LIMITLESS Coaching Call Transcript

JUNE 12TH, 2023
OPTIMIZING OPERATIONS TO BUILD A HYPER-EFFICIENT FIRM

WEBVTT

00:23:07.000 --> 00:23:12.000
That Lun video in the in the workforce step, so that hey?

00:23:12.000 --> 00:23:15.000
When Kate comes on board our new hire that's starting this week when she comes on board, and we want her to know how to do something.

00:23:15.000 --> 00:23:21.000
She can just click the link to the loom video that's in the workflow step.

00:23:21.000 --> 00:23:26.000
And right there is is her training process, those 2 tools in of themselves.

00:23:26.000 --> 00:23:33.000
Your Crm. And utilizing room is a great way to begin building your opts. You're not gonna do this overnight.

00:23:33.000 --> 00:23:35.000
It's not gonna be done in a week, or a month, or even 6 months.

00:23:35.000 --> 00:23:47.000
But she's going away at it is what gives you that opportunity to again say it a number of times to institutionalize the knowledge that you have in in the way in which you do your your firm.

00:23:47.000 --> 00:24:03.000
Again, this is a ready fire. Aim! Approach. This is something where you execute on the vision, on the intention that you have, and you measure progress, and then you read, you know you reign reengage ready, fire, right execute, and then evaluate.

00:24:03.000 --> 00:24:04.000
So it's not perfection. It's not going to be perfect. On the first time.

00:24:04.000 --> 00:24:11.000
Just ask yourself a question, what needs to be done differently in order to solve for that?

00:24:11.000 --> 00:24:16.000
Again. We've got resources within, limitless. Within the library there.

00:24:16.000 --> 00:24:29.000
I wanna make sure that I have that we have a couple of questions here that I get, that I have time to go through all of those oops and get a little

help myself a little bit here and let me make sure that I get through questions here.

00:24:29.000 --> 00:24:35.000
So, starting from the bottom how do you keep up with new tech software without getting distracted by the shiny new toy?

00:24:35.000 --> 00:24:38.000
I have heard of my new tech here, limitless than anywhere else.

00:24:38.000 --> 00:24:42.000
Good question. Paul.

00:24:42.000 --> 00:24:49.000
Kind of like the news. I don't look forward unless I have a problem, or unless I need it, to get information.

00:24:49.000 --> 00:24:53.000
So it kind of comes down to one of those periodic things that we'll look at.

00:24:53.000 --> 00:24:57.000
I won't look for a tech solution unless we've identified a problem so many times.

00:24:57.000 --> 00:25:06.000
I think advisors buy tech looking for a problem when it should be the other way around, identify the problem and then find tech as a solution to that problem.

00:25:06.000 --> 00:25:14.000
So kind of back. What I mentioned earlier. Take inventory of the way in which you're doing things and ask yourself, is there a better mouse trap that's built out there that can save me time?

00:25:14.000 --> 00:25:21.000
While at the same time providing a better client experience right client, better experience, and client service, if you can.

00:25:21.000 --> 00:25:25.000
If you so right, what am I solving for in service?

00:25:25.000 --> 00:25:29.000
Of what end of the cost of what? So if you start with, what am I solving for?

00:25:29.000 --> 00:25:30.000
That can be the guide to help you figure out what is the next piece?

00:25:30.000 --> 00:25:36.000
What kind of tech can I use for doing that as far as where to find that tech again?

00:25:36.000 --> 00:25:39.000
I go back, to the kitchens heap. That's a good starting point.

00:25:39.000 --> 00:25:40.000
Ask advisors and limitless what we're using.

00:25:40.000 --> 00:25:42.000
Other cohorts. Linkedin. There's post questions out there, Fin Twitter depending on where?

00:25:42.000 --> 00:25:55.000
Where you compartmentalize some of your social media time there's a couple of different way, a couple of places that you can, that you can look.

00:25:55.000 --> 00:26:04.000
Let's see thoughts about managing client. I'm not sure which border they're going in here, but.

00:26:04.000 --> 00:26:11.000
Oh, sorry! Someone's approving them thoughts about managing client tasks and firm project tasks in separate systems.

00:26:11.000 --> 00:26:14.000
I have struggled, having different types of tasks in different systems.

00:26:14.000 --> 00:26:28.000
So Sarah. Good question. We just drew the line that if it's client service related, it's in the business it's in retail if it's on the business, it's in Asana, we the reason we do that is because we have probably half a dozen different vendors that I work

00:26:28.000 --> 00:26:37.000
with on client or on a project firm, related issues that are not client-specific, and I don't want some I don't want those individuals having access to client data.

00:26:37.000 --> 00:26:44.000
So that's why we keep a for that, because it's easy to add third-party contractors be an email address to a specific project.

00:26:44.000 --> 00:26:48.000
And then, when they're done, I can kick them out and just do it easy that way.

00:26:48.000 --> 00:27:04.000
So that's why I like having to having 2 separate systems, and then everything that is client related is directly inside of Red Tail in the Crm so hopefully that answers your question a little bit more.

00:27:04.000 --> 00:27:05.000
Yeah.

00:27:05.000 --> 00:27:09.000
Hey! Hey, Adam! What about when? Like the tasks that clients themselves need to complete?

00:27:09.000 --> 00:27:12.000

And therefore need to be incessantly reminded of.

00:27:12.000 --> 00:27:17.000
Everything goes any money as of now. Our current status is, everything goes.

00:27:17.000 --> 00:27:18.000
Any money we have thought about using something like nudge KNUD GE.

00:27:18.000 --> 00:27:26.000
No, the founders of that of that Dave and Sean.

00:27:26.000 --> 00:27:31.000
Now the founders of that company. Well, they've done a phenomenal job with that we currently just use e-money.

00:27:31.000 --> 00:27:34.000
I've thought about doing Asana boards and things like that.

00:27:34.000 --> 00:27:43.000
I know, talk to 10 different advisors, get 11 different theories and opinions on how impact, what is what I think we have found with red Tail.

00:27:43.000 --> 00:27:51.000
Excuse me with Emani is the same thing would be appl applicable if we use Asana Trello Monday, click it.

00:27:51.000 --> 00:27:57.000
You'll have some clients at love it, and you have other clients that it doesn't matter what platform you use.

00:27:57.000 --> 00:28:01.000
They're just not gonna play ball. And so we we track that in.

00:28:01.000 --> 00:28:07.000
So for us, we've made the decision that e-money as a now serves as that parking lot for the client tasks.

00:28:07.000 --> 00:28:13.000
And then, as we're providing clients services, we're doing plan updates, we can go in there and use that as a follow-up to determine having any progress on it, do we need to follow up.

00:28:13.000 --> 00:28:19.000
Do me help with anything, etc.

00:28:19.000 --> 00:28:22.000
So!

00:28:22.000 --> 00:28:23.000
Do you share files a solution for clients to upload documents?

00:28:23.000 --> 00:28:32.000
Yes, that is the only solution that we use. Can a toolbar be added to a website for client access? Kevin?

00:28:32.000 --> 00:28:41.000
I'm not sure what you mean by Toolbar. We do have a client login or a client corner, if you will, on our website, where, when clients think we do?

00:28:41.000 --> 00:28:45.000
Yeah. Clients. Yeah, secure file transfer.

00:28:45.000 --> 00:28:51.000
If you go to integrated pdwm.com, client, login, secure file transfer that takes you directly to our share. File.

00:28:51.000 --> 00:28:57.000
We have a dedicated clients user for share file, so that clients don't send files to me.

00:28:57.000 --> 00:28:59.000
Clients don't send files to John. They don't send files to John.

00:28:59.000 --> 00:29:00.000
They don't send files to Kathy. They send files to clients that one user in share file, that his clients and we all see that information.

00:29:00.000 --> 00:29:15.000
We all have access to that user, that ensures that the left hand iss what the right hand is doing in the firm, so that a client doesn't send something that Kathy's waiting.

00:29:15.000 --> 00:29:17.000
But they send me email to John's inbox.

00:29:17.000 --> 00:29:21.000
And now Kathy can't get it, because it's in John's share file folder.

00:29:21.000 --> 00:29:29.000
So, clients. That's again a one of the many, many, many, many benefits of utilizing a client.

00:29:29.000 --> 00:29:36.000
Central inbox for email communications, because the benefit of doing that is unlimited.

00:29:36.000 --> 00:29:40.000
Clients, service, app, firm name, or clients at firm name.

00:29:40.000 --> 00:29:45.000
That can be the username for share file and for acuity and for I don't know half a dozen other pieces.

00:29:45.000 --> 00:29:52.000
Of when we use that in that we all as user, as firm owners.

00:29:52.000 --> 00:29:58.000
As as firm team members. We all have access to that username.

00:29:58.000 --> 00:30:05.000
Let's see here.

00:30:05.000 --> 00:30:08.000
Have you added anything to tech stack in the past year?

00:30:08.000 --> 00:30:13.000
I'll setetch youpt. Should I just realize that we're over on time, aren't we?

00:30:13.000 --> 00:30:15.000
You're okay. Autumn. We have lunch now, so we can answer these questions.

00:30:15.000 --> 00:30:21.000
Okay. Okay. Have you edited anything? Your tech stack in the past year outside of Chat Gpt.

00:30:21.000 --> 00:30:40.000
To help with either the customer experience or firm efficiency jat form is something that we've used because of its security to help to help gather some information, so that Kathy can seamlessly populate financial plan engagements and like we combined our financial plan engagement and

00:30:40.000 --> 00:30:47.000
Investment Management Agreement into one document. And so we use dot form as a way to help gather that information also for our mid.

00:30:47.000 --> 00:30:54.000
Our beginning of the year goal setting and mid year client goal review appointments.

00:30:54.000 --> 00:31:01.000
We built jot form to help systematically gather some of that data by sending out Java form links to clients.

00:31:01.000 --> 00:31:06.000
I'm toying and looking at, using fireflies as an auto-not taker.

00:31:06.000 --> 00:31:07.000
I've seen a couple of fathom participants here in limitless.

00:31:07.000 --> 00:31:12.000
So seems like some other people are using some note taking services within their zoom as a way to gather an organize conversations from Zoom.

00:31:12.000 --> 00:31:30.000
Fireflies, has similar capabilities way too early for me to give an opinion or a verdict on the efficiency on that end.

00:31:30.000 --> 00:31:36.000
I'm trying to think if there's anything else that we are using.

00:31:36.000 --> 00:31:42.000
Scrolling through my other monitor here, I think that's it. Not really.

00:31:42.000 --> 00:31:45.000
We haven't changed a whole lot.

00:31:45.000 --> 00:31:51.000
Please explain how you use Asana or travel. How does it save time and add value?

00:31:51.000 --> 00:31:59.000
Well, Kevin, as far as adding value, is nothing client facing it's it's a way for us to collaborate independently.

00:31:59.000 --> 00:32:03.000
So like I've managed the 2020, 20 podcast in Asana.

00:32:03.000 --> 00:32:10.000
Once I'm done recording an episode, and I paying my producer and I assigned the due date of that episode.

00:32:10.000 --> 00:32:26.000
I never touched that episode again, so he now knows, by virtue of the due date and the order of the episodes that I've dragged where the episode, when it gets released and the show notes are in there, and everything like that same thing from a content standpoint it's where I organize my

00:32:26.000 --> 00:32:34.000
thoughts for writing our plan, life on purpose, Newsletter, that I send out on a monthly basis so I've got different sections for the different sections of the Newsletter in Asana.

00:32:34.000 --> 00:32:38.000
So I don't know that necessarily I mean, yeah, I'm sure it does save me time.

00:32:38.000 --> 00:32:51.000
If anything it saves insanity. It gives me a place to dump all my ideas, because, in the absence of that, if you have to keep all that in your head like, that's an incredibly inefficient use and stressful way to try and keep all your information straight so Asana your

00:32:51.000 --> 00:32:56.000
Crm, it's what allows me to peace of mind to know that I don't have to remember everything.

00:32:56.000 --> 00:33:05.000
It just goes into a system, and then I can take very easily the next person that's going to be working on that project, whether it's someone on my team or my podcast.

00:33:05.000 --> 00:33:09.000
Producer, or my webinar designer, or my virtual assistant in the Philippines.

00:33:09.000 --> 00:33:10.000
That's working on a couple of projects for me right now.

00:33:10.000 --> 00:33:20.000
Like. That's the knowledge transfer that exists when your when you're using a tool like assign or Trello to help source that so does that answer your question? Or is there?

00:33:20.000 --> 00:33:27.000
If you have any additional thoughts, questions behind that, feel free to unmute and ask.

00:33:27.000 --> 00:33:35.000
No, I think so. I just. I've heard of it, but I never understood exactly what it does, and so just wanted to get to where that value to the practice is.

00:33:35.000 --> 00:33:42.000
Yeah, it's project management tool. It's a it gets everything out of here and allows you to get that information down to the team.

00:33:42.000 --> 00:33:43.000
Yup, Jon is a fault to my last question.

00:33:43.000 --> 00:33:45.000
Thank you.

00:33:45.000 --> 00:33:50.000
Is there anything you removed from your tech tech stack in the past year that you realized wasn't adding value.

00:33:50.000 --> 00:33:57.000
Good question.

00:33:57.000 --> 00:34:00.000
I don't think so.

00:34:00.000 --> 00:34:04.000
Trying to think of our I don't think so. I think it's pretty.

00:34:04.000 --> 00:34:16.000
It's been pretty dialed in for a while, which I like, but I don't like, because I'm like, we'd be doing better right which is why we're looking at things like Firefly as a way to better capture and save time.

00:34:16.000 --> 00:34:26.000
Right if we if we can get that to a point and systematize the process, change the system away and a little bit more, so that we can get rid of dictation where we have to.

00:34:26.000 --> 00:34:41.000
If there's anybody on here from Mobile Assistant my apologies but changing landscape is, if we don't have to pick up our phone and dictate and then wait for a dictation and spend that time doing it.

00:34:41.000 --> 00:34:44.000
If fireflies can do that for us and create a summary.

00:34:44.000 --> 00:34:53.000
Fred is the moniker, the avatar inside of fireflies, that is the Chat Gpt integration.

00:34:53.000 --> 00:34:58.000
So, whenever whenever a note comes in from fireflies, I can ask Fred fire, Fred, please provide me a meeting summary of this meeting.

00:34:58.000 --> 00:35:07.000
Along with all action items from everybody that was in attendance, and I typed that right.

00:35:07.000 --> 00:35:08.000
And of course you know me. That'll soon be a text expander.

00:35:08.000 --> 00:35:14.000
Because why type? The same thing over and over again I could use a Texas banner to do it.

00:35:14.000 --> 00:35:19.000
And so when that happens, then in about 30 Si get the meeting summary.

00:35:19.000 --> 00:35:27.000
So what we're testing is is firefly is going to be smart enough to not miss any action items.

00:35:27.000 --> 00:35:32.000
So we're working on a way in which we can kind of how do we quality assurance? How do we?

00:35:32.000 --> 00:35:39.000
Qq. See that process in a relatively time. Efficient manner.

00:35:39.000 --> 00:35:46.000
Stay tuned, I'll let you know. Let's see, I've been trying to keep an eye on chat, and I think there's been a couple of questions.

00:35:46.000 --> 00:35:49.000
Adam. Jeff. Jeff has a question.

00:35:49.000 --> 00:35:51.000
Yeah. Go ahead. Joe.

00:35:51.000 --> 00:35:58.000
So, Adam, you you had talked for a little while about dumping your full planning software and swap it over to elements.

00:35:58.000 --> 00:36:01.000
Where? Where are you? Add on that.

00:36:01.000 --> 00:36:05.000
Love elements. It wasn't ready for maintime or for mainstream.

00:36:05.000 --> 00:36:09.000

So we are making that as an offering inside of the 2020 money membership, so elements to their credit says it's not financial planning.

00:36:09.000 --> 00:36:15.000
Software. It's financial monitoring, software, semantics.

00:36:15.000 --> 00:36:23.000
I don't know marketing so, but what we found is that.

00:36:23.000 --> 00:36:38.000
Maybe we are wrong in this, but it's the decision that we made at this point is that there's still value in the work and the value and I think maybe you can take a victory lap here, Jeff, because this was a Pdf a point of discussion that we had when I

00:36:38.000 --> 00:36:48.000
first made that announcement that we found that we were missing some value in the actual nuts and bolts, and or the actual IP that what am I trying to say?

00:36:48.000 --> 00:36:54.000
The data that traditional financial planning software can compute and present to us.

00:36:54.000 --> 00:37:04.000
Marshall us, not necessarily through the client, but more so to us, was missing, and so we're looking at elements, as essentially we're branding it copilot in.

00:37:04.000 --> 00:37:07.000
It's either co-pilot or guided independence. I'm not sure which branding we're going to go with.

00:37:07.000 --> 00:37:21.000
Inside of the 2020 money membership. But if you want the guided independence, slash, co-pilot relationship, you'll get access to the elements monitoring app as part of your membership in 2020.

00:37:21.000 --> 00:37:23.000
Yeah, I think. And that's kind of where I ended on.

00:37:23.000 --> 00:37:28.000
It, too, was like I was not ready to let go of that grudge of the full planning software.

00:37:28.000 --> 00:37:29.000
Yeah.

00:37:29.000 --> 00:37:34.000
But I'm interested in it, even though I do see like a couple of drawbacks, and how they calculate some stuff.

00:37:34.000 --> 00:37:35.000
But yeah, so thanks. I appreciate it.

00:37:35.000 --> 00:37:44.000
Yeah, yeah. And the last point that that we found as we got into it, a little bit more was come back to the question about task management follow-up, like we.

00:37:44.000 --> 00:37:48.000
That was, that was while it's clunky, and it's certainly not perfect.

00:37:48.000 --> 00:37:53.000
That was an important piece of utilizing e-money, was putting notes that you know.

00:37:53.000 --> 00:38:00.000
This is what we asked client to do. This is what they're going to work on, whether we're the one crossing enough down the line of the client is one crossing off down the line.

00:38:00.000 --> 00:38:05.000
We want some place for client. Follow tasks to live, and e-money didn't, or excuse me.

00:38:05.000 --> 00:38:11.000
Elements doesn't have that at all right now. So that meant okay, so we're gonna do Asana and build out client boards.

00:38:11.000 --> 00:38:12.000
Are we gonna do nudge, and add another piece of tech, and it's like scroll.

00:38:12.000 --> 00:38:18.000
Just work with what we have right now.

00:38:18.000 --> 00:38:22.000
Okay. Adam, Michelle has a question, and then Rosario, and then we'll probably wrap after those 2.

00:38:22.000 --> 00:38:23.000
Okay.

00:38:23.000 --> 00:38:27.000
And let's see see any I missed.

00:38:27.000 --> 00:38:28.000
Sounds good.

00:38:28.000 --> 00:38:38.000
And I raise my hand for Methews. Question on the security of otter and fireflies and all these, how do you get comfortable with using this?

00:38:38.000 --> 00:38:43.000
So Otter, and this is a a credit to Tiffany and Jared.

00:38:43.000 --> 00:38:54.000
They started to do a lot of due diligence in Ottawa, wasn't willing to answer their very basic questions about how they protect client

information and the aggregation of that data, so that did not meet their tests so that's why we're not using either either

00:38:54.000 --> 00:38:57.000
fireflies has been pretty transparent in that.

00:38:57.000 --> 00:39:02.000
The way I look at it, and maybe this is the wrong way to think about it.

00:39:02.000 --> 00:39:08.000
We're using dictation software already with with mobile assistant.

00:39:08.000 --> 00:39:09.000
We've been using that for years. It's another human being.

00:39:09.000 --> 00:39:18.000
Listening to notes that we're dictating about clients, and that information.

00:39:18.000 --> 00:39:23.000
Hi I don't know why I just the data is out there.

00:39:23.000 --> 00:39:37.000
The notes and the information that we're taking is I don't know why I feel better about a bot getting it than hearing. It's not that I don't feel comfortable with mobile assistant taking those notes I mean, we've been using them for a better part of 4 years.

00:39:37.000 --> 00:39:41.000
But the data is in red tail. The data's in Orion.

00:39:41.000 --> 00:39:48.000
The data's in Td, the data's in, like the incredible digital footprint that everybody already has.

00:39:48.000 --> 00:39:51.000
Maybe this is just me surrendering and waving the white flag.

00:39:51.000 --> 00:39:56.000
But nothing's private.

00:39:56.000 --> 00:40:03.000
So, yeah, maybe not. The best thing to say. But I, to the extent that we've been able to go through the security policy with fireflies.

00:40:03.000 --> 00:40:11.000
It checks a little bit of a better box in what odor than what honor was.

00:40:11.000 --> 00:40:15.000
Alright! Was there one more?

00:40:15.000 --> 00:40:24.000
Yes. Let's see, Rosario had one. How let's see.

00:40:24.000 --> 00:40:25.000

Oh, Rizario and Darren. Okay, did I think?

00:40:25.000 --> 00:40:40.000
You answered, how do you something about hybrid? A virtual assistant overseas? And then, Darren, how do you use Evernote, compared to Asana?

00:40:40.000 --> 00:40:41.000
Oh, I'm assuming there's a word missing.

00:40:41.000 --> 00:40:42.000
What was the part of the virtual assistant overseas?

00:40:42.000 --> 00:40:43.000
Maybe. How do you feel about hiring a virtual assistant overseas?

00:40:43.000 --> 00:40:46.000
Yeah, how do you feel about that?

00:40:46.000 --> 00:40:48.000
Great.

00:40:48.000 --> 00:40:49.000
Great.

00:40:49.000 --> 00:40:53.000
Other. You go. How do you go about it? You know, especially about, you know, security. All that stuff.

00:40:53.000 --> 00:40:57.000
They're not working on anything. Client related. It's all on the firm.

00:40:57.000 --> 00:41:02.000
So they so one of the last projects that they were working on there's some legislation that's floating around different State legislators.

00:41:02.000 --> 00:41:17.000
There's some legislation floating around different State legislatures around optometrist being able to practice the full scope of their license, and whether they can even call themselves doctors, it just got shot down in florida so I had her go and research, which states are doing

00:41:17.000 --> 00:41:23.000
that work and find me the bill numbers and the contact information for each different legislature and build me an email campaign.

00:41:23.000 --> 00:41:27.000
Now she, I don't know if she did, or if I use chat to build the email campaign.

00:41:27.000 --> 00:41:32.000
But she got all the information it's things like that that that I'm using perfect.

00:41:32.000 --> 00:41:34.000
It's nothing client related.

00:41:34.000 --> 00:41:37.000
And how do you find somebody? How do you find somebody?

00:41:37.000 --> 00:41:42.000
That is, you know, will understand what we do.

00:41:42.000 --> 00:41:45.000
Well, she didn't need to know. We do for something like that.

00:41:45.000 --> 00:41:49.000
So that's a very clear. This is so.

00:41:49.000 --> 00:41:57.000
I'll give a tool outside of limitless that that has been phenomenal as it pertains to outlining the scope of the work that you're doing for a project.

00:41:57.000 --> 00:42:04.000
And then hiring the person for that project. It's Dan Sullivan, founder, strategic Coach.

00:42:04.000 --> 00:42:08.000
Just go to strategic coach and download the impact filter.

00:42:08.000 --> 00:42:13.000
The impact filter. I keep a copy of them right here.

00:42:13.000 --> 00:42:20.000
They are, standard operating procedure for me. Anything that I have that I need to get down on paper and create the scope of work.

00:42:20.000 --> 00:42:36.000
I can do an impact filter in 15 min, and that gives whoever I'm hiring whoever I'm outsourcing that to a great great visualization of what I'm solving for, how I define success resources to use what the ideal outcome is why we're doing this the

00:42:36.000 --> 00:42:43.000
worst result, etc. So yeah, as it pertains to that specific person that I'm using over in the Philippines, it's very easy.

00:42:43.000 --> 00:42:45.000
It's like they don't need to know the financial service business.

00:42:45.000 --> 00:42:47.000
It's incumbent upon me to do a good job of delegating the project, and how I define success in the project.

00:42:47.000 --> 00:42:57.000
Does that make sense?

00:42:57.000 --> 00:42:58.000
Okay.

00:42:58.000 --> 00:43:02.000
Yes, thank you. And so you mentioned dance all over, and this is a process.

00:43:02.000 --> 00:43:10.000
Dan Sullivan created something called the impact filter. It's one of his tools that he uses inside of strategic coach he's very protective about his IP.

00:43:10.000 --> 00:43:13.000
So I wanna make sure, especially in a recorded line, that I'm giving full facing credit.

00:43:13.000 --> 00:43:16.000
And it is his tool. Property of strategic coach.

00:43:16.000 --> 00:43:17.000
But the only way that you can get that is by is by going to the strategic goat website.

00:43:17.000 --> 00:43:25.000
And downloading it from there. That is not something that we can put inside of limitless library.

00:43:25.000 --> 00:43:27.000
That's not something that we will email out to you.

00:43:27.000 --> 00:43:40.000
That is exclusive content of strategic coach.

00:43:40.000 --> 00:43:41.000
Let's see here.

00:43:41.000 --> 00:43:47.000
Okay, let's just answer Kevin's real quick dictating into word.

00:43:47.000 --> 00:43:50.000
What am I missing? Not using a digitalation service? And then we'll wrap up.

00:43:50.000 --> 00:44:02.000
Probably nothing, probably nothing as long, I mean, you know, a lot of it's been a while since we've used education service like we're like, we're to try and oop.

00:44:02.000 --> 00:44:03.000
Yes.

00:44:03.000 --> 00:44:05.000
Can you hear me? My air pods have been going all day, and I've got done.

00:44:05.000 --> 00:44:06.000
I'm at that point of cycling back and forth between left and right.

00:44:06.000 --> 00:44:16.000

So let me make sure that I still have a charge. There we go.

00:44:16.000 --> 00:44:33.000
Okay word. Not being able to like in the beginning, when I was doing that, I would find that we were spending just as much time cleaning up a dictation like I would dictate it, and then have to spend time cleaning up the word document, and I didn't want to do that i'd rather just

00:44:33.000 --> 00:44:37.000
dictate it and have someone else make sure that 40.

00:44:37.000 --> 00:44:41.000
One K was done correctly, or that you know the different.

00:44:41.000 --> 00:44:45.000
A financial verbiage and nomenclature that we use.

00:44:45.000 --> 00:44:55.000
That word would actually understand that. So maybe that dictation has come a long way since then, as it relates to what we have now with AI.

00:44:55.000 --> 00:45:14.000
I like the idea of not just utilizing notes, but being able to summarize and create very succinct action items based off of those notes so it's gonna be a long process to figure out how we can use the combination of chat and something like firefies whether

00:45:14.000 --> 00:45:32.000
it's fireflies, or some other substitute, or some other, because in an ideal situation, and this is where integrations and having someone that understands integrations, work and ideal situation with the technology that exists, you would have meeting notes automatically be summarized after a client conversation by something

00:45:32.000 --> 00:45:42.000
like chat integrated with firefights. Then through a zap, through Zapier, automatically connect that client appointment that was booked through acuity, which has a specific account appointment.

00:45:42.000 --> 00:45:43.000
Id where an action item came in. As a result of that appointment which was connected to a client contact record.

00:45:43.000 --> 00:45:53.000
Then you would have the action items created as tasks within the Crm that that entire loop would close.

00:45:53.000 --> 00:45:54.000
Is it possible? Yes, how accurate is the data going to be?

00:45:54.000 --> 00:46:04.000
Stay tuned. That's what we're solving for.

00:46:04.000 --> 00:46:21.000

Because now that removes caffee from having to wait for notes that removes John from having to dictate notes that read moves tapping from having to clean up notes and have action items go into the Crm where now, as a team Cathy John Kate.

00:46:21.000 --> 00:46:28.000
They can just do the work instead of having to gather the data and do the and get the tasks into the Crm.

00:46:28.000 --> 00:46:35.000
If the tasks automatically showed up. That's the end goal that we're solving for.