

LIMITLESS Coaching Call Transcript

JANUARY 23RD, 2023
MY TIME & ACCOUNTABILITY WORKSHOP

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We're gonna kick it over to Tiff and Jared to talk about how they, in their firm, individually and in their firm, have taken control of their time

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Hi! Everyone I love the after lunch special. We're here to get you super energized about productivity and time.

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I was just as I was thinking about this session day, I kept thinking, I'm like there is like 15 quotes that I have taken from Limit list that I just want you to hold on to like.

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You don't have a time problem. You have a priority problem.

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Where you focus, expands, but your time is your greatest asset, and your greatest lever.

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Time can neither be created nor destroyed, but it can be managed.

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I carry these with me all the time. We practice them in our with our team.

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These have been mapped massive game changers. I used to have have the excuse all the time.

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I just don't have enough time, and I know when stuff and I start you say a whole time she's like, you don't have a time problem.

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You have a priority problem and we'd have to go back and really get into where we focusing and what does that look like?

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So today. And what we're showing you is really about making productivity or super power.

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How you start focusing in making the most of your time, avoiding distractions, and how to manage different ways of your schedule and your email, and all of those aspects to ensure that you were focused on the things that are gonna bring you the results, and the outcomes that that you're that you have



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As a part of your vision, and so on. The screen.

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What you can see here is how we've calendered our time.

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There's some really great tools with, with limitless to start.

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You see, Tiffany's ideal schedule down there in the corner.

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I took that from the limitless. It was. What's my week, and I'm gonna start blocking every aspect of that.

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You'll see mine are very focused on revenue producing activities.

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I sit in a seat of business development that is where my time should be hosted.

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You will also see that that is balance where I want to spend my time with my head and my children and my husband.

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So I have those blocked. Number one rule is for us, is learning how to start by taking our time off for the year.

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It's really important that we are whole cells, that we're coming to work and giving our very, very best.

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Okay.

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That was a major shift at actually and very honestly took me up until 2 years ago to really implement because I felt guilty for taking time off which is the mindset work we did earlier today.

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Hmm.

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And got into taking that pto. So Jared and I look at our calendars at the beginning of the year, and we know when all of our vacations are happening.

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For the most part the occasional like fun. Vacation pops up throughout the year, and then we take that.

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And then we built that into our company calendar actually so you'll see in the bottom left hand corner.

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We have our 2023 team or firm calendar.

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We break this up in 3 core areas, we have the advice and client fulfillment.

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We have operation, fulfillment, and then we have growth and marketing.

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And what is from January into December?

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What are we gonna accomplish in those months? We have a team.

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We have several people in those areas, but also as partners of this firm.

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We're looking at like, what are the core areas? How are we also setting our people up for 6 off ensuring that they're coming in for as their whole cells, which time are they taking off?

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Can they get clear on that schedule and really build their work in a really productive way?

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Jared. I'm gonna let you take our standard work week and your sample schedule as well.

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What do you have to add? Yeah, so

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Yeah, so tiffany and I are actually sitting in the very same small office here.

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So for muting an unmuting. We're trying to get the synced up just perfectly.

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So our standard work week was really born out of how do we get to the productivity that we're looking to get to with a larger team?

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So there are 14 of us. How do we put this together?

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So that we can sync up. We also, during Covid, went into the world of hybrids.

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We have 4 of us that are here in our headquarters, 3 that are in a satellite office, and everybody else has either chosen to work from home or works from home out of state.

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So we really wanted to create these windows of time where we were all available to each other and working on



similar things.

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And then windows of time where we could focus on deeper work where we could integrate more of that balance.

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And if you needed to take an extra day, or you would just configured your your work week in a way where you could take time off.

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Friday could be a flexible day. We have unlimited Pto.

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Which is an entirely different discussion. Lots of great internal things in that in that realm.

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But really, you know, having that flexibility on Fridays is something we wanted to cross the team.

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So we've built the annual calendar for the entire firm, and said, What are the big initiatives?

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What are a big client? Surge periods, we have 3 client surge teams.

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So when is one team surging versus another? How are we doing that on an annual basis?

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And then on a week to week. How are we putting these together?

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And then as Tiffany showed you in the lower right, she built her weekly calendar, and daily calendar, just support that.

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I did mine as well. Now I'm a little more involved with our client service team.

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So I actually update mine about every 90 days. But I have scheduled blocks in there that are time specifically for focusing on projects and client work I have windows of time that are available for client meetings where our system software can see me and pull me into those meetings and then

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I have family time and personal time on there as well. One of the things that is really important to me is that 3 days a week I'm available for our kids, for after school pickup and activities and everything so that's not blocked out on my calendar and part of what we're all

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Planning around. So as you're looking at building your own, your own schedule, your own calendar, keep in mind that it has to be really adapted to what are the outcomes that you're trying to create as an advisor as a team and how do you want to put



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All of those pieces together. There's no one perfect way to do it, but accounting for everything that's important, and making sure that it has a place on the calendar is super important

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That is awesome. Thank you both a lot. I think.

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Thank you both a lot. That's great. That's great.

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I'm trying to manage Stephen over here. Okay, attention and actually form complete sentences.

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Those are great insights. Actually, what? Something that really came up that I Adam, mentioned it.

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Tiffany and Jared both mentioned it. I really want to highlight it.

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If it's not in your calendar, it doesn't exist.

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It is a wish, it's a hope. It's a click.

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Your heels together spin yourself in the chair 3 times, and hoping goes that way because your calendars specifically your annual calendar, then translated into like your 90 day calendar with your weekly schedule in your daily schedule, that funnel process.

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Says, I have a vision and I am gonna sit in that space of ownership I'm going to take agency awareness and ownership together, create agency over my time.

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I'm gonna make sure that my time allocated for work is intentional time.

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Not allocated, for work is already carved out. I'm paying myself first in time.

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Equity, and then whether that's 2 weeks or 2 months, and then I'm gonna make sure that each of the minutes of my time that I invest the choice that I make about my focus and attention, which is the the greatest level that I've got is going to be intentionally set out I'm going

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To decide in advance based on our vision, our strategy, our priorities, and our resources, and how I can best support that in the decisions we made and based on that aggregate set of data, this is how I can block my Monday through Friday from this time to this time or right I have blocks.

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Of time I go back and forth, I work for a few hours on the ski.



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I'll come back. You get really good at that after a while, but you have to have agency over the time and calendar, and that's why we kind up with things like time can't be created or destroyed.

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My team has that time. If I decide to go ski, I can split it up right.

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But to 6 h has to be the 6 h. It's gotta go somewhere.

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So the idea is if we don't put it in the calendar, it won't show up in your day.

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That is your budget. So things like reading, continuing education block for everything that's why the annual calendars there, hey?

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One Friday, a month. I'm gonna sit around with music blaring in my room and do a whole bunch of online C and make a day out of it, or what you know, whatever it may be.

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If you don't put it in the calendar, it means that you're trying to squeeze it in around the edges all the time.

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The importance of using time, blocking and using an online scheduler as the forcing mechanism and guard rails around protecting your time.

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Because what can easily happen, Hi! My name is Adam, and I had a time.

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I had a time. Management problem is, we are. We are pleasers, and we don't like to say no, and we can have the most beautiful like Tiffany's like.

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Of course, hers is color coded, and it's got like it's pretty mine does not look that way.

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It's it's blocked, but it's not as pretty as what is what Tiffany is, even if it was, I will be the first one to blow that up, because I'll make exceptions, because someone will ask can you meet with the at this day, and in the absence of me having any type

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Of willpower, or any sense of guardrails. I'll find a reason, because I like to please people, but using a scheduling software is right.

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We talked. I mentioned earlier strategic versus tactical one.

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If, it fits where you're at right now, and and you're looking for ways to free up your time and take a little bit more control of your time.

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A low-hanging piece of fruit to look at is what are the rules and conditions around?

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How people schedule to get on your calendar, and if you're not using some type of online scheduler like Acuity calendar schedule wants Chili pepper.

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Any one of these tools out there. Dere I say, I feel like that is absolutely stakes in the industry right now, and I don't care if you work with retirees.

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I don't go. We have an 85 year old client that as happy as a client booking on that.

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So again. That that's a deeper discussion for different time.

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But that is one tactical decision that you can think about.

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It's like, okay, the context here looks great. How do I apply that in my practice?

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Take it through and see. How do I get the rules in my online scheduler to mirror what my ideal day and week looks like I have 2 calendars or full team. We just went through this exercise for the year on our calendars.

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You know, like an outlook, or Gmail, who's Gmail? We have Staff's Calendar, which is my actual calendar, son, as sync with where my test come in and then we have steps, model schedule Alison's model Scheduled Lawrence model

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Schedule. So that's all gray. So everyone can see.

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Oh, the calendar link is set up, but I need to schedule work for Stephanie to review goes into very specific blocks.

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We call mark blocks right, and marketing work is on one day and content work is on another, because what I know about myself, like most of you is, there's the thing called flow and a zone right?

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There's talk time, and there's focus. I call it deep work that I have deep work Wednesdays, right? I just turn everything off.

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And put my hair to Mombun, appearing my sweats, and I'm just like I'm up to like 5 before anybody's off.

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I'm like 5 do 11 in my day is done like it's so cool like I feel so productive those are great ski days.

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By the way, yeah, that's it's very nice.

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You're like, I I love making up earlier. So remember, you've got to translate those ideas about your life and your vision into a schedule.

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That's the system that supports you. Right? People, process and platform.

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Who's who's your gatekeeper?

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Who's filtering all of those things, starting with even the biggest dealer of time.

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How many places can we find on here? Let me first this way.

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Is there any with the 4 calendars that we see here?

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Is there any block where it says email all they want? No right.

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Jared has a little block right here, whereas email red tail teams, right?

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Yup!

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This is, if I'm speaking for Jared. My assumption is let me just plug in. Get in, see?

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Workflows, activities, anything that needs my attention, where I can provide direction as to who and what is the next best step with this email is not something that lives on an entire on one monitor.

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Hi, my name is Adam, and I used to have 3 monitors in my office, because outlook was one of those out.

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Was one of those monitors all day, every day outlook was up every single day, like Adam.

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Stay focused. Yes, I was a multi- I was. I was a multi-tasking which I recently learned it's just rapid refocusing, and every time that we rapidly refocus we are destroying our productivity and our deep work. Thing so this is we've got kind of a side by side Stephanie's email

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delegation process is all in the Resources section. Admittedly it is pretty deep.

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It's pretty thorough. There is a whole process to that.

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Mine is not. Candidly, it's not nearly as regimented as what stuffs is this?

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The screenshot that you see here is of my personal email.

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This was one of the most impactful shifts that I made back in 2018 to get out of that hamster wheel of the dopamine.

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Hi activity but low impact task of checking email and of having that out thinking that.

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And it wasn't a matter of what's going to miss anything, or I.

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I didn't have this the sense that oh, what if a client emails and I need to respond back within 5 min?

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That, wasn't it for me email was it was a huge crutch that was an easy to go to task that allowed me to be busy without being productive.

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And I realized that through again, just seeing success stories from Staff and others.

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What it can mean to get out of the burden of email and realize that as an advisor that's not my best and highest use of time.

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And so we've evolved the process to now, as a as you can see here, I, the the 2 again.

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I'll I'll shift this now more from context to talk more.

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The the in practice and tactical. I use 2 tools and systems that guide how we do email in our office, the first tool that we use is something called same box, samebox.com admittedly.

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I shouldn't say I don't, for those of you that are in a broker dealer world.

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I don't know what that would mean, for you don't use that as a crutch to just say, Oh, I guess I can't do Adams version of email and and just and not address this.

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It is a tool that has allowed us to not have to look at the vast majority of emails that come in so the top of my inbox you'll see there where it says anytime.

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You see the app, the at symbol. That is an algorithm from same later.

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So we have programmed it to essentially put all. Yes, teach it program it all newsletters, junk wholesalers, investment updates, market commentary, basically anything but a client or a hand.

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Select few individuals. Everything goes into Saint News. I did the map on this, and I had it written down, but I didn't bring it with me. It's a big number.

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If you take 2 s right? This is these, this top line here at Saint Archive is 56,000 emails that neither I nor Kathy have had to make a decision on looking at same at the same news.

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And it just anything in Saint News rolls over to the archive after it gets to about 5,000.

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That's that's the limit. There. So that was, how can I remove my own mentor?

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Energy, decision, making process. All right. Let me look at technology to help filter that through the second part that I did for the things that actually did need to be seen in our firm that didn't need to be triage from an actionable standpoint I'm a big fan of David allen system getting things

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Done, David talks about in his philosophy and in his workflow organizing, you know, like gathering and organizing, and then making a decision on his next action is, can I do this in 2 min or less, if I can do it in 2 min or less? I do it?

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Now, if it's not, then it comes back to kind of that.

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3 ds. Either do it slash schedule, or I.

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I schedule it, I delegate it, or I defer it, and defer that parking lot that we mentioned this might be a really good idea later, exactly, but it's not relevant to what I'm working on right now.

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But I need a place to part that because my mind right, our minds are like the RAM on a computer they're not hard drives.

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They don't do good at storing information. They're very good at processing information.

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So the getting things done methodology in email. If I kind of all the workflow here, anything that comes into the inbox Cappy manages my inbox.



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I don't check email, but up. But for a handful of times per day, and the only action, or the only folder that I'm focused on is my next actions folder.

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But 10 my scheduled folder, and I'll talk about that here briefly.

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So when an email comes into the inbox, Kathy is the one that is monitoring the inbox, a couple of times per day, she typically will go in admittedly she's plugged into email a little bit more than you know.

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The the 1012, and 2, just because she's dealing with emails from Td Ameritrade.

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And yeah, so as emails come in, she will triage them.

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If it's something that she can answer directly. And by the way, she does this as well for our dedicated client service email address.

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So our clients at integrated Pwlvn Com is the only email that a client ever gets.

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No clients since about 2019 8. I don't think I implemented right.

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18 years. Here, too, is when we implemented the clients.

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No clients since that time has had certainly my cell phone number or my personal email address.

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So Kathy, monitors, both those inboxes, anything that she can handle that's what she does.

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If she responds to an email. That's from me.

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It says Kathy, said her on behalf of Adam Schmidt. I don't want to bait and switch.

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I don't want to clone or not. Maybe not a beaten switch.

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I want to be transparent, and people know that it's Kathy answering on behalf of me.

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It comes from Adam Matt integrated. But it's signed Kathy.



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So again, just we're being honest and level setting with the person that's that's getting the response.

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Anything that she can't do that needs me. Attention goes into a next actions folder Kathy, and I will review that next actions folder a couple times per week, and I will verbally respond to her how to answer that email got an email.

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From this aid, Adam. They want you to speak at this event.

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Great yep. Sounds good. Let them know that I want to speak between this time and this time.

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I'd love to come in on this like I can narrate that response to her.

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And now she has the information that she needs to answer that email.

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And then handle the logistics that are inevitably gonna happen from something like that.

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If it is something that I need to attend to. But it's gonna take more than 2 min, and she knows that it's gonna take more than 2 min.

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She will put it in the Gtd. Scheduled folder, and there will be a time block on M.

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Calendar. So just like Jared's just like Jared to have right.

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If I go back to his calendar here. Okay, go that. Nope.

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There, so focus, block open for client meetings, or like Jared, I thought I saw you have something here.

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Maybe it's a tips. Oh, yeah, okay.

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Yeah.

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I'm sorry. Where you have that work. Block scheduled.

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That is where I if I'm working on something or project standpoint, I know that email is in the scheduled.

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I learned this the hard way, because I used to keep things that were scheduled for deeper work on the calendar.

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In the next actions folder, and then every day that I would go to review things that I need to make a decision on I'd still see the still sitting there. I needed to get that out of sight out of mind.

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So there's a difference between something that is next actions versus something that has been scheduled.

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The other thing, for that is, I know that when I am working on my deep work time, or I am working on the the recent example that came in, hey, Adam?

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It's time to fill out your Adv. Or your 2,022 AD updates that came from my compliance.

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That's not something that's gonna take me 2 min or less that has to be scheduled.

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But I don't want to see that email every time I go into triage things that I need to act on.

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So that's why it's in the scheduled.

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And I, when I am working on that, I'm not looking at my next actions folder.

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And then someone just emailed me, yeah, exactly.

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It is you. You have no thyself right. I knew that I needed to have garbrails, and I needed to have a system, because I admittedly am very, very weak when it comes to this, and I needed to have something that was going to take me out of my element, the other thing that i'll do last point here

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Because I know I th. This is a big sticking point for a lot of advisors.

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Do not put your email online with outlook, you can take it offline.

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Do not have it set up to sync. Take away every notification, every badge, every ding, every sound.

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Take it off your phone for years. You do not need to be notified of that.

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Things in email that are important. No email is important and urgent.

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If it is that way, there's this magical thing.

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Yes, there's just magical things, yes, yes.

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So planning business, not the emergency business, 99.9% of the time, the point 1% of the time they will pick up a telephone and the snarky thing that I still badly want to say to client. Sometimes is that your lack of planning does not constitute my emergency

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Hmm.

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so, so that's great that that was a lot of like we got there so much. The thing is, we're sitting here like all the stuff I want to share with you this year is all in my head right now, I'm like we got a pace ourselves so the so We've got different.

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Examples. If you know, if you're in a larger firm, you're gonna have a lot more in that.

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And you're gonna have a lot more in that annual calendar. Right? You've got different teams, etc.

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If you're right, you and a small team are you in a service advisor? Right?

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It's simpler still, and think about things like email and scheduling.

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If you're on your own right, or you have a part time person who's doing some things, but not all things.

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The number one question we get is, well, how does this apply to me?

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And the truth is, you want to do the same, blocking you don't want to be your admin 27 times a day outside of the telephone.

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But again you can block that as well. Right? So we have open call times right?

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People can link, etc. The idea is, do your admin time and beginning, and end of the day right?

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Use your your energy, creating time for the most important things. If you take an hour or 2 h at the end of the day to do those things, or you block up 2 days in the afternoon one, you've got dedicated time where you're in administrative land or client service land or paraplanner

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or land not in, you know, energy creating money, producing land, client land, 2 very valuable side effect, as you know how long it takes. Oh, wow!

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I'd be

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It's actually taking me 4 h to do my client so right? So we're replacing my Ea, so I'm like, I got this until we get the new person.

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So I've been tracked. I do all my, so my normal 30 min slack in the morning.

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Do you know how long it is right now? 2 to 2 and a half hours?

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I know that because I do it all at once. I do what my admin would do right now.

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I've got people helping me, but I did it a couple of days when they were out.

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And I was like, okay, we definitely need to replace this person.

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You're spending that much time on average or more you're just doing it 27 times during the day.

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So, if especially if you're on your own, or you don't have a full team around you.

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Block that time when you get your first support person or you expand your team, not only do you know how much time you have.

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You've now got time, block to train and support them.

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You start trading that time. Now you're not doing it.

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Now you're using that time for training as they get trained.

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Now you're using that time for support. That 2 h becomes an hour and a half becomes an hour, and a half becomes an hour becomes 30 min a day becomes a meeting a week or 15 min check-ins.

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So it's very advantageous to block your time when you have teams, because they need a rule system to know how to block your time, or they'll just take it like everyone else.



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It's a land grab that's not intentional.

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That's not agency. And you wanna make sure that every and then, if you're on your own, you need that system to keep you focused.

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It's a bucketing strategy for your time, so that your energy zones are really aligned with the work that you're doing, and you can't.

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If you shift gears back and forth all day, you make so many decisions.

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By 11 o'clock. Should I do this? Should I not do this that you've used all of that intellectual path capacity?

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You've got for the day, and you're pushing through the rest of your day.

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I think we admittedly overestimated how much time that we have for ourselves, because I think we're Alison, are we?

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At the top of breakout sessions, did we take too much time on our first 2 sessions?

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I'm afraid that we're not gonna have as much time to get through success shift here is what we wanted to, Alison, are we?

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Okay, we're getting the money. Very good. Alright, my clients are okay. Alright.

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Yes, you're you're fine.

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So I'm gonna talk with you a little bit about the success shifter.

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We're gonna talk more about this. At the end of the day, and for many of you it's gonna become a very close ally of yours.

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Is we kick off our high performance. Happiness, success, print.

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In February. So let's talk about this for just a little bit.

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This is that box on the side of the road that tells you how fast you're going when you drive by the school you have a dashboard on your car.



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It tells you how fast you're going, but we just get in the habit of being on autopilot, and we feel in control of our speed and we cruise right on down the road without realizing we're going 10 or 15 miles an hour over the speed limit right over our right what we're

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capable of of really handling in that situation. We need that they they do those boxes because studies have shown that outside feedback loops have a great different recognition in our brain, and we pay more attention to them.

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The success shifter is that this is very interestingly, if you've read atomic habits which hope hopefully, all of you have.

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He has a form in there that looks literally exactly like this.

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We've been using this for like twenty-plus years like really should have been in in that book it's just a habit building muscle.

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This is the equivalent of a mental gem so it's gonna do 2 things.

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If you go back to that base campus, and when we talk about it, it's gonna help you identify habits and behaviors that you want to discontinue because they don't serve you.

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They don't support you, elevate you, give you joy.

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They keep you distracted, whatever it is. This is the stop doing that category.

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The second category is things I want to do more of more of this is good right?

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Reaching out to Ceos, working on my digital campaigns.

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Time for my limitless projects, meeting with my team. What date night with my wife?

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Right hitting the gym. Whatever behaviors are gonna put you in the zone personally or professionally, are the things that you want to do more of.

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You don't break habits, you build new and better ones, right?

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So your brain has neurons. You have pathways that come off of that neuron every time you think of thought or do a thing.



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Neurochemicals flow across that pathway that tells your brain.

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This is important. You have basal ganglia little gardeners of your brain that go through your brain every night when you're and the pathways that have that biochemical marker.

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They leave alone. They're like, Oh, Patrick, use this one today.

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It must be important we're gonna leave it alone. But what do we tend to think about right before?

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Bed, oh, so if we don't like how bad we are, how about like, that's what you're telling your brain.

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Hold on to those pathways all the good stuff, yeah, you don't have any time for that.

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So you don't break a habit. You build a new one and the way that you do that is, you think a different thought, and you take a different action.

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So if this is my neuron and this is my right, my neural path laser, run into this is bad, but you get it like you can see right through my brain

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I'm gonna do this thing instead. Biochemical goes down that pathway, and then I do it again.

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The next day worth later that day, and again more biochemical bricks on the road breaks on the road.

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There's this thing called neural glue. We're gonna call it glue Cause.

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That's way easier to pronounce, and it's what holds those pathways onto your neuron.

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There's only so much in it to go around, Peter, which means that if I'm thinking the new and better thought over and over, and the glues got to go over there because the glue has to go over the biochemistry goes what happens that old thought after a while because i'm

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Not thinking it as much. You've actually got a video this.

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It's so fascinating if someone's neuron and the old pathway literally falls off and floats away and dies, and the new pathways formed.



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It's really cool. So every time you think I can't do that you're telling your brain.

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If we believe this, keep this path here, and every time you say I'm awesome.

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At this I am wisdom, says Liz. Her brain goes.

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Lay the path, leave the path. That's right, and we keep that.

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And over time that becomes the default, the new and better belief system.

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That's what the success shifter helps you do it.

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Pulls that out of the subconscious back behind the curtain pattern.

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I am a huge fan I'm actually printing mine for February.

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To do this with you all which we'll talk about.

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When I started this with my principal 2530, almost 35 old, 30 years ago, I'm 50 this year anyone can like that.

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So excited. I we printed it out, and I carried it around the office to my meetings.

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I said it right, and I had an actual phone on my desk.

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Remembering your desk with the telephone. Now we are all I said it under my desk.

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I would not leave at the end of the day until I put my little checkmarks in the box, and I'm telling you, never have I found a better way to build better behavior habits, because you are so conscious, and your brain pays attention.

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If you do it, every single day, it is in that big trouble that you will improve.

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So what happens is you use it to build a better habit when you've nailed that habit, it can come off.

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Something else can come on. Yours does not have to be full I was just giving you an example in different categories.



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You should not start with 50 things. It's too much.

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You should start with a handful like 3 or 4 but I've been doing this for 20 years right? So I can really.

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So this is an example, right? I want to have my morning routine, my outside activity.

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Right is I, Axel, as well as Mike More. You can mute.

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I get up in the morning and I go to work. I walk the dog.

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The parking back right to do that. In the afternoon. I'm intermittent fasting, right?

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I somehow yeah, I did not need until 11 A. M. And gummy bears had to wait.

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Right. So I'm just right now, come like we'll talk about this had like a a lot of work the last couple of years I was like, Hey, I really wanna hit my happy high performing lane again.

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That means I got a really double down on my happy high performing home it's every time of my life I have to down on my success shifter.

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And my happy, high performing habits. Do you know what happens?

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30 days later, without fail, right, so I've been doing in January.

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We're 20 days in feeling awesome. Right? Found the lane.

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So the idea is family account community, right? And we're walk my dog 4 times a week.

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So I counted the days in February right?

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If we have family reading time 3 times a week, that's 12 times a month.

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So every night we have it I put a little chicken scratch or check mark in the box.



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If we don't man into the day I'm like, oh, didn't do it instant feedback loop to my brain. Oh, wait!

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We commit tomorrow we're gonna do this. So the idea is things like, I don't have email on here, cause that's not really my weakness.

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I've got a lot of discipline around that.

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If you check an email, you only want to check it twice a day in productivity, you might have great check email 20 today, and you have to put a chicken scratch in every time.

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When you put that third chicken scratch in what happens, to bring us, Patrick.

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That's not what you said you were. Gonna do. And then you're like, Okay, can't do 4 so I remember the first time I did this, we were going through it.

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And like, I swear, the first time it was like empty, empty, emptying into like the 20 fifth.

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And then it was like, fill it in, fill it in, and that's okay, too.

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Because it's giving your brain a backstop. It's saying, Hey, I want to do this X number of times a month.

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You only get so many free passes. And again you're creating awareness.

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You're changing behavior. And if you do it over time, it is inevitable that your habits will change.

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I started trying I'm super. We started tracking niggas.

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We love our tech platform. We're just so like for us, megos is gonna be like, did we have it take place?

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Or an issue, right? Just want to keep track of that. It's important to me and then I'm now going to track what I call my HP.

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Is my happy, high performing vibe gate like scale, one to 10.

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I'm gonna end my day with was like neutral on the line.



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Was like 6 or 7. Why was I? 6 or 7 is, hey?

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I was a 9. What today made me a 9. Hey? I was a 2.

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So just really, wanna focus on my overall state. And well, being the conscious of it, so that as I go to bed, at night and my Pm routine, it's hey, what?

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Where was I on my point today? Where was I? Not from a place of love and support?

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Do they set myself up for success that I have too much on my list, and I get distracted.

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Okay, go. Me. I'm doing the work. What do I need to account for tomorrow?

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There's no beating yourself up here. Closing a loop on the conversation.

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Tip, Jared, let me bring it back over to you.

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Anything that you would sprinkle on top of that add tech kind of dovetail into how you manage your calendars on a day to day, week, week basis, personal accountability

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Yeah, I was. Gonna say that reflection piece stuff is something that I really often do like.

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Every week. I look back on my calendar, and I take a look on like what was I set out to accomplish this week, and did I?

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I'm also really truthful with myself. What's the time that I wasted this week?

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And and why, and at what cost did that have? There's that that line.

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It's in service of what and what cost has been huge for me.

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There's been real time where I've been like I just got distracted where I didn't feel like eating the frog.

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And so that costs my time as a mom that night or my sleep, which inevitably made me better the next day, and I lost my patience right like.



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It's the hard truth to the decisions that I make to not respect the time that I have and the ways and the outcomes that I'm out to get.

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And so that reflection time is really really huge.

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And I take a look at like my mood, and and you know you can rate that on a scale of one to 10.

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What was my mood going into that? How did that client meeting go like like? How did you go into that?

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How did that client meeting go? What was your feeling afterwards like?

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How you show up in all of that, and just having a moment and a pause of just being honest and truthful with yourself.

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Really helps. But that reflection period is really important, because I take it.

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And I'm like, Okay, how are we setting ourselves up for next week?

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So I really love that you're doing that reflection as well.

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Stuff, but it's been a really important practice for me just to take that in, because instead of going 3 months or a year it's on a week to week basis, so I can make those little small shifts to keep me going the way that I'm and then the direction that I'm looking to

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go Jared

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Yeah, I I just want to echo your point, Adam, that, like our self control, is a perishable resource.

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Yes, yes.

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Right? So we are helpers that a helping profession who want to deliver for the people around us, whether that's your team or your clients.

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Hmm.

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So having the system that prevents your natural helpfulness and self-stabotage is huge, so the more that I can lean on the system and say, Nope, this reflects what I need to accomplish to deliver for everybody, and that means



constraints that's onely helpful rather

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Than that, just, you know. Never ending. String of one off exceptions and decisions which will sabotage.

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So, even though it may seem like there's constriction and constraints in that.

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Yeah.

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It's actually freedom freedom to do the right work, focus on the right things for the right people.

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That's what this type of system and review allows you to execute.

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Hey! A lot of our clients will be like oh, you know I can't let someone else calendar.

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I can't let someone else check my email. I need to be doing it.

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And then you find, now I'm like you couldn't pay me I'd be like, All right. You should pay me a 1 million dollars a year if you said Step, you have to check your own email.

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I'd be like. I'm out. There's no way it's not energy creating for me.

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I don't like it

