a fifteen minute block in your calendar in the middle of each day where you pop into that community,

490

01:22:09.080 --> 01:22:28.590

Stephanie Bogan: do a quick post, and then, you know, twice a week, or once a week on a just a very consistent schedule. You might have something that's substantive versus personal like. Here's a video. Videos are great, by the way, because they build connection and community much quicker than emails. So I build out a campaign that says, Hey, i'm gonna post a video a week with a resource,

491

01:22:28.600 --> 01:22:36.639

Stephanie Bogan: right? Because, hey, i'll build that connection a little bit faster or hey? I hate video. I'm working on it. I'll start with the resources that i'll build up to the video.

492

01:22:36.650 --> 01:22:52.959

Stephanie Bogan: But you're really trying to build trust equity as quickly as possible for you. I wouldn't give up on it until you've really gotten clear that you've pulled all the levers to really make the most of it, because once a community likes you and you put out an offer,



493

01:22:52.970 --> 01:22:56.990

Stephanie Bogan: they'll simply some percentage of them will automatically always take you up on it.

494

01:22:57.140 --> 01:23:10.679

Stephanie Bogan: And so the question is, can we get a big enough community? Can we nurture them in the right way? Can we get an offer, and then for Danny and the rest of you It's how much is that? How much of my time, money, and capital is that going to take relative to something else.

495

01:23:10.690 --> 01:23:19.570

Stephanie Bogan: So a lot of you have things that you're doing that are not producing at the level that you want yet, and if you give up on them. My experience is

496

01:23:19.580 --> 01:23:34.639

Stephanie Bogan: until you've gone through a thoughtful, intentional evaluation process. What have I done? What's the data? Tell me, Have I maximized it. The odds are overwhelming that you're giving up before you really determine if that's going to be a good leg and strategy for you.

497

01:23:34.690 --> 01:23:55.400

Stephanie Bogan: We just get busy, and we don't tend to do that. So, Danny, to answer that question legitimately, I would need data on this strategy and the other strategies. How many people are coming to the website? How many you know, how many interactions are we having on Facebook? What are those other Legion strategies doing? And then you want to look at that in the aggregate, and then say, where's my business coming from now?

498

01:23:55.540 --> 01:24:04.789

Stephanie Bogan: Where do I think I want to drive business in the future, and if you're doing too many things we might just say, Hey, look! They could all be awesome. We got to go from five to two.

499

01:24:04.800 --> 01:24:06.590

Stephanie Bogan: Let's look at the data and

500

01:24:06.600 --> 01:24:18.089

Stephanie Bogan: or our instincts, and pick the two that are most compelling to us. So if that answers the question, just make Sure, you're not doing too much, Because if you're doing five things, you're going to



have to spread yourself really fed.

501

01:24:19.070 --> 01:24:26.279

Stephanie Bogan: Um, like yeah, post-one tribal, I mean, let me know a little bit more specifically what you're doing. Or if you've got that data and we can talk through it.

502

01:24:26.290 --> 01:24:27.840

Danny Michael: Okay, Thank you.

503

01:24:27.880 --> 01:24:34.690

Stephanie Bogan: Yeah, Because marketing is always about time, energy, and capital. Where are you going to invest it? And so we tend to do a lot of efforting

504

01:24:34.700 --> 01:24:44.590

Stephanie Bogan: or not. A lot of efforting. What I mean by that is, I've done some stuff over here, but I haven't really done it with the intentional discipline approach that we talk about.

505

01:24:44.600 --> 01:25:05.169

Stephanie Bogan: I Haven't looked at the data. I haven't really refined the craft. I have it right. Tweaked it, checked it, and I made sure i'm doing everything I can to for the levers, and we want to show anything to work. So something that's not directed at Danny. By the way, this is just human nature we're like. Oh, let's just show this thing over here because it's new, and it's shiny and quite honestly. We haven't met failure. Let so it feels better.

506

01:25:05.360 --> 01:25:11.370

Stephanie Bogan: And so with marketing as I wish, I could tell you that you just start something, and it's magic, and it works

507

01:25:12.670 --> 01:25:32.230

Stephanie Bogan: right. Those little pop. What are those little Ah, you know, Pop rocks you put in your mouth. You just pop them, and it's like Shhh! It's amazing. Marketing is a bit of art and a whole lot of science. It is about systems. It is about the data that is not changing. By the way, it is becoming increasingly that way.

508

01:25:32.570 --> 01:26:00.030



Stephanie Bogan: So if you would do a lot of Coi work, obviously a lot more organic. But you could still look at how many emails are going out to your cois. How many of them are opening those emails? Right? If you're doing educational campaigns and videos, how long are they? Are they opening them? How long are they watching them? What level of referrals do you have relative to that? When you step it up to the referrals increase when you do events to the referrals increase. So if you were going to look at data through the lens of really cool art,

509

01:26:00.040 --> 01:26:06.910

Stephanie Bogan: ten, twenty percent and loves of really awesome data. Eighty percent. Would you look at your marketing differently?

510

01:26:07.990 --> 01:26:13.990

Stephanie Bogan: So we'd love to talk about the storytelling because it's so powerful and potent getting people to come,

511

01:26:14.810 --> 01:26:36.310

Stephanie Bogan: and the work at that point is then putting them through some kind of a legion sales, funnel, via allegiance, or blogs, or podcasts and websites, where they not only come, but it's a catalyst to clarify who is a good fit for us, and who's not so that we can start to really move the needle on those conversion numbers. Even for Cois we track all that data.

512

01:26:36.320 --> 01:26:48.689

Stephanie Bogan: How many, C Y's do I have? How many communications and touch points went out to them discord. How many were personal, how many were systematized? How many phone calls do we get? How many client people became clients? What level assets do we get?

513

01:26:48.700 --> 01:27:13.430

Stephanie Bogan: And you can look at that data. By the way, you can track all that in a success shift to really easily. I know, because That's how I started. I had to put it all on that subscription to retract it month after month, and with that data you will surface a vast amount of information that tells you what's working and what's not working, and all we have to do, if we're honest, is get calm enough and not busy enough in the midst of everything else to sit in that space and look at the data and say,

514

01:27:13.640 --> 01:27:15.019

Stephanie Bogan: what's it telling me?

515

01:27:15.290 --> 01:27:32.280



Stephanie Bogan: Because my knife sharp is my knife Doll. Do I need my hey? Do I need to look at my website through the lens of like? Let's look at the data and see if this thing is working. And so that's what we hope we can help you guys bring to marketing is we want to give you the sexy and the sizzle and the art, the fun and the right, the gooi stuff.

516

01:27:32.290 --> 01:27:45.010

Stephanie Bogan: But what makes us marketing work beyond telling a story people want to hear is, How do you use that data and all of your marketing platforms to create conversion? That is one hundred percent. What it's about

517

01:27:46.490 --> 01:27:48.400

Stephanie Bogan: Does that help a little bit, Jenny.

518

01:27:51.190 --> 01:27:53.139

Stephanie Bogan: The rest of you. Does that help a little bit?

519

01:27:53.880 --> 01:28:08.230

Stephanie Bogan: I did. If you do. If you have follow up questions around that, send me the data and let's let's talk through it. Um, Ella, I want to take six months off next year from maternity leave, but I want to wrap up my marketing efforts. So how do I do that? Hello! Where are you? That is a fabulous question.

520

01:28:10.140 --> 01:28:11.410

Elizabeth Taylor: I'm here.

521

01:28:12.060 --> 01:28:13.290

Elizabeth Taylor: Hi!

522

01:28:13.300 --> 01:28:27.590

Stephanie Bogan: So i'm gonna open this up to the community, because you're all really smart people. What advice would you give Ella, as she thinks about taking time off without sacrificing, keeping that marketing into going? We're not a junior advisor.

523

01:28:27.600 --> 01:28:29.800

Stephanie Bogan: Okay. So there's one idea. What else?



524

01:28:30.000 --> 01:28:36.259

Stephanie Bogan: If that junior advisor is a marketing person? Right? That is that so? Is it service or marketing. Ella.

525

01:28:36.310 --> 01:28:49.080

Stephanie Bogan: Um. I think the marketing is bringing people on. But if i'm on maternity leave, i'm planning to do not have people come on, for you know, or new clients for three to six months.

526

01:28:49.090 --> 01:28:53.889

Stephanie Bogan: So you want to ramp up the marketing, but not necessarily the sales process Legion.

527

01:28:53.900 --> 01:28:59.990

Elizabeth Taylor: Yeah, yeah, I guess That's it, because I would put in a you know, a wait list,

528

01:29:00.000 --> 01:29:05.300

Stephanie Bogan: you know. I got excited after the conference, and I was like I mean, I do all these million things, and then i'm like, Wait,

529

01:29:05.520 --> 01:29:06.490

Elizabeth Taylor: Maybe not.

530

01:29:06.500 --> 01:29:21.919

Stephanie Bogan: Well, you you may do them all. It's in what order of priority you might attack them. So one all the standards up right, whether's blotting, or podcast, or any all of those it's about what channels you're going to choose to drive the Legion. And then for you

531

01:29:21.930 --> 01:29:31.430

Stephanie Bogan: one, i'd make sure the website's really clear and compelling, too. I would have an online sales funnel, because that is the shortest distance between. That's your filter without having to be there.

532

01:29:31.440 --> 01:29:36.130

Stephanie Bogan: And then that filter can basically say, Hey, we think we'd be a great fit,



533

01:29:36.140 --> 01:29:57.279

Stephanie Bogan: and I happen to be on maternity leave. So here's a waiting list. We'll be happy to work with you and Adam. I just saw that Adam's here. I just goes run. Adam and I had this conversation once a couple of years ago, and if they don't want to wait, then they don't want to wait. But that doesn't negate the fact that you don't have to work with them like There's no magic button unless you want to work at midnight or on eternity.

534

01:29:57.290 --> 01:30:05.880

Stephanie Bogan: So it's about. How do you craft that message so that it really tells the story in a way that that works for you. But that's online. So funnel go ahead. And

535

01:30:05.890 --> 01:30:23.529

Adam Cmejla: yeah, we did have um before we before retreat, because the next option for triage calls for me was like the first week of December, and I think it was like three or four prospects reached out in the course of one week. They're like really not able to see. Can I really not get in until December,

536

01:30:23.540 --> 01:30:39.759

Adam Cmejla: and it was like pretty pleased. Can you like they'll wait now, admittedly, just because of growth plans for the firm, we we ended up opening up one week. I think it's the first or second week of November for that call, but they're still gonna wait eight weeks, so

537

01:30:40.150 --> 01:30:43.179

Adam Cmejla: we will wait for call on the advice and stand by that.

538

01:30:44.070 --> 01:30:48.190

Stephanie Bogan: And if they can't uh hi! I'm gonna to see you. I don't know if you're

539

01:30:57.200 --> 01:30:59.130

Stephanie Bogan: I just. I didn't know you were there.

540

01:30:59.140 --> 01:31:00.790

Stephanie Bogan: That's a reason.

541



01:31:00.800 --> 01:31:12.559

Stephanie Bogan: This is a mindset conversation. And again, you know whether it's maternity leave, or you, Adam, is at capacity. Our brains are like you've got to find a way. You've got to find a way. You've got to find a way you're like. Why,

542

01:31:12.710 --> 01:31:23.389

Stephanie Bogan: like at the end of the day. There's a certain amount of you only have so much right. If time is a bucket, there is genuinely, only so much of it as we have, and we keep trying to expand the bucket

543

01:31:23.400 --> 01:31:47.929

Stephanie Bogan: instead of just getting really clear about what we put in the bucket, and we're so worried about what we lose, and that's what Ella's brain is telling her. The clients you're going to lose the clients you're going to lose. You know, when her brain is not telling her. You're just fine, girl. We're going to put a sales funnel in place. The people who are willing to wait are going to wait, and you're going to have an amazing six months with your child, and you're going to kick it into gear after that, and it's going to be just fine.

544

01:31:48.510 --> 01:31:51.519

Stephanie Bogan: Our brains don't typically start there,

545

01:31:51.910 --> 01:32:00.590

Stephanie Bogan: Adam. How much like Adams now done a waiting list! What? Three or four times you've had to turn it on like he was like. Can I really like, Can I really say that? Really? Yes, we

546

01:32:00.600 --> 01:32:01.779

Stephanie Bogan: really can.

547

01:32:01.790 --> 01:32:22.540

Elizabeth Taylor: We did a different like. We do our waiting list now differently, in the sense that there's not really a waiting list. It's just like we'll do this the calendar, the ah, the week of the twenty, nine. So after Thanksgiving as a firm, we'll sit down and map out all of twenty, twenty, three, and during that time I think this year we had one, two, three, four, I don't Let's call it

548

01:32:22.660 --> 01:32:26.889

Adam Cmejla: nine or ten weeks throughout the year in which I do triage calls,



549

01:32:26.900 --> 01:32:48.310

Adam Cmejla: and so, just as we talk about surging client appointments. I surge podcast recordings. I search triage calls. I search one page plan presentations. We search on like everything in your practice can be clinical, surged, we're doing the same. So that essentially is our waitlist. Our wait list is just. Our is just us controlling our calendar

550

01:32:48.320 --> 01:33:03.789

Adam Cmejla: to the extent that this is when we want to be an onboarding vote. This is when we want to be in in podcast mode. This is when i'm going to be with limitless. So nothing is going to happen during that time. This is when i'm speaking at optometry conferences. So nothing that i'm doing. That means that's time for Kathy and John to be onboarding. So

551

01:33:03.800 --> 01:33:20.979

Adam Cmejla: what makes a lot of this question, and all of us, from a time management standpoint easier, is when you. Just think of your calendar like an orchestra who are the key components in your orchestra, while we have climate reviews. That's your violent right. Whatever metaphor you want to use, but then it's just a matter of laying up that calendar.

552

01:33:21.010 --> 01:33:34.079

Adam Cmejla: I think him as an orchestra. Think of as a chessboard. However, you want to think about that. You have a finite number of resources, i. E. Days on the calendar after you block out your time, and then it's just a matter of positioning those chess pieces, so that

553

01:33:34.250 --> 01:33:50.550

Adam Cmejla: the symphony um, you know twenty two metaphors here, but hopefully it makes sense that they are independently collaborating with one another relative to your time out of the office, and declined to the client and prospect experience. So that's how we created our waitlist. Not so much of saying

554

01:33:50.560 --> 01:34:01.559

Adam Cmejla: the next, like acuity, is our wait list. You want to talk with Adam Drape, and next opening on our wait list, quote Unquote is the first week of November. That's the way in which we've done it for the past.

555

01:34:01.830 --> 01:34:21.120

Stephanie Bogan: This is, I think, is, if my memory search right. This is the second year, and short of every now and then getting an email like next time is three months from now. Um! And truth be told. But



somehow there was a little which in acuity, where I should have had that weekend November opened up. I don't know what happened, but it shouldn't have been that long.

556

01:34:21.620 --> 01:34:22.650

Adam Cmejla: But

557

01:34:22.930 --> 01:34:25.549

Adam Cmejla: you just can't book a triage call whenever you want,

558

01:34:25.700 --> 01:34:32.509

Stephanie Bogan: and I really want to echo that. Notice the confidence with which Adam communicates that

559

01:34:33.990 --> 01:34:51.509

Stephanie Bogan: that confidence comes from the experience of having lived through it the first time we had that conversation. It wasn't quite as confident, and it was, Hey, we'll put up a message and let's frame the like the languaging. So it comes off in the best possible way, like we're awesome, not we're haughty.

560

01:34:51.520 --> 01:35:08.010

Stephanie Bogan: And then from there Adam was able to realize that people would not die. A good number of them would wait, and then ultimately was able to tweak it and refine it so that I think right. Just doesn't Even now it's just. This is when we next have availability of people have issues they'll reach out.

561

01:35:08.020 --> 01:35:23.819

Stephanie Bogan: So notice that as he got more and more clear and confident that this was not going to be the end of his practices, he knew it, that he's been able to ramp it up to Now, what is what? Six, eight, nine weeks of waiting time? Is it possible that he's losing people absolutely?

562

01:35:23.830 --> 01:35:35.090

Stephanie Bogan: What does it matter if he doesn't have the capacity to serve them. This is where we get into that. Oh, my God, I have to take them, Because because because and then we're working at eleven o'clock at night, going

563



01:35:35.270 --> 01:35:52.169

Stephanie Bogan: so just to understand like, however, you do it, It's a function of getting clear that you only have so much time and capacity. How big is the bucket? What space do you have left? And then who do you want to put in that bucket, and ultimately how right leg and and marketing is all about how we get them.

564

01:35:52.940 --> 01:35:57.990

Stephanie Bogan: Um! So, Ella, It may be that some people don't want to wait for you on maternity leave.

565

01:35:58.000 --> 01:36:09.989

Stephanie Bogan: And that's okay, because it means their needs are so pressing that that's where they are. But the people who are right for you are going to be right there in the right time and space, and they're going to be the kind of people that are like. Oh, how awesome!

566

01:36:10.050 --> 01:36:25.289

Stephanie Bogan: Kristy Rains. We'll put it in the next inbox insight. Just had her baby. If anyone has Baby Reed, he's so beautiful. Ah, he's amazing! She has amazing pictures. Nice letter to all her clients like, hey? I'm out for the next blah blah, blah, and

567

01:36:25.300 --> 01:36:26.800

Stephanie Bogan: oh, pale, are good,

568

01:36:26.880 --> 01:36:38.489

Stephanie Bogan: and her clients are going to be, I know, like just wildly supportive, because that's the nature of it. And anyone that doesn't want to wait for Kristy is not someone that Christie wants to work with, because she's all about family,

569

01:36:38.500 --> 01:36:44.249

Stephanie Bogan: and anyone who wants to work with her is going to be like Yes, we love what you're talking about. We want to wait and have that conversation.

570

01:36:44.440 --> 01:36:52.020

Stephanie Bogan: So this is where confidence is really what it goes down to. We know there's a fifty to one hundred and fifty clients for all of you to serve



571

01:36:52.030 --> 01:37:21.489

Stephanie Bogan: it's. Can we put that marketing region right? Our Sales Legion, our marketing, and plays to drive people to where they want to have conversations with us where they can get curious, and then have conversations with us, so I know we covered a ton at retreat. The team has worked very hard this week to get all those lessons updated and posted the website. We'll share information on partners that came. If you guys again want to get in touch with any of them. Ah, please feel free to reach out to us if you'd like us to make a personal introduction.

572

01:37:21.630 --> 01:37:34.549

Stephanie Bogan: It was an incredible retreat. The feedback that we got was overwhelming. Thank you guys. I was just reading all of your messages from the beginning of this call. I want you to know that I have made screenshots of them, and they're going into my kudos folder,

573

01:37:34.560 --> 01:37:36.109

Stephanie Bogan: you know. We talked about that

574

01:37:36.120 --> 01:37:37.830

Stephanie Bogan: so someday i'm going to be like

575

01:37:37.840 --> 01:37:40.650

It's been like looked at all these amazing,

576

01:37:40.660 --> 01:37:47.480

Stephanie Bogan: just sort of just really, at Testaments to the work that we're doing here together. So I just want to. I was just reading them all.

577

01:37:47.490 --> 01:38:00.869

Stephanie Bogan: Thank you guys so much for your level support, and I hope that you feel it from a fuel it from in to next space. I know i'm committed Adam and Tiffany and Jerry just love working with you guys, Michaels and the Carls and the Phycons and everyone else does, because

578

01:38:00.880 --> 01:38:30.870

Stephanie Bogan: I think this is a community of people that are growth minded that really want to elevate themselves and each other. And so I hope today's call helps you guys to do that. Uh: join us in in Inbox. Join us on tribe if you've got any questions uh Liz is doing her uh my set calls every Friday. So if you get stuck, if you need clarity, if you're not sure where to go next, please feel free to. Uh go in there,



and let's get you help, and if I need to jump in, we're happy to do that as well. I, Adam Tre and I and the rest of the coaches will be on. Try. So please feel free to reach out. With that I want you all to

579

01:38:30.880 --> 01:38:38.630

Stephanie Bogan: put in chat. Just so. We can really lock in today. What was your biggest takeaway from today's call.

580

01:38:45.130 --> 01:38:47.190

Stephanie Bogan: Let's see what we've got here

581

01:38:48.310 --> 01:38:50.120

Stephanie Bogan: prioritizing time.

582

01:38:52.660 --> 01:38:54.960

Stephanie Bogan: I don't need a stack photo of another.

583

01:38:55.010 --> 01:38:57.859

I'm working on my website.

584

01:38:57.870 --> 01:39:18.070

Stephanie Bogan: Uh looking at the Lumen website. Search everything. Websites are essential. Clarity consistency compounds all right so keep on track with the niche. Don't: Yeah, don't give up. There's this weird thing like you don't want to quit on your marketing, but you also need to know what pivot, if that makes sense. I had to tell my kids like never, ever, ever quit. And then one day I had to go.

585

01:39:18.080 --> 01:39:39.950

Stephanie Bogan: Actually, you might want to learn how to pivot like You don't want to just drive something into ground. That's why the data becomes so valuable. Because with marketing, we like to say around here there was a sign on the desk of the Ceo of Sara Lee. Anyone's reported after Members Sara Lee Baking Company and the Cia, the sign on the Ceo's desk that in God we trust all others bring data,

586

01:39:40.610 --> 01:39:48.489

Stephanie Bogan: love vision. I love messaging. I love strategy. I love branding. Do you know what I love even more than that data that tells me



587

01:39:48.500 --> 01:39:59.289

Stephanie Bogan: it's working? Because if the data doesn't tell me it's working, it's working, no matter how much I like it. So that's our job. As we look at all of the opportunities from a treat can we get clear?

588

01:39:59.300 --> 01:40:20.889

Stephanie Bogan: What do we need what's working, what's not working, What's going to go on our plan as we look at growth over the next year and three years. Where are we going to invest our time, energy, and capital? And then next quarter of next year? What's the roadmap that I want to put in place to optimize my sales, my marketing, and ultimately micro attention. So, Adam, thanks for joining us. I'm sorry I didn't see you earlier. You should.

589

01:40:20.900 --> 01:40:22.540

Stephanie Bogan: That's all right.

590

01:40:22.620 --> 01:40:28.890

Stephanie Bogan: How you guys again on triber and inbox. Please let us know what questions you have, and with that go forward and

591

01:40:28.900 --> 01:40:29.800

Stephanie Bogan: well

