

# NEWS & EVENTS

- ☑ May 8, 1:00–2:00 PT: Practice Office Hours
- ☑ May 15, 9:00–10:30 PT: 6 Mindsets of Excellent Executives (Coaching Call)
- ☑ May 15, 1:00–2:00 PT: Mindset Call w/ Coach Liz
- ☑ May 22, 11:30–1:00 PT: Kick Start Marketing w/ Tiffany  
Chat GPT with Jarrod, John & Adam  
Book Club - Ask: How to Relate to Anyone
- ☑ May 22, 1:00–2:00 PT: Practice Office Hours w/ Coach Lauren

 NOTE: NO CALLS on June 19<sup>th</sup> or July 3<sup>rd</sup> due to Holidays

## FOR TODAY'S CALL

- **Worksheets**
  - Resources will be dropped in the chat when we get to the activity portions of the call



# LIFESTYLE COACHING CALL

May 1, 2023

## Managing People, Priorities & Projects



STEPHANIE  
BOGAN



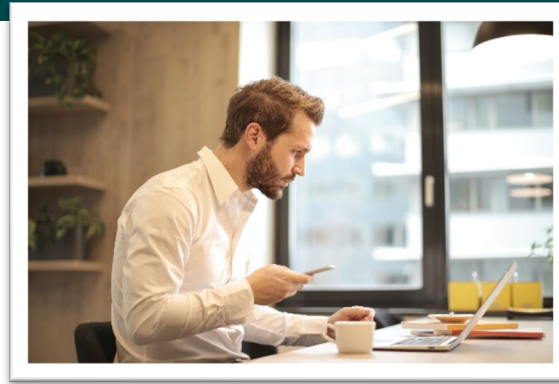
TIFFANY  
CHARLES

## MANAGING PEOPLE



1. Gaining Investment
2. Letting Others Drive
3. Ownership Attitude

## MANAGING PRIORITIES



1. Setting Clear Priorities
2. Aligning Resources
3. Managing Capacity

## MANAGING PROJECTS

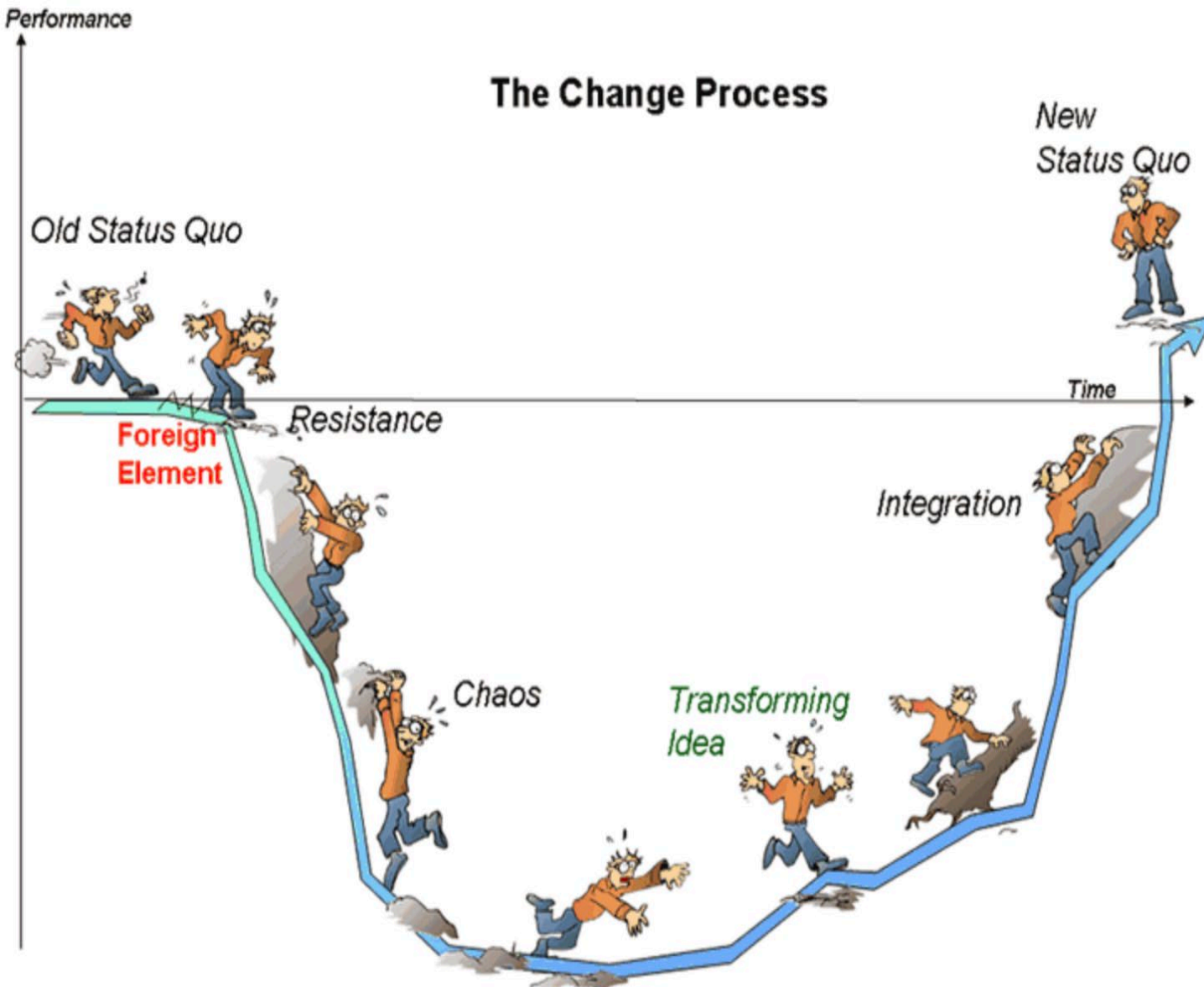


1. Gaining Investment
2. Scoping Projects
3. Managing Projects

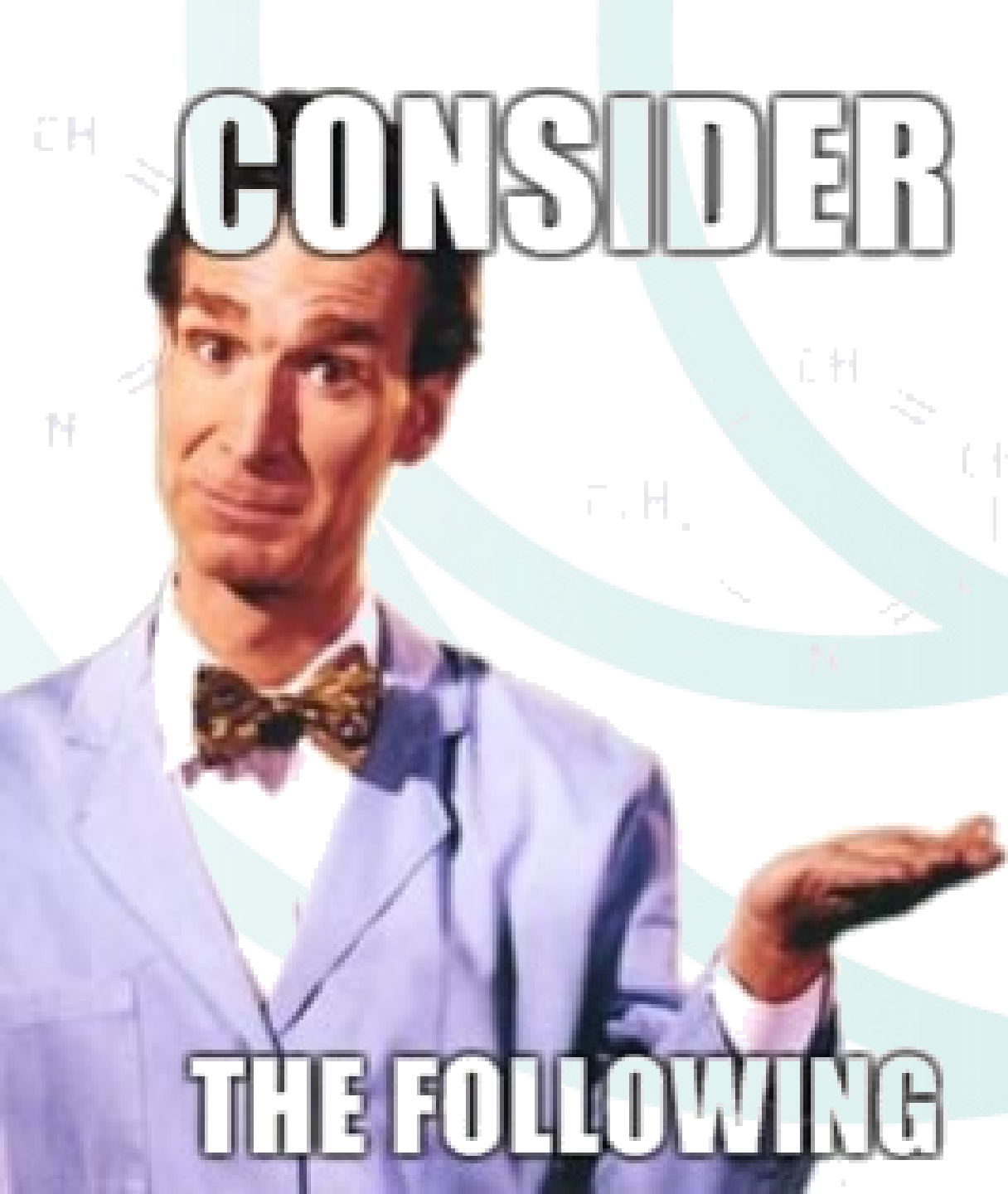
A CANDID CONVERSATION ABOUT HOW TO SET AND MANAGE CHANGE IN YOUR PRACTICE

## SATIR CHANGE MANAGEMENT METHODOLOGY

## BRIDGES TRANSITION METHODOLOGY



- 1** Ending, losing, and letting go—For many people, the first reaction to change is a resistance marked by fear and discomfort.
- 2** The neutral zone—When the change is starting to take place, people will be stuck between letting go of the old status quo and welcoming the new.
- 3** The new beginning—Finally, if handled well, once the new change is in place people will enter the stage of acceptance and comfort with the new way of doing things.



**CONSIDER**

**C**LARITY

**T**RANSPARENCY

**A**CCOUNTABILITY

There's a Call To Action in All Change Models

**THE FOLLOWING**

+ Add task ○ Incomplete tasks ≡ Filter ↕ Sort ⊞ Customize ⋮

Task name	Purpose	Assignee	Due date	Complete
<b>THIS WEEK'S AGENDA</b>				
Meals & Entertainment <span>2</span> <span>10</span>		Nicole Simpson		
Off agenda planning <span>&lt; September</span> <span>3</span> <span>1</span>		Lisa Vander	Aug 4	
[MTG] 2022 Launch Plan Kickoff: Team <span>1</span>	Share	stephanie.bogan	Tomorrow 9:00pm	On track
Tribe Talk 2021 Schedule <span>30</span> <span>26</span>		Allison Foulk		On track
Weekly Wins/Opportunities	Share			
New Program-Ops-GSD meeting model <span>1</span>	Solve	stephanie.bogan		
Add task...				
<b>PROGRAM: BIGS</b>				
08.25 Summer Success Series (BIG) <span>3</span>		stephanie.bogan	Aug 25	On track
2022 Lifestyle Program (BIG) <span>1</span>	Share	stephanie.bogan	Today	On track
2022 Leaders Program (BIG) <span>1</span> <span>3</span>		stephanie.bogan	Today	On track
2022 Alumni-Community Offer (BIG) <span>1</span>		stephanie.bogan	Today	On track
2022 Member Site Build (BIG) <span>9</span> <span>5</span>		Nicole Simpson	Nov 12	On track
2021 September Retreat (BIG) <span>2</span>		stephanie.bogan	May 17 – Oct 1	On track
Add task...				

**Breakdowns Brief**

Dependencies Add dependencies

Purpose —

Status —

Complete —

Priority —

Purpose —

Description

**BREAKDOWNS BRIEF**  
A list of breakdowns to discuss, define and deal with.

**Key Business Principles:**

- There is a model (system/process/way) for everything.
- If it's not in the system, it doesn't exist.
- Consistency matters.
- Keep it as simple as possible.
- Misses happen; keep missing the same thing that's learning/fability.
- Capturing key breakdowns below so we can learn and level up as we go.

2021 Marketing Calendar HELP SHARE AUTOMATIONS

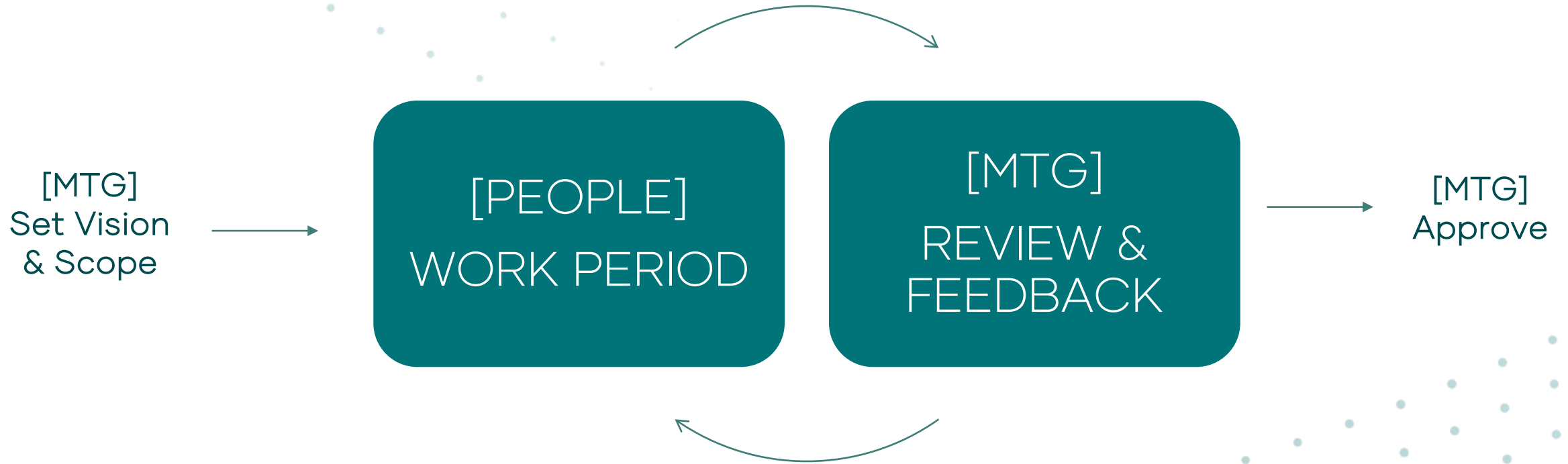
Sort Color Share view

A # of Times... Status Channels Type Copy Image Campaign

9:00am	5	Approved	Twitter	Social	Delivering good advice should skyrocket your growth not stall you out...		CFP Campaign		
11:30am	3	Approved	LinkedIn	Social	Delivering good advice should skyrocket your growth not stall you out...		CFP Campaign		
9:00am		Approved	Twitter	Social	Ready to define, differentiate & deliver deep value to clients in a hyper-efficient way while specializing your services and scaling your growth? ...		CFP Campaign		
12:00pm		Approved	LinkedIn	Social	The rise of advice is ushering in a gold rush of growth... ...a geyser you can tap to build a high-growth, high service, high satisfaction ...		CFP Campaign		
9:15am		Approved	Twitter	Social	Only 2 days to go. Harness the value of advice to build a high growth, high service, high profit, ...		CFP Campaign		
11:15am	3	Approved	LinkedIn	Social	Interested in learning how to harness the value of advice, become a truly Trusted Advisor and build a high growth, high service, high happiness ...		CFP Campaign		
7	Promote CFP Webinar	7/20/2021	11:00am	Approved	Twitter	Social	Free Webinar tomw. Sharing the thinking and tactics I've used to help drive rapid growth and stellar NPS scores at some of the ...		CFP Campaign
8	Promote CFP Webinar	7/20/2021	11:44am	Approved	LinkedIn	Social	You might want to catch this tomorrow... Interested in learning how to harness the value of advice, become a truly ...		CFP Campaign

# COLLABORATIVE CHANGE PROCESS

SIMPLE OR SOPHISTICATED: CHOOSE THE MODEL THAT SUITS YOUR STYLE AND SITUATION



# Pick a Project & Complete your Project Plan

## LET'S GO TO BREAKOUTS

1. IDENTIFY A PRIORITY AND CREATE A PROJECT PLAN
2. TAKE 5 MINUTES TO ROUGH DRAFT
3. ROUNDTABLE WITH GROUP FOR CLARITY ON:
  - Purpose
  - Outcome
  - Success Metrics
  - *How you will manage you and/or your team*

**ON PURPOSE PROJECT PLANNING**

PROJECT IDEA CLARITY	Project/Focus	What is the outcome you want to achieve?		
	OUTCOME			
IMPACT	How does this project make a difference?	What's possible with success?	What's cost of inaction/compromise?	
TRANSPARENCY	START:	END:	TOP 3 OBJECTIVES:	
	OWNER:	BUDGET:		1
	KEY MILESTONES:			2
			3	
	SKILLS/RESOURCES/NEEDS:		MOTIVATION/REWARDS:	
ACCOUNTABILITY	SUCCESS METRICS:			
PROJECT OWNER:		DATE:		



# SUPPLEMENTAL LESSONS

TO SUPPORT EFFECTIVE CHANGE



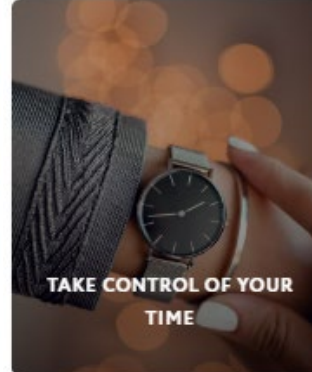
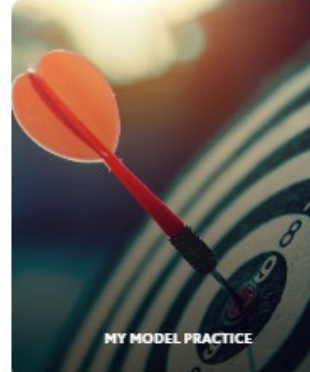
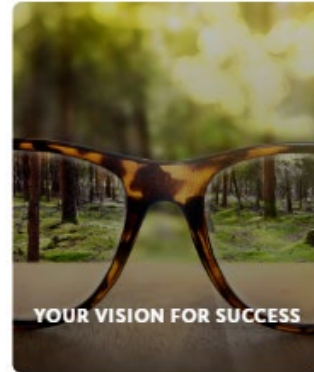
## PEOPLE LIMITLESS LESSONS



- Rock Star Right Hand
- Building & Managing Teams



## PRIORITIES LIMITLESS LESSONS



- Your Vision for Success
- My Model Practice
- Take Control of Your Time



## PROJECTS LIMITLESS LESSONS



- Action & Accountability
- Managing People, Projects & Priorities



LIMITLESS Q&A

# SHOW AND TELL

