

LIMITLESS Coaching Call Transcript

APRIL 3rd, 2023
LIFESTYLE RETREAT OPEN OFFICE HOURS
LIMITLESS COACHING CALL

111
00:15:21.920 --> 00:15:27.250
Stephanie Bogan: All right. Let's see. We've got some questions here in Q. A coaching team.

112
00:15:27.330 --> 00:15:32.880
Stephanie Bogan: Let me, because this is team. I can't even see if my glasses all right, Daniel, are you there?

113
00:15:33.160 --> 00:15:34.160
Stephanie Bogan: Of course you are

114
00:15:38.240 --> 00:15:39.660
Stephanie Bogan: so now

115
00:15:41.360 --> 00:15:42.870
Stephanie Bogan: and over there, because you can.

116
00:15:43.200 --> 00:15:49.210
Limitless Adviser: I actually don't see her yet, I think, she added, this early. So let's circle back, Grant, are you there.

117
00:15:51.190 --> 00:16:05.950
Stephanie Bogan: Grant. Yeah, if you guys submit your questions and slide out in advance, I will. We typically start with those and they get up voted right. Do you want to talk so when you Grant's question was, Can we talk a little bit more about the difference between personalization

118
00:16:06.140 --> 00:16:17.560
Stephanie Bogan: like a limiting belief and becoming and taking extreme ownership and a Ca and accountability like a more positive practice. So Grant, do you want to give us just a little context and color for how that

119
00:16:17.570 --> 00:16:20.020
Stephanie Bogan: like what you mean, and how that showing up for you?

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00:16:20.080 --> 00:16:24.840
Grant Bledsoe: Yeah, I'm: i'm trying to refresh my memory. This is from a couple of weeks ago, by the way.

121
00:16:25.000 --> 00:16:37.120
Grant Bledsoe: and my recollection was that. you know, I think, a personalization your your call from a few weeks ago on I I'm.

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00:16:37.430 --> 00:17:01.660

Grant Bledsoe: Everything is, is my fault if it's not going totally right. Am I characterizing that right? And that? And that seems like it's a little bit at odds with this concept of taking accountability for everything in your practice, which is generally good, right? And and that was that was the crux of my question and stuff topic for today. Yeah, Can we acknowledge? No, it's perfectly fine. Can we acknowledge that there is a difference between taking responsibility

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00:17:01.950 --> 00:17:12.230

Stephanie Bogan: responsibility at its core means response. Able, as in we can take ownership for right, what happens, and our response to it, good or bad

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00:17:12.400 --> 00:17:18.390

Stephanie Bogan: and right. So in that sense, taking responsibility, personal responsibility

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00:17:18.890 --> 00:17:32.180

Stephanie Bogan: is the same. Hold on, let me back that up. A limiting story, right? I am bad is very different than I am taking responsibility. You don't have to beat yourself up to take responsibility. It's not called response, but yourself up ability.

126

00:17:32.500 --> 00:17:41.290

Stephanie Bogan: It's just called response ability. So a limiting belief. I'm an impostor. I can't do this. I'm never going to get my website working.

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00:17:41.840 --> 00:17:55.430

Stephanie Bogan: That will stop you from taking responsibility. That's the They are literally. They're not the same. They are the opposite of each other, right? Because if I can't get clear on what's standing between me and that responsibility.

128

00:17:55.470 --> 00:18:07.170

Stephanie Bogan: Adam can tell you loads of stories about right things. He worked on in limitless for a while, and then there was some moment of clarity, some insight, some recognition where he was like. Oh.

129

00:18:07.170 --> 00:18:19.440

Stephanie Bogan: I haven't really been taking responsibility. I've been right going through that efforting and activity, but it's not necessarily lined with the outcomes that I want. So they're the inverse of each other in that sense.

130

00:18:19.480 --> 00:18:22.860

Stephanie Bogan: Adam. Anything you want to add to that from just your own experience.

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00:18:24.240 --> 00:18:33.590

Adam Cmejla, CFP®: It's funny that you mentioned that because Andrew and I were just having a conversation about that couple of days ago, just the the incredible

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00:18:34.640 --> 00:18:36.950

Adam Cmejla, CFP®: journey and impact

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00:18:37.570 --> 00:18:46.580

Adam Cmejla, CFP®: that, simply changing the narrative, I talk to yourself. I can't emphasize enough how important it is to understand



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00:18:47.710 --> 00:18:52.700

Adam Cmejla, CFP®: how impactful the phrase. Be careful what you say to yourself, because you're listening.

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00:18:52.940 --> 00:19:00.260

Adam Cmejla, CFP®: How important that is, and how much that influence is, how you should open your day to day life. and the absence of actually being aware of that

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00:19:00.560 --> 00:19:07.130

Adam Cmejla, CFP®: right, John, as Wrap writes in his book, Inner size. And this is all about neuroplasticity, right? And and those of you that that

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00:19:07.660 --> 00:19:17.290

Adam Cmejla, CFP®: No, me, no step. And and you're here for a reason, right? One of the biggest differentiators of limitless is the influence of mindset work first, though, which is neural plasticity.

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00:19:17.510 --> 00:19:21.710

Adam Cmejla, CFP®: the ability to be aware of how you're showing up is.

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00:19:22.110 --> 00:19:29.110

Adam Cmejla, CFP®: I don't know what percentage it is, but it's you, because unless you're aware of what you're trying, or something. Everything downstream of that makes it very difficult

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00:19:29.470 --> 00:19:32.800

Adam Cmejla, CFP®: to change, because you're swimming against the screen. You're going upgrade

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00:19:33.850 --> 00:19:35.400

Adam Cmejla, CFP®: or against the green. I should say

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00:19:35.620 --> 00:19:36.510

so.

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00:19:37.400 --> 00:19:38.300

Adam Cmejla, CFP®: because

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00:19:38.970 --> 00:19:45.050

Adam Cmejla, CFP®: if you, if you don't understand the story that you're telling yourself all the tactics in the world of

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00:19:45.230 --> 00:19:57.720

Adam Cmejla, CFP®: getting my website up and running and figuring out my conversion numbers. And how do I script up my prospect process? All of that just becomes so much harder unless you first do the work to understand

146

00:19:57.780 --> 00:20:06.580

Adam Cmejla, CFP®: what story you're telling yourself, and what your belief stuff is. So Well, that's I. I think that and decent. Add on, if you will, to which you would say, so.

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00:20:06.780 --> 00:20:14.010



Stephanie Bogan: Yeah. yeah, Like it to Adam's point everything that you like. Every time you've made up your mind to do something

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00:20:14.540 --> 00:20:33.000

Stephanie Bogan: you've found a way, or made one. That's just how we work it's how we, when that motivation and that commitment, meet, we simply find a way, or we make one. The answer to most everything we need is on Google. Not, maybe all at once in perfect form, but that next best step right, whether it's finding a person finding a resource. Finding it.

149

00:20:33.120 --> 00:20:34.360

Stephanie Bogan: I'm going to sneeze right now.

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00:20:36.620 --> 00:20:38.580

Stephanie Bogan: you know. Pardon me.

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00:20:39.090 --> 00:20:45.250

Stephanie Bogan: i'm allergic to being inside today. That's what it is. I need the clear mountain and cool mountain air.

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00:20:45.440 --> 00:21:05.000

Stephanie Bogan: So it's about the space that we sit in, and once we know, I think there's a great story. If I don't know Matt Nelson, one of our alumni. He was at our last at this last retreat. Many of you met him. He is where the phrase the new normal came from right. He came up to me at the first retreat, and in the beginning of the year, and said, Like I don't

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00:21:05.000 --> 00:21:20.330

Stephanie Bogan: today. My goal was like 2 50, and then you told me to double it like it was 500. I have no idea how i'm going to do that. But oh, my God! And then he comes up at the September retreat, and he gets there any we're at the end of the retreat, where it I don't remember where we were at him.

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00:21:20.590 --> 00:21:26.970

Stephanie Bogan: We are in this Hong Kong, or something some place, and it's the in closing part, and he comes up to me at the end, and he's like

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00:21:27.110 --> 00:21:47.040

Stephanie Bogan: I totally get it now he's like I am surrounded by a group of people who are building that 1 million dollar one day off practice, or whatever their version is, and they're on it. They're possible they're already doing it. He's like it just created like being here just created a whole new normal right. So for him, when he went to do his website for the very first time like to update it.

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00:21:47.040 --> 00:22:01.730

Stephanie Bogan: he called up, and it had been like 3 months. He's like. I just keep putting it off, and I keep putting it off, and we had right just conversation about what was really stuck in him, as I like to say, and it turned out that he knew he was. He knew in his heart of heart that he should pick a niche before updating his website, because

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00:22:01.870 --> 00:22:17.140

Stephanie Bogan: that would mean he wouldn't have to go back and redo it, and he had been doing his inner battle right? We spend most of our time finding with ourselves about reconciling the and so that's how he's pro it showed up as procrastination. Procrastination is never procrastination.

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00:22:17.140 --> 00:22:33.010

Stephanie Bogan: It's you avoiding some feeling, experience, or outcome right? If everything is a strategy. If we're not doing things, we say, we want to do so grant does that help? You understand? A little bit like the difference? And then how it like so stealthily shows up in your day to day life?

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00:22:33.970 --> 00:22:42.030

Grant Bledsoe: It does, and Adam's add on, was helpful, too, in the doing the work of the mindset stuff of the meditating and journal, and working through

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00:22:42.080 --> 00:22:55.190

Grant Bledsoe: what you're lying to yourself about is half the battle to to get through that.

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00:22:55.190 --> 00:23:13.460

Stephanie Bogan: That's our that's our body's way of saying, Pay attention. There's something to be tended to here right good feelings. We want more negative feelings. We want bad, but we tend to stuff them down, work over them. Get busy, say we'll deal with it later. Think it's too complicated Not want to hurt somebody's feelings not know the answer, and so we just

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00:23:13.460 --> 00:23:27.640

Stephanie Bogan: work over it, and there is just a point where, when you contain all of that, you're gonna feel it. It's gonna show up. It shows up in procrastination. It shows up in uncertainty. It shows up when we beat ourselves up, when we feel like we're so behind, and we're not caught up. And

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00:23:27.650 --> 00:23:33.460

Stephanie Bogan: why are they doing more? So Our work Grant is to sit in that space of awareness to Adam's point.

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00:23:34.000 --> 00:23:38.460

Stephanie Bogan: One quick yeah, one quick. Add on to that, and

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00:23:39.480 --> 00:23:42.150

Adam Cmejla, CFP®: I just want to emphasize the importance of

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00:23:42.580 --> 00:23:45.140

Adam Cmejla, CFP®: speaking it out loud. You can't think this, though.

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00:23:45.890 --> 00:23:56.590

Adam Cmejla, CFP®: You have to talk it out, Lot. and i'm just taking that a from my personal experience as well as just when we run up a common sense that what does every Hollywood actor do every time you

168

00:23:56.920 --> 00:23:59.730

Adam Cmejla, CFP®: they sell us that it's not

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00:24:00.350 --> 00:24:07.770

Adam Cmejla, CFP®: like one of the movies that I can't wait to go see? Is there the Michael Jordan shoe story with Ben App like Matt Damon.

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00:24:07.970 --> 00:24:12.030

Adam Cmejla, CFP®: What plays Jordan's White or White Mom. Excuse me.



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00:24:12.980 --> 00:24:32.890

Adam Cmejla, CFP®: anyway. I can't wait to see that movie, but I'm not seeing Ben Apple in that name and and the Bill of Davis on screen. I've seen the characters of who they've transformed themselves into be in the complete structure that they have to play that role to sell us on screen that we're not watching them. They're watching professionals act. Why should we be any?

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00:24:33.520 --> 00:24:42.310

Adam Cmejla, CFP®: Why should we be any different when we declined conversation? When we reverse? How we're going to show up and present ourselves in people

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00:24:42.370 --> 00:24:52.270

Adam Cmejla, CFP®: most intangible product, if you will, that we sell which is financial peace of mind, financial security, and the strategies that we recommend, which are plastered with.

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00:24:52.610 --> 00:24:59.660

Adam Cmejla, CFP®: So we have to sell the most intangible product which is our beliefs, our convictions, and our advice.

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00:24:59.850 --> 00:25:15.070

Adam Cmejla, CFP®: And why would we think that we that we should be able to show up and be the best version of that? If we never rehearse it? We never, never say it all so I can't emphasize. I'm. Not how important it is to say this out loud to your stuff. Sounds weird, but it's so impactful.

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00:25:15.440 --> 00:25:29.310

Stephanie Bogan: Yeah, the most powerful drug that we have is positive emotion, belief, and expectancy. Your brain is radically hardwired to pay attention to emotion.

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00:25:29.400 --> 00:25:39.900

Stephanie Bogan: It is why guys are at such a disadvantage in certain areas, because right our social norm is, we don't acknowledge and embrace and let our feelings pass through us and surface it and

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00:25:39.970 --> 00:25:53.900

Stephanie Bogan: say it out loud and acknowledged that we feel like we just were like we're good. It's fine. It's it's great. We're moving on. And the problem is, there's a tax to that every single time. It's like a little piece of Velcro sticking you, and then you get 50 or 100 or 100,000 of those.

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00:25:53.970 --> 00:26:06.060

Stephanie Bogan: and in spite of all of the effort that you're exerting you're like, I can't. I don't feel like I can move. And so that's where we want to remind ourselves that our number one objective in life and in work

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00:26:06.110 --> 00:26:07.470

Stephanie Bogan: is to feel good.

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00:26:07.930 --> 00:26:36.380

Stephanie Bogan: because when things are working the way they're supposed to when they're aligned. Our vision of our actual self and life, and the one we're living when they're aligned, we feel in congruence. We feel ease and peace and joy, and when they're not, we don't, and our job isn't to ignore it. Our job is to surface it, embrace it, and be like, hey, Big Bear hug! What's going on here? Because on the other side of that it's some more damn peace and



ease and joy like, If you want to be happy, do the work. If you want to stay less happy.

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00:26:36.740 --> 00:26:48.020

Stephanie Bogan: Don't do the work, and so ha! The the strongest drug we have is positive emotion. Your number one job during the day is to check in and be like, do I feel good? If not, how do I focus on something that feels good.

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00:26:48.400 --> 00:27:17.050

Stephanie Bogan: I'll think about my kids. I'll think about like an awesome moment on the beach in Hawaii or Costa Rica like things that. Just naturally we're teaching ourselves how to create State state is when we make the big decisions and then lock them into our brain, so that the motivation to do. It is later. Why do you think Tony Robbins has people like spend days jumping up and down and like? Because what they're getting to is a state where their brain waves are actually in a place where what they decide goes

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00:27:17.190 --> 00:27:18.040

Stephanie Bogan: lump

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00:27:18.260 --> 00:27:33.900

Stephanie Bogan: into their head and their motivation center, and that you get rewired radically quicker, and then they leave, and it's set there like they now have that track to run on which they, of course, right, have to take massive action on right, which is what Tony Robbins is all about state and massive action

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00:27:35.200 --> 00:27:49.740

Stephanie Bogan: It that's the the formula. We talk about state stories and strategies strategies are how you take action. I'm not a fan of massive action. I'm a fan of the next best step in taking inspired action because you do this crazy, leapfrogging thing

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00:27:50.060 --> 00:27:54.470

Stephanie Bogan: where you don't have to exert so much effort. But it's all based on clarity.

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00:27:55.030 --> 00:28:12.650

Stephanie Bogan: So grant hopefully that helps you a little bit. And obviously, when we're talking to Grant, we're talking to all of you. If there is some place where you don't feel like hell, yeah, we're crushing it. I'm doing what I need to do. I'm clear. I'm focused, and i'm working on the things I need to be working on. Then that's your work. This week is to check in with that

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00:28:12.650 --> 00:28:30.540

Stephanie Bogan: like Adam talked about like he journaled profusely. I think he still does right. His first year. Whenever I get stuck on something. I always go to the journal like that's active mindfulness. So if you're one of those I can't sit still. Journaling is the best way to start or guided meditations right the ones we've talked about, how to meditate

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00:28:30.550 --> 00:28:44.350

Stephanie Bogan: by Jeff. Whatever on calm.com is awesome. He's like quoting led Zeppelin. It's 10 min. Those are the places to start. If you're not in that, it's still space. It's okay. You're right. What we're just trying to do is wrangle the wild horses

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00:28:44.380 --> 00:29:01.920

Stephanie Bogan: running through our minds like, can we just put a bridle on it so that we can focus it and then use journaling or guided meditation as a way to surface, create greater awareness. And then we all know the benefits of both of those things are well documented on every facet of your life, health, wealth. Well, being



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00:29:01.980 --> 00:29:13.410

Stephanie Bogan: so, it says Harvard, and all the other big names in neuroscience research. Does that help you guys? Is that he does that land with anyone besides Grant circle of trust here

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00:29:14.100 --> 00:29:17.970

Stephanie Bogan: thumbs up what whoops? I like You're on mute so we can't really do that. But

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00:29:18.780 --> 00:29:26.320

Stephanie Bogan: yep, so you got lots of thumbs up, Grant you're not the only one with those questions around. What do I do with the voices running loose in my in the hallways in my mind.

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00:29:27.210 --> 00:29:52.520

Stephanie Bogan: Right? Our job is to acknowledge. Hey, this is what's happening right now. I'm thinking crazy thoughts like Whoa! Is that really true? Is your first most powerful question. Is it really true? 99.9 of the time? The answer is, No, it's a story you're, telling yourself in the second, that you separate yourself from it. When you say it out loud or write it down. You're not it anymore. Now you can have objective awareness. Now you can take agency over it. That's why

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00:29:52.820 --> 00:29:54.310

Stephanie Bogan: right? We do those things

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00:29:55.060 --> 00:30:00.310

Stephanie Bogan: all right. Did Sarah join us? I know Sarah had a question, Ethan, you're here.

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00:30:02.480 --> 00:30:04.360

EthanBridgewater: you there

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00:30:04.390 --> 00:30:06.210

Stephanie Bogan: you're rolling out your new website.

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00:30:07.220 --> 00:30:19.400

EthanBridgewater: Yeah, I think the I was on the phone with the marketing firm on Friday, they said. They're gonna have a first draft to us this week, so we're gonna peel through it and see if we like the messaging and everything but

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00:30:19.800 --> 00:30:35.890

EthanBridgewater: just trying to get ideas. We're gonna be going through search so gonna maybe highlight it to the clients like as just a little fun part of the meeting, just saying, you know, take a look. See if you think this is how what represents us

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00:30:36.000 --> 00:30:39.740

EthanBridgewater: but just one of the other ideas or best practices on.

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00:30:39.880 --> 00:30:58.050

EthanBridgewater: How do we leverage this and get the most bang for our bucks, since we just dropped a bunch of money to get a new

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00:30:58.460 --> 00:31:00.130

EthanBridgewater: perfect that'd be great.

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00:31:00.650 --> 00:31:11.070

Stephanie Bogan: Adam. I know you're updating your website. Do you want anything you want to share Lauren around? Just plans for launching websites? And then i'll add, in just any general feedback in terms of what we've done.

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00:31:12.400 --> 00:31:20.000

Adam Cmejla, CFP®: Yeah, and all. Honestly, I'm kind of right at that phase of getting ready to roll out and send out that messages. I

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00:31:20.210 --> 00:31:28.150

Adam Cmejla, CFP®: i'm not. We'll mention it. I guess that we we've recently updated the

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00:31:28.800 --> 00:31:33.730

Adam Cmejla, CFP®: categorizing. I try to. I try to combine, categorized and catalogue in the one that we.

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00:31:35.460 --> 00:31:36.670

Adam Cmejla, CFP®: I to

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00:31:36.890 --> 00:31:43.110

Adam Cmejla, CFP®: catalog the podcast much better on the website, and have it a little bit more circle, so we'll emphasize it.

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00:31:43.160 --> 00:31:44.600

Adam Cmejla, CFP®: and we mentioned that.

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00:31:45.710 --> 00:31:52.980

But you know honestly, not an area that I have a whole lot of expenses, so I will be embracing that who not out here and rely on our

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00:31:53.020 --> 00:31:55.820

Adam Cmejla, CFP®: dev team, and and

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00:31:55.900 --> 00:31:59.570

that's in that process as well. But at a minimum

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00:31:59.650 --> 00:32:04.400

Adam Cmejla, CFP®: it'll be in our planning like on purpose Monthly Newsletter. It'll be on the

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00:32:04.480 --> 00:32:13.970

Adam Cmejla, CFP®: I. We we do a long folks on that. We go out, and they are so student, too, and we to every user subscriber. It will be mentioned in a podcast.

217

00:32:13.980 --> 00:32:18.850

Adam Cmejla, CFP®: Those are the 3 pillars, if you will. That what I what I anticipate



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00:32:18.870 --> 00:32:20.500

Adam Cmejla, CFP®: or low hanging through right now?

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00:32:22.210 --> 00:32:36.370

Lauren Kaufman: Yeah, even a few things to add. I love that that kind of coincides with your surge meeting time. I think you could, you know, do some, maybe like some teasers leading up to when it launches, you know, like.

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00:32:36.400 --> 00:32:45.860

Lauren Kaufman: hey, we're you know, gonna have this new website Here's a little preview or something like that, either, you know, in your emails or social media.

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00:32:45.870 --> 00:32:58.480

Lauren Kaufman: You also have a lot, you know, mostly local clients. I don't know if there would ever be any sort of opportunity to do a little website launch party or something just you know you have a

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00:32:58.510 --> 00:33:02.060

Lauren Kaufman: unique situation, since most people are near you.

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00:33:02.130 --> 00:33:08.850

Lauren Kaufman: Yeah, I think, generating excitement and leading up to it versus like.

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00:33:08.970 --> 00:33:15.490

Lauren Kaufman: hey? It's live Here it is is just more enticing the people.

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00:33:15.980 --> 00:33:28.180

Stephanie Bogan: Yeah. And i'll add, You know my experience has been that if you do a brand launch well, you will find that it creates referrals oftentimes share of wallet right? We think we have all of the money.

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00:33:28.330 --> 00:33:47.110

Stephanie Bogan: and so I believe in the library there should be a letter. There's probably a couple of samples, but it's a brand, you know, launched letter that I wrote years ago, and it basically is a letter that says, hey, changes on the inside. We want right? New, better, progressive, innovative, awesome right? Whatever right, whatever you wanna

227

00:33:47.120 --> 00:34:02.430

Stephanie Bogan: whatever messaging positions you want to put in front of them. That's your opportunity. And then it's right changes on the inside. We wanted to really reflect that on changes on the outside we've updated our website to reflect. We do our best work with right, insert brand messaging.

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00:34:02.700 --> 00:34:14.280

Stephanie Bogan: Here's the link right feel free to check it out. I love Lauren's idea of right teasing into it, and those client meetings it could be up on the website when they come into that conference room right so you could be like, hey, check out our new website.

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00:34:14.380 --> 00:34:27.580

Stephanie Bogan: Part of the follow up right. Could be that brand roll out letter. So it just depends on how you want to time it. But typically you'll do that with all of your clients. You'll do with all of your cois, you'll do it with all of your



mailing list, your social. So think about your brand

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00:34:27.960 --> 00:34:42.120

Stephanie Bogan: channel. Wheel right every touch point on that. You want to have a version of that right new and improved changes on the inside changes on the at, whatever your theme for that is. And you want to hit that pretty consistently. You'll talk about it in client meetings.

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00:34:42.120 --> 00:34:52.350

Stephanie Bogan: and then you can do if you're doing any kind of coi cultivation right? You can layer additional like like, here's a link on X. This is something we're going to be doing with clients this year. Just wanted to.

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00:34:52.350 --> 00:35:08.630

Stephanie Bogan: But you know, this is one of the ways we'll be taking that team approach we talked about so we can talk more specifically about the details of your marketing channels and how to to Adam's point. If it's a podcast, you're going to navigate it a little bit differently than if you're sending letters to cold prospects. If you will.

233

00:35:08.980 --> 00:35:16.520

Lauren Kaufman: even I, one other, and I believe we might have talked about this, but i'll share it with the group to another. Opportunity, I think, is when the website is, you know

234

00:35:16.680 --> 00:35:37.090

Lauren Kaufman: you're feeling like it's in a good place to share it with some of your ideal clients and get their feedback and say, You know we designed this with clients like you in mind. We love working with you. We want to work with more clients like you, so it can be like a low key referral strategy. But then you're also getting their feedback and making sure it lands

235

00:35:37.090 --> 00:35:47.510

Lauren Kaufman: with those clients are trying to generate more of it's a great point, Lauren, like just a few simple questions like, hey? What if you can think back on when you first came to us, what prompted you to come to the website

236

00:35:47.610 --> 00:36:03.030

Stephanie Bogan: right? Do you remember, like what are the pain points that you had like? Is there anything missing here that we should be speaking to. So it's just, I think, to her point very much like those client and Coi interviews anytime you do that. It's a natural opportunity to deepen the relationship

237

00:36:03.040 --> 00:36:10.740

Stephanie Bogan: deep in the messaging which just naturally tends to increase referrals. If they are a referring type of person.

238

00:36:10.840 --> 00:36:12.180

Stephanie Bogan: So hopefully that helps

239

00:36:13.200 --> 00:36:17.110

EthanBridgewater: Yeah, very helpful. Thank you.

240

00:36:17.840 --> 00:36:20.570

Stephanie Bogan: Julie. You had a question about your website.



241

00:36:23.480 --> 00:36:35.780

Julie Betoni: Yes, on ours. Part of what we're doing is because we are going to be moving into this new niche a good chunk of our clients aren't that niche. And because we're developing a whole new service model around this niche.

242

00:36:37.790 --> 00:36:40.300

Julie Betoni: Just curious how that's going to go over

243

00:36:41.180 --> 00:36:42.820

Julie Betoni: A.

244

00:36:45.440 --> 00:37:02.070

Stephanie Bogan: So I think. Actually, I don't know. I think you're cutting out a little bit. So Julie's question. So Julie is ha is has a general client base. She's now shifting to a niche. So you're going to be updating your website right? We can be marketing it to our existing clients, etc. I'm just wondering how that's going to go over because we don't plan

245

00:37:04.940 --> 00:37:11.100

Stephanie Bogan: right? I don't think Julie knows she's cutting out. That is Julie's question. So we're gonna She's on a little bit of a delay.

246

00:37:12.410 --> 00:37:20.770

Stephanie Bogan: Adam, do you want to talk about that? Because you have actually lived through that? So we you right. You're gonna kind of contain the right. The advice that we gave you in that same process.

247

00:37:20.820 --> 00:37:40.060

Adam Cmejla, CFP®: Yup, Yup! So the biggest thing that I can emphasize the importance of doing when you're messaging a different brand like this to a different subset to different audience is to emphasize the importance that your existing clients, and the level of experience and service that they've come to expect from you is not being compromised or jeopardized by you, making gift

248

00:37:40.060 --> 00:37:43.980

Adam Cmejla, CFP®: to go in a different direction. What I would also ask Julie, is.

249

00:37:44.300 --> 00:37:57.760

Adam Cmejla, CFP®: is the new level of service that they're rolling, even going to be applicable to the existing fines right when we rolled out the existing or the additional services for up met your private practice. Owners

250

00:37:58.450 --> 00:38:10.380

Adam Cmejla, CFP®: who cares? That's not services that they would have been interested in, because they're not. They don't want to not come back to practice. So there's a disconnect, or there's there's no disconnect in what we were doing. Because again.

251

00:38:10.630 --> 00:38:16.890

Adam Cmejla, CFP®: there's there wasn't alignment of service and value, I think again, just to iterate it again.

252

00:38:17.030 --> 00:38:27.960

Adam Cmejla, CFP®: Let your existing clients know what they're changing. The biggest thing that I realize from the surprise standpoint. is how much they embraced it, and how excited they were for me



253

00:38:28.270 --> 00:38:40.140

Adam Cmejla, CFP®: to make that decision and take the firm in some direction as long as I reassure them that we we're not changing the foundation Here we're just adding on right this wedding that we've talked about from the service.

254

00:38:42.190 --> 00:38:43.100

Stephanie Bogan: Awesome.

255

00:38:44.980 --> 00:38:48.230

Stephanie Bogan: all right. I don't know if Julie caught that, but it's on the recording, and

256

00:38:48.460 --> 00:39:08.220

Adam Cmejla, CFP®: I was gonna say that, did I? Did I did I see I saw someone drop out of frame like 10 s into my answer. So we are. What are we? 29 min into this conversation. So make a note to Julie to go back about the 2730, mark and and and listen to that answer.

257

00:39:08.440 --> 00:39:10.240

Stephanie Bogan: Awesome.

258

00:39:10.700 --> 00:39:15.350

Stephanie Bogan: All right. We're going to take one more question.

259

00:39:16.110 --> 00:39:21.110

Stephanie Bogan: can we? It's Christy. Can we stay on that topic for a minute.

260

00:39:22.490 --> 00:39:28.380

Christy: cause this is terrible. I'm i'm in the midst of doing this right now, right? And it's terrifying.

261

00:39:30.620 --> 00:39:35.320

Stephanie Bogan: What's the fear like? What's the story in your head like? What's the bad thing that's gonna happen?

262

00:39:36.060 --> 00:39:47.180

Christy: So the story in my head is like. Why am I doing this right like I have a great. I have a great business where all my clients are super happy.

263

00:39:48.090 --> 00:39:59.740

Christy: but I have this bug in my bonnet of like. Well, I have to have a niche because everyone says I have to have a niche, and so I need to have a niche, and if i'm going to have this niche, then I need to have the website that talks to the niche, and like

264

00:40:01.110 --> 00:40:03.880

Christy: I I feel like i'm unnecessarily

265

00:40:04.230 --> 00:40:21.570

Christy: rocking the boat. It's like the whole thing of like we have to go. R. I. A. Well, why do you have to go all right. Well, because all the cool kids are doing it like you. You got berries on the bush right here, and I know that that the



the forest on the other side of the mountain looks so appealing. But why would you beat the berries on the bush? So

266

00:40:21.570 --> 00:40:32.200

Stephanie Bogan: the fundamental question there is beyond behind the story. What is your underlying belief? Architecture around a niche like? Do you genuinely see the value do you want

267

00:40:32.400 --> 00:40:35.180

Stephanie Bogan: like because that fundamentally

268

00:40:35.640 --> 00:40:49.910

Stephanie Bogan: right if you don't really get it, and you're like, actually, i'm happy. And I don't need that. Let or want that level of optimization or deeper value or efficient specialization. Then okay, you don't have to have it. No one's making you right. That's the thing it's like. So now, like.

269

00:40:49.960 --> 00:40:55.020

Christy: I know that like the my, you know I have the the more and better that calls

270

00:40:55.120 --> 00:41:00.940

Christy: right, and it won't. Go away. It won't, shut up right like it, just

271

00:41:01.280 --> 00:41:18.970

Christy: but like, you know, and making this business case right like I think about like if I sat down with my husband, and I was like so like I kind of view it as like when I started my practice. You know, when I was 26 I joked that it was like when I was 26 years old. I joked that it was like the worst business proposition to make to my husband like.

272

00:41:19.520 --> 00:41:40.740

Christy: So I have this great, you know. I'm an employee at this great company I this great job that I love. I make really good money. and i'm gonna leave all of that and go make no money and take on a huge amount of stress and risk and liability for like a long time. But I like in a while I'll make a lot of money, and it'll be worth it

273

00:41:40.840 --> 00:41:55.430

Christy: right like it's like the worst business case that you can make, you know. in a lot of ways, and it feels like i'm doing that again. Now, with going into this niche right like where i'm saying

274

00:41:55.470 --> 00:42:03.220

Christy: and kind of putting it's. It's just my my My initial message was this is terrifying, and it's all this knees knocking stuff.

275

00:42:03.390 --> 00:42:05.560

Christy: and I feel like i'm

276

00:42:05.890 --> 00:42:18.600

Christy: i'm just having the sanity check of like. Am I really doing this like. Why do I really need to do this? And I think what you know what you're calling me on right now is saying like, you know, your purpose Kind of has to be greater than the pain.

277

00:42:19.300 --> 00:42:35.520

Stephanie Bogan: The why has to be bigger than the what if and so that's why, sometimes like that's the check in on



you. Don't want to move to a niche because Adam and Lauren and I am Jack like, hey? It's a great idea, very much to your point when you made that decision 10 years ago, or whatever it was to say, hey.

278

00:42:35.520 --> 00:42:55.070

Stephanie Bogan: i'm going to make this investment, because if I do this and I, you know I put in the effort right. 10 years from now I'm going to have this really great practice like you weren't like going off pi in the sky. You had relative examples to say right. This is likely the outcome. If i'm willing to do the work, and

279

00:42:55.070 --> 00:43:07.790

Stephanie Bogan: if we're lucky, we continue to have those kinds of leaps throughout our career going back to that relationship to money and success. Conversation about, remember, we start in survival, move to relief, achieve comfort.

280

00:43:08.220 --> 00:43:23.130

Stephanie Bogan: and then that next level is expansion. It doesn't mean we're an expansion all the time. We might hang out in comfort for a few years we might have some kids, and then we might wake up one day and be like we're gonna UN retire and go. Can you say that again? What's the per? It's

281

00:43:23.810 --> 00:43:41.980

Stephanie Bogan: relief. Come, what is it? Relief? Comfort: yeah. Before right? Fortunate right? Ask relief. There's a level of comfort. Like, okay, I can pay the ran, I have right. I'm saving some money. I have a nice lifestyle, maybe have an amazing lifestyle, and that next level is expansion.

282

00:43:42.420 --> 00:43:58.180

Stephanie Bogan: Personally and professionally. It might be that you go find passion projects with your free time. That's where you're going to invest that energy to create challenge and purpose. It might be family that you invest your time in right like Tanya. I You have done that. It might be

283

00:43:58.180 --> 00:44:12.310

Stephanie Bogan: right, taking the business to the next level, like Adam did like. Hey? Now I want it right. Invest that time to go through an expansion phase. You might be doing stuff, personally right? I'm: in a personal expansion phase like that's where a lot of my energy is going

284

00:44:12.750 --> 00:44:21.950

Stephanie Bogan: right. So our job is to just check in. Sometimes it' be like how my feeling. Is this a big leap that you're cause every big leap we don't. You have your knees knocking a little bit

285

00:44:22.040 --> 00:44:35.950

Stephanie Bogan: totally. I make it a big one, and then, like piece out, I got this. It's not a big start knocking so that got check of is this an aligned inspired action like that healthy knees knocking? Or is

286

00:44:35.950 --> 00:44:53.200

Stephanie Bogan: this your intuition being like, hey like? Let's pause and check in on whether niche is legitimately right for us like Don't? Just drink the Kool aid. Is there a business case and a life case that you feel like? Is that genuinely? What? Where more and better lives?

287

00:44:53.500 --> 00:45:05.870

Christy: Yeah. And I do feel aligned and inspired by this, and I think a big like Aha! That I had. I listen to Taylor and Michael Kitz is in office hours, and I listen to the replay of it.



288

00:45:05.920 --> 00:45:09.310

Christy: and it's the whole thing of around like a niche doesn't have to be.

289

00:45:09.570 --> 00:45:15.000

Stephanie Bogan: You know, a profession. It can be people that have the same pain points.

290

00:45:15.100 --> 00:45:30.810

Christy: you know, and that really resonated with me as i'm working. And I've like paid the big girl dollars, and I've hired the firm, and i'm doing like I know i'm not the right one to do this, you know, but still it still feel like right when you know, before you pull the trigger. You're kind of like.

291

00:45:30.830 --> 00:45:40.400

Christy: Are we really doing this, you know, because, like I've got, you know, like, why rock this boat. Do you want to tell everyone what you're shifting to, so that they're not just in mystery?

292

00:45:40.640 --> 00:45:43.600

Christy: So

293

00:45:43.620 --> 00:45:51.860

Christy: so we are. We have are doing our rebranding as being the financial planning firm for busy families with big dreams.

294

00:45:51.990 --> 00:46:00.650

Christy: and we have a 1 million dollar minimum. We charge 1.5 on the first 1 million. Our average client revenue right now is

295

00:46:00.990 --> 00:46:12.630

Christy: around like 12,000. We're gonna be, you know, moving that to 15 to 20 and kind of, and we're doing the one in one out model right now. So we're not looking to really grow and have this huge

296

00:46:12.760 --> 00:46:18.220

Christy: breath of impact. It's the depth of impact, and the goal is that our website

297

00:46:18.840 --> 00:46:24.690

Christy: turns away like 95 of people. But for those that come to it that they're like.

298

00:46:25.080 --> 00:46:28.930

Christy: Yes, yes, they're like. Where do I sign up?

299

00:46:31.320 --> 00:46:34.760

Stephanie Bogan: Adam is over here, just like I.

300

00:46:35.060 --> 00:46:35.880

Adam Cmejla, CFP®: Okay.

301

00:46:37.030 --> 00:46:40.520



Adam Cmejla, CFP®: how is that so much different than the current? The clients that you serve

302

00:46:41.020 --> 00:46:54.430

Christy: on our website. It is so, Adam, like we have a lot of. We have a lot of retirees that we love, that are like. I wish my passion was retirees.

303

00:46:54.500 --> 00:47:05.550

Christy: I wish that was my passion right, but and they're incredible like they're so much more. They're so profitable They're so nice. They're so easy right, and i'm like that's great. I want like

304

00:47:06.150 --> 00:47:20.580

Adam Cmejla, CFP®: I I find myself asking that question about once every other 2 weeks as well for the every now and then i'll. I'll talk to Kathy and Jonathan. Yes, working with retirees will be so much easier than trying to build this airplane as we.

305

00:47:20.920 --> 00:47:25.100

Adam Cmejla, CFP®: But it's in service of something, because

306

00:47:25.370 --> 00:47:32.010

Adam Cmejla, CFP®: I would get so for no offense. Everybody working with retirees. Okay, i'm not here to rain on your

307

00:47:32.180 --> 00:47:44.380

Adam Cmejla, CFP®: but I would, if I have to have one more social security, Max in question. I would want to put a modifiable and run it on like that. Just that, maybe a gross metaphor.

308

00:47:44.390 --> 00:47:50.600

Adam Cmejla, CFP®: But here again I go back to like by you making this shift. It's not compromising

309

00:47:50.620 --> 00:47:55.230

Adam Cmejla, CFP®: the experience of the conditions of what your existing Are you going to receive right?

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00:47:56.100 --> 00:48:05.080

Stephanie Bogan: No, it's not You're gonna You're gonna move people out, though. You said the one in one out right. That's what it will be. A slow transition. Given the growth rate

311

00:48:05.420 --> 00:48:13.890

Stephanie Bogan: right it will be. I don't wish you just unless you heard that up. Well, that's been been intentional, unless you decide to turn that up which you could certainly do.

312

00:48:14.180 --> 00:48:19.100

Christy: Yeah, I mean, in our so. And this is the other thing is that our web designer

313

00:48:19.240 --> 00:48:26.980

Christy: that's doing our copy and our marketing and our branding. She's like she is challenging me to put a apply to work with us. Yeah.

314



00:48:27.880 --> 00:48:28.880

Christy: And i'm like, okay.

315

00:48:29.580 --> 00:48:40.680

Stephanie Bogan: Do you remember when you were like? I have where prospects? What do I do? And I was like start. A waiting list to Adam was like, what now he's like turn on the waiting list. Boom like doesn't even think about it anymore.

316

00:48:40.680 --> 00:48:49.880

Adam Cmejla, CFP®: We we will Kathy: Well, Kathy, we'll get calls, and people will say, i'm just gonna let's say, is it really 7 weeks to do a trio call like.

317

00:48:50.330 --> 00:48:59.710

Adam Cmejla, CFP®: Yeah, it is, and working with medical professionals? I maybe there's a little bit more of an understanding, because if they have a patient that's not an urgency

318

00:48:59.960 --> 00:49:01.130

to the top

319

00:49:01.180 --> 00:49:08.910

Stephanie Bogan: right now, specialists in their area like they they know, so maybe there's a little bit more of an understanding. But we still get.

320

00:49:08.990 --> 00:49:18.660

Adam Cmejla, CFP®: And here's here's the last thing i'll say or not. The last thing i'll say but one little cherry on top of this conversation, and this is something that I had to get comfortable with as well.

321

00:49:20.690 --> 00:49:23.300

Adam Cmejla, CFP®: We are not as special as what we think we are.

322

00:49:23.910 --> 00:49:24.690

Christy: Yeah.

323

00:49:25.000 --> 00:49:29.260

Adam Cmejla, CFP®: as much as they love working with us. There is life beyond our relationship.

324

00:49:29.450 --> 00:49:34.550

Adam Cmejla, CFP®: and maybe that's not exactly related to your fear.

325

00:49:34.790 --> 00:49:41.140

Adam Cmejla, CFP®: But I experience that personally, by shifting or internally, if you will, by shipping clients over to John.

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00:49:41.180 --> 00:49:43.740

Adam Cmejla, CFP®: and then, just as we can to your clients out

327

00:49:43.750 --> 00:49:45.720



the better served by someone else, anyway.

328

00:49:46.430 --> 00:50:04.670

Stephanie Bogan: Yeah. And Christy, I think for you, you know directionally, it's just can you put a container around it, and come up with a conversation with clients that you feel good about the thing when we don't know how to, and explain. That helps us feel an integrity like. What are they going to think, or are they going to think? I've gotten too good for them, or they're going to leave me?

329

00:50:04.720 --> 00:50:16.110

Stephanie Bogan: Then we get below the line, and then we right. Then we hesitate to have the conversation. The conversation I'm sure there's a letter in the library somewhere, or a script. But the basic conversation is right. We've so enjoyed our

330

00:50:16.170 --> 00:50:36.110

Stephanie Bogan: But you know our relationship with you and Bob. It's been really great over the last few years. What we've noticed is maybe it's just where we are in life, and right where we are with our family. But right. The vast majority of our new clients are busy family with big dreams. So you're gonna notice that on the website some other places that's gonna start to shift. You don't need to worry about anything

331

00:50:36.110 --> 00:50:38.770

Stephanie Bogan: right. Everything is going to stay the same for you. It's

332

00:50:38.770 --> 00:51:00.360

Stephanie Bogan: right. This is just where we've really decided to focus and specialize our growth, because that's right, An audience that we really feel like we can deliver deep value to as always. If you have friends or family that have financial questions we can be. We want to be your first phone call. We're not the right fit. We'll give them some resources or point them in the right direction, right? So you just want to be like, hey? We're here. We're not pushing anybody away where you go to.

333

00:51:01.200 --> 00:51:02.610

Stephanie Bogan: and

334

00:51:02.830 --> 00:51:16.770

Stephanie Bogan: right, so the whole like. We've just been getting a lot of it sort of like, hey? The world is just coming at me, and I'm responding it's not like I'm kicking anybody out. It's I'm being selective because I have this great group of people that are coming in. So it's a much more

335

00:51:16.910 --> 00:51:28.930

Stephanie Bogan: above the line framing, and then it's just hey? Everything's gonna stay the same for you. And you're just gonna see like you know, things on the website, right? You'll see those updates. But outside of that everything's going to stay the same. No big deal

336

00:51:29.030 --> 00:51:31.270

Stephanie Bogan: you're

337

00:51:31.360 --> 00:51:57.640

Stephanie Bogan: but that's the thing is that I have to be careful about it right, because it may not say the same, because I might. 3 years from now I might end up graduating that client so like I need. I need to have that this is not a permanent tattoo. Christy like this. Isn't a for for business agreement, like every year you get to j like, Think about your business and decide. Do I want to make changes? So if it's not 6 months out, you're still, you know, like, if this is 2



or 3 years out right again unless you turn on that pipeline. It really is.

338

00:51:57.840 --> 00:52:13.100

Stephanie Bogan: You're absolutely okay to go back in 2 or 3 years and say, hey, you know what this. This busy family. Big things is really taken off, and we're gonna focus a 100 of our energy there. And the way we can best be of service to you is to prefer you to someone who specializes in working with retirees.

339

00:52:13.100 --> 00:52:23.380

Stephanie Bogan: because the way that we're going to right we really understand the issues. We're not going to be able to maintain that level of knowledge and proficiency on the retirement side. We want to send you over to Ethan because his firm rocks at that.

340

00:52:23.380 --> 00:52:34.820

Stephanie Bogan: and they're gonna be like Well, that sucks I love you so much. And because now you're not about me anymore. But now you have like handed me off to someone who is about me, and that feels kind of good.

341

00:52:34.960 --> 00:52:43.290

Christy: Yeah, no. I mean only minutes, 3, 3 min into this recording. Go back and listen to that. I can transcribe that because that is a perfect messaging to send out

342

00:52:43.350 --> 00:52:53.100

Adam Cmejla, CFP®: to clients when you're thinking about shifting, that was, and you can just insert we're shipping from playing to blank step. What you said there is is perfect.

343

00:52:53.210 --> 00:53:02.060

Stephanie Bogan: I bet, if we ask, we can get that transcribed, and make it a resource in the library, if it's not already, and then it's just as a point of reference.

377

01:02:18.380 --> 01:02:23.550

Stephanie Bogan: all right, did every but well, I guess you were all in my room. We could hang out there for just a little bit longer.

378

01:02:23.900 --> 01:02:28.550

Stephanie Bogan: That's right, Ethan. Do you want to talk through your questions since we since we're back?

379

01:02:29.340 --> 01:02:39.870

EthanBridgewater: Alright, I lost the chat from that room. Can you just share it with the group for us. Yeah. When we were at the March retreat

380

01:02:39.880 --> 01:02:57.740

EthanBridgewater: on the main stage at some point you were talking and it and it was an anecdote of a story where somebody approached him was like, hey, we need to generate X amount of new business or something in a short period of time, and so you help them kind of come up with like a 90 day sprint of like here. Just do these things, you know, focus on.

381

01:02:57.810 --> 01:03:12.330

EthanBridgewater: but that it was you didn't really expand on it. There. It was just a a lesson called I it's. I think it's called Marketing Kick start, Allison would know, and it's actually a lesson that we had Tiffany do



382

01:03:12.330 --> 01:03:27.770

Stephanie Bogan: to dive into that conversation and exercise. So Tiffany called me. If you all know Tiffany's story literally, it was like when we talk about how she called me crying. She had to choose between like underwear and socks for her kids like that's like she got paid largely on

383

01:03:27.770 --> 01:03:42.100

Stephanie Bogan: right revenue that she helped grow, and in spite of her 60 and 70 h work weeks, she was not growing, and she's like I don't have any more time. I can't like I cannot do any more, and I can't buy my kids both under where it's like this. Is it

384

01:03:42.910 --> 01:04:06.880

Stephanie Bogan: like that's enough. And so I was like, okay, here's the thing. If we work the plan, the plan will always work. This has just been my experience over right 20 or 30 years at this point the issue is, we've got to have a very simple, concise plan. This is not our 3 year runway plan right? That should be happening right? We're investing in building in our blog, or whatever it is. And then we need to really look at where the low lying fruit.

385

01:04:07.380 --> 01:04:20.380

Stephanie Bogan: Now we were talking about this early. It's some weird form of kismet. I don't know exactly when or how it works for some really cool quantum physics research around it. If you're in a like 0 point field or anything but basically you.

386

01:04:20.380 --> 01:04:30.580

Stephanie Bogan: if you are out there engaging in activities, making the phone calls doing the things that involve right people in humans not just hiding in your office. Writing blogs for days on end

387

01:04:30.910 --> 01:04:47.560

Stephanie Bogan: activity begets activity. So I ha so the idea is, what are the activities that you can do? I call them your 3 Rpa. So with Tiffany I said, step one is we've got to just really get our like our momentum going on that near term marketing right like the near term funnel.

388

01:04:47.560 --> 01:05:01.550

Stephanie Bogan: And that's usually things like referrals, social media, right like it's it's not like I'm gonna start a podcast and get clients next week. So one identify all of your potential near term channels. So if you imagine that branding wheel.

389

01:05:02.680 --> 01:05:11.820

Stephanie Bogan: Or now imagine the marketing wheel right like Here's the goal. Here's your big stuff, I right, whatever they are, My big Coi campaigns, my my blog, my

390

01:05:11.970 --> 01:05:23.730

Stephanie Bogan: I speak whatever you know, and then, like what are these near term things, is what you want to start to figure out like, Where can I generate? So clients obviously referrals are really obvious. Place

391

01:05:23.830 --> 01:05:29.910

Stephanie Bogan: Centers of influence are an obvious place, especially if you're doing any of that marketing

392

01:05:30.000 --> 01:05:44.590

Stephanie Bogan: right social media. You can get that gearing up pretty quickly if you especially if you've got a niche right, You can get those campaigns building, and it just takes somebody. They don't care if you've been there



for 6 years right? Just momentum. If someone clicks on those things

393

01:05:44.590 --> 01:05:57.810

Stephanie Bogan: and then, Ethan, we want to look at? Are these other things the appropriate feeders? And are we investing enough in them consistently, so that they start to push into this near term opportunity pool. Does that? Does that make sense?

394

01:05:59.280 --> 01:06:19.090

EthanBridgewater: Yeah, I think. And the reason we're doing the new website and rebranding is we having the text and counting practice? We used to get a lot of our new business from there, and we've we've drained that, and we're not actively growing the text and counting practice anymore, so that's gone. And then, after we kind of tap that we

395

01:06:19.230 --> 01:06:30.690

EthanBridgewater: utilize all of our kind of local and warm connections. And now it's how do we expand our circle, but not take 3 years to get a digital marketing plan rolling and stuff like that.

396

01:06:30.770 --> 01:06:40.800

EthanBridgewater: like i'm kinda my wife's putting her job at the end of May to take care of the new baby in July. And so it's like pressures on time to start making more money and

397

01:06:40.890 --> 01:06:44.490

Stephanie Bogan: totally get it. But those motivators are really compelling, Aren't. They?

398

01:06:44.810 --> 01:06:56.200

EthanBridgewater: Yeah. So step one, go. Watch that lesson on marketing. Rpas: the Tiffany did. So the idea is, you're gonna start every day doing 3 revenue producing activities.

399

01:06:56.210 --> 01:07:09.150

Stephanie Bogan: The more urgent, the more direct the activity, the less urgent right it can be writing the blog. But if you don't have a blog and then write a place to do it, then you gotta get all that geared up. That may or may not be where you want to spend your time.

400

01:07:09.330 --> 01:07:23.550

Stephanie Bogan: and then you want to look at Where again, in those current channels have you exhausted like? Have you gone back to those cois lately. Can you do a targeted campaign like? Is there something that's timely in the so you want to create need is essentially what you want to do

401

01:07:23.800 --> 01:07:38.420

Stephanie Bogan: right. So if you think about your cois, what something that's timely relevant. Are we coming up on a specific point with your clients where something needs to be done right. Can we create a need? Write a white paper record a quick video and be like, hey? This is our right.

402

01:07:38.430 --> 01:07:56.880

Stephanie Bogan: What you know value. Add on x, y or Z. We're seeing this alike. So we want to build out a drip like some kind of a campaign to really Well, right. It's that what we call upper out. We're really trying to apply a very focused amount of attention in a few places to see if we can really jump, start some activity there.

403

01:07:57.200 --> 01:08:03.300



Stephanie Bogan: So we want to look at centers of influence. Is there anything like what can we do to kind of create attention and need.

404

01:08:03.440 --> 01:08:19.649

Stephanie Bogan: We want to look at all of our other current channels like? Do we have any social going? If we have social going right, what some like, what's a campaign we can really work on, hey? If you have social media. By the way, follow Samantha Russell, and do everything that she says, because she's brilliant at it.

405

01:08:20.330 --> 01:08:24.970

Stephanie Bogan: She's with 20 over 10. It's like 30,000 followers.

406

01:08:26.010 --> 01:08:42.899

Stephanie Bogan: and she's constantly on there dripping value, telling you what to do, how to do it. And so there's some really great stuff there, but like with social, you should be commenting 5 times for every time that you post right. So revenue producing activity around social as you should be on there every day.

407

01:08:42.899 --> 01:08:53.399

Stephanie Bogan: commenting right and not just at 8 in the morning. So again Don't get stuck in there for 45 min, You then it's 15 min in the morning. Maybe it's 15 min in the afternoon 15 min at the end of the day.

408

01:08:54.340 --> 01:09:02.210

Stephanie Bogan: So you want to take half an hour an hour at the beginning of your day, and make sure that you do that for a couple of reasons. You've heard me say a lot how you start your day such a day.

409

01:09:02.580 --> 01:09:19.930

Stephanie Bogan: So we definitely want to start our day right. Both mindset and methods and moments, and we want all of that focused on growth, right? So that helps to turn that flywheel. And then we just wanna again pick up the phone and call people send emails like actual outreaches. So we can talk about that more in your one on one.

410

01:09:19.930 --> 01:09:27.680

Stephanie Bogan: But the idea is to look at the channels you already have find the low-lying fruit. How can you create awareness and need

411

01:09:27.740 --> 01:09:37.390

Stephanie Bogan: build a campaign? Write a white paper, go, do client interviews got. If you want to do a revenue, just go find all your top clients, go download the client, interview, guide.

412

01:09:37.390 --> 01:09:54.770

Stephanie Bogan: and then revenue, producing every day reach out to a couple. Make sure you've got right a couple of those a week. Same thing with your centers of influence, hey? We're really writing some white papers, and we're creating some videos on topics that are really relevant to our audience. We'd love to interview. You, take you to lunch, whatever like.

413

01:09:54.770 --> 01:10:07.660

Stephanie Bogan: I just kept you busy for like 90 days. Go back and watch the office hours, but we'll talk about that in your call. So watch the marketing Rpa's lesson. What can you do on social? What can you do with clients? What can you do with Cois? Are your most immediate

414

01:10:07.860 --> 01:10:12.960



Stephanie Bogan: points of contact, where you can flip the switch and actually generate activity with your activity.

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01:10:13.120 --> 01:10:23.350

Stephanie Bogan: Right? The blogs the pot right? There's just again. Once you've got it going, you might get drips along the way, and you will, and they'll pick up over time. But we're talking about near term right? How to kick it in the button 90 days.

416

01:10:24.330 --> 01:10:25.790

Stephanie Bogan: Does that help even?

417

01:10:26.150 --> 01:10:33.910

Stephanie Bogan: Yes, thank you.

418

01:10:34.950 --> 01:10:39.910

Adam Cmejla, CFP®: Nope. I think you hit on it. I mean it. It's the the thing that I keep going back to as far as

419

01:10:39.960 --> 01:10:49.010

Adam Cmejla, CFP®: first of all asking that fundamental question, that and so I would like to do that out, and then insert record, or, I should say, reconcile that with

420

01:10:49.030 --> 01:10:56.380

Adam Cmejla, CFP®: what Jim Jim Collins talks about and did the great, the hedgehog concept, just Google Jim Collins hedgehog concept.

421

01:10:56.720 --> 01:11:08.690

Adam Cmejla, CFP®: which is the intersection of regards. Your economic engine. What are you the best in the world at doing, and what you you passionate about? I think I got those 3 right and find your lane, and when I saw that it's like that for podcasting for me was just such a slammed down.

422

01:11:08.930 --> 01:11:10.890

Adam Cmejla, CFP®: Yes, lean into it.

423

01:11:11.200 --> 01:11:26.510

Stephanie Bogan: Yeah. So what balance? No different than clients. You got near term money and long term money right? You get near term efforts and long term efforts. So those long term efforts are great. And if you've got the runway and your pastor and Ramen, and keep investing there, if you're in that emerging or right really want to drive growth

424

01:11:26.740 --> 01:11:41.960

Stephanie Bogan: right, Rosanna Melissa, same right. That same conversation like those are the things you want to be doing to create that activity. And then again, we want to look at our marketing and our legion, our marketing legion, and our sales funnels. Right to make sure we're converting is all the right people that we can. So hopefully that helps.

425

01:11:42.020 --> 01:11:53.220

Stephanie Bogan: Adam asked a question in the chat earlier that we use a lot in coaching right? Those series of 3 questions, right? What's it in service of what's at the cost of but the first question, and that is what I want to end with today.

426



01:11:53.250 --> 01:12:05.570

Stephanie Bogan: Promptly on time, I think at 1 min to go, which is the number One question you can always ask yourself when you're not on track right? You're not feeling clear focused right. You're just in any way above the line is

427

01:12:06.680 --> 01:12:14.920

Stephanie Bogan: how, by feeling like that's your power. Question how my feeling like what's going on right? We've talked about. That. Is it like? Just start there?

428

01:12:14.990 --> 01:12:19.730

Stephanie Bogan: The power question for your brain is, what am I solving for?

429

01:12:21.130 --> 01:12:32.100

Stephanie Bogan: If I am uncomfortable, or i'm procrastinating? I'm not solving for procrastinating. That's the lie we tell ourselves. You know how to do stuff when you're committed to doing it when the motivation and the vision of line you will do it every time.

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01:12:32.890 --> 01:12:41.620

Stephanie Bogan: What I've been solving for. Well, I feel overwhelmed, and i'm solving for the fact that I haven't taken that next step. Why haven't I taken that next step? What do I need to solve? For? Oh.

431

01:12:41.740 --> 01:12:49.120

Stephanie Bogan: I have to put my niche on my website, and i'm not comfortable having that conversation with clients, and I need to solve for that, because that reservation is showing up. Okay.

432

01:12:49.270 --> 01:12:51.010

Stephanie Bogan: what's my next best step.

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01:12:52.490 --> 01:12:59.330

Stephanie Bogan: and the cool thing about being in limitless is, if you don't know you have more than one place like office hours. Practice calls tribe

434

01:12:59.350 --> 01:13:09.490

Stephanie Bogan: right. You literally are no more than minutes away from letting someone know that there's awareness and need and right getting help to support you through that. So what am I feeling?

435

01:13:11.200 --> 01:13:12.620

How's it shown up

436

01:13:14.870 --> 01:13:20.670

Stephanie Bogan: with that reflection. What is it that you're solving for this year, this quarter this week.

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01:13:20.910 --> 01:13:31.330

Stephanie Bogan: this day? So between now and our next call, as you as we end. Reflect on what is the biggest lever that you're going to move in. Q. 2 post retreat as you do your Q 2. Planning.

438

01:13:32.110 --> 01:13:45.980

Stephanie Bogan: What's the biggest lever you can pull. And as you look at that lever, how are you feeling about it? What do you need to solve for what is solving it in service of like what is doing it in service, of what is solving in



service of.

439

01:13:46.290 --> 01:13:48.650

Stephanie Bogan: and what is it at the cost of

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01:13:49.620 --> 01:14:05.500

Stephanie Bogan: right? The cost is, i'm going to have to let go of this believe, for the cost is, i'm going to have to right. Be willing to lose a couple of clients through the cost is. and but the cost really is that I can't do my more and better. So i'm really saying it, Kristy, i'm going to sit here and do this exact kind of work for the next 30 years.

441

01:14:06.150 --> 01:14:15.710

Stephanie Bogan: and I know when I say that Christy's a little heart on the inside goes. No, that's not a line like when I put it that way, don't you instantly go. Yeah, there's no way.

442

01:14:16.240 --> 01:14:35.070

Stephanie Bogan: That's why I walked away. I was like. Everything is great, and the idea of doing it for 30 years doesn't feel good. and that you should not. I should not feel that things should not be this great, and I should not feel that it's like I should be jumping over the moon about this. Something is a mess here. Now you don't have to check it all moved to custody. But if you want to, I highly recommend it

443

01:14:35.070 --> 01:14:50.160

Stephanie Bogan: back at Plan B join limitless. We could do it here, and then you could use all your save time and money to go to Costa Rica or anywhere else in the world you want. So this week, Adam, I, Jackie Lauren, and the entire team are here to help you drive an office hours. Figure out how you're feeling.

444

01:14:50.160 --> 01:15:05.980

Stephanie Bogan: and what you're solving for. And when you do those 2 things, ladies and gentlemen, you tend to build a wildly successful practice in a life that you love, it's a really great habit to pick up with that. We'll let you go, Adam, Jacky Lauren Allison, Everyone else thanks so much for joining us today. You guys go forth.

445

01:15:05.980 --> 01:15:11.000

Stephanie Bogan: Do great things. Remember the only limit you have are the ones that you place on yourself. Everyone have a great week.

