

# LIMITLESS Coaching Call Transcript

October 16th, 2023  
Personal Development Coaching Call  
Creating Clarity

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00:15:57.130 --> 00:16:06.940

Stephanie Bogan: Good morning again. Everyone we are gonna cover our October call, which we decided, we're gonna focus on creating clarity. We do this a couple of times a year.

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00:16:06.960 --> 00:16:24.470

Stephanie Bogan: Limitless has a lot of of courses coaching community context. As you know, you're constantly working through them, as we often talk about right? It's about getting clear, getting focused and right getting to work on the things that will move the needle and consistently moving forward right? Because consistency compounds.

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00:16:24.470 --> 00:16:39.189

Stephanie Bogan: So every few months we just like to check in and give you some opportunities to deep dive in areas where you might need some more help or support. So we like to call these meet you where you are calls. So we're gonna really go through. I can make the

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00:16:39.960 --> 00:16:41.500

Stephanie Bogan: do. I have control.

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00:16:41.550 --> 00:16:52.030

Stephanie Bogan: Yeah. Do I not have control today? Oh, no. Hit me on a tight timer. I set my timer. I have 6 min left. You know. I love my egg timer ladies and gentlemen

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00:16:52.030 --> 00:17:15.970

Stephanie Bogan: so we're gonna cover 4 distinct areas today. We're each each coach on the team. I think one of the really cool things about moment list is that you have a multitude of coaches. None of us is as smart as all of us, and I would get tired of listening to me all the time. We've just got some really talented, capable committed people. So love having calls, we can bring everyone together and really support you as a coaching team.

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00:17:16.349 --> 00:17:28.989

Stephanie Bogan: I'm gonna talk about vision and goals. Tis, gonna talk about marketing clarity. Natalie is gonna talk about team building, and Liz is gonna talk about right being good enough and personal worthiness right? The number one disease on the planet, by the way, is not enoughness.

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00:17:29.060 --> 00:17:33.409

Stephanie Bogan: So let's start with a little bit on vision goals and where to focus



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00:17:34.090 --> 00:18:01.699

Stephanie Bogan: the biggest challenge that you will have in limitless, certainly, but outside of limitless. If you're enacting a lot of change as Tiffany right pre working with us. She was overwhelmed. She was not getting enough done. It wasn't a limitless problem. It was a how is she managing her vision, clarity and focus as an advisor and a leader, because you're all, both an advisor and a leader, right? Working in and on.

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00:18:01.760 --> 00:18:11.019

Stephanie Bogan: So it's really important that we make decisions that we have our thought, habits or behavior, habits on our business habits, all grounded in

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00:18:11.050 --> 00:18:24.110

Stephanie Bogan: clear and conscious mindset and state. so that we can align our decisions, our time, our energy, our capital people and rate investments of cash

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00:18:24.270 --> 00:18:28.470

Stephanie Bogan: in things that most efficiently align with our goals.

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00:18:28.690 --> 00:19:05.150

Stephanie Bogan: We cannot, if we you know you've heard me say 1,000 times. If you've been here more than 3 days, when the vision is clear, the decisions are easy. and I don't know about you. If you've had one of those moments where you were really stuck on something, and then you've got that moment of clarity as to what or why, and you got that accelerator effect on the back end where you're like. Wow! That now I get it. And it all like niches are that for a lot of people it starts to fall into place, and you're like, Oh, now I see how my sales process am I on boarding? And like Oh, I get it! But like you were staring at the wall. This is invisible force field for weeks or months.

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00:19:05.570 --> 00:19:16.720

Stephanie Bogan: anytime that you feel stuck stalled out, or that you're moving slower than you want. That is your first and most important clue that you must stop. pause.

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00:19:16.730 --> 00:19:18.160

Stephanie Bogan: reflect.

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00:19:18.480 --> 00:19:47.849

Stephanie Bogan: take personal inventory. What's happening? What's happening? Really right? Am I overwhelmed because I'm making 4 choices, and I'm not, you know, being effective. And I'm not, you know I got off the time habits, and I'm like or you know. Have I taken on too much? Have I brought on? Do I? Do I need to look at my client profitability analysis, and recognize that I'm doing too much for team like I might need to look at fees or niches, or something else right like we. Our brains love to keep us in the swirly wheel

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00:19:48.040 --> 00:19:54.150

Stephanie Bogan: of procrastination. You know. Procrastination, distraction don't know how. So we put it off



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00:19:54.590 --> 00:20:13.000

Stephanie Bogan: right. Those are all strategies. They're not real ladies and gentlemen. They are literally stories that your brain is using behind the curtain to keep you from getting clear, getting focused and engaging because the status call, if nothing else is safe. You might not like it. You might be what I'd love to call uncomfortably comfortable

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00:20:13.040 --> 00:20:34.350

Stephanie Bogan: where you don't love everything about what's happening in your business or your life, but somehow you tolerate it, and your attitude is right. I'll try Hardering, and push through. That is not how we are intended to move through life. I still have days, sometimes weeks, where I get into the zone of efforted action like you're always managing vision, clarity and focus always.

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00:20:34.510 --> 00:20:47.339

Stephanie Bogan: but like going to the gym and working out. You get better and better and better at it. I like, I catch myself. And I'm like, Oh, wow! I've just been really pushing through. I haven't had those pauses. I haven't taken those breaths had a good, really good day.

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00:20:47.540 --> 00:20:59.209

Stephanie Bogan: but my great days there, when I am clear on. Look at my vision and goals in the morning. Right, my post. It's my mantras, my reminders. You guys hear me talk about like I get myself in a super positive state

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00:20:59.440 --> 00:21:06.430

Stephanie Bogan: and listen to stuff that pumps me up. I try to get outside. I get really clear on my day. What's my intent for the day.

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00:21:06.780 --> 00:21:27.479

Stephanie Bogan: Look at my goals once a week, right like constantly using my vision and goals as a beacon, and and I'm keeping myself super aware of them, the more aware you are right. Think of why do they put all the goodies next to the checkout stand at the grocery store, or all the sugary, expensive cereals right at eye level.

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00:21:28.120 --> 00:21:45.830

Stephanie Bogan: right? Because what your brain sees is what it pays attention to what you focus on expands. If you get stuck in the grind of the day to day, you're feeling a bit overwhelmed. The task is tsunami, and you've got some limitless stuff and you're not hyper. Clear on what you're working on now or next. And why, stop.

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00:21:46.220 --> 00:21:56.649

Stephanie Bogan: take the inventory. This is the real work. You do this as a person and leader, and you own your life. It is where you literally say, what's happening, really?

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00:21:56.930 --> 00:21:59.069

Stephanie Bogan: What do I need to account for?



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00:21:59.310 --> 00:22:24.949

Stephanie Bogan: Is it personal? You got 4 Co. We got practice coaches. We got mindset. We got more mindset coaches than anyone else, one to 4 like it's cause it's awesome, right? So that's our work is to make sure that we're clear on what our priorities are. Quarterly is a good track. If you're just going from project to project, which is a great way to go through, limitless in the simplest form. When one project is done, you sit down and you ask yourself what's next. If you don't know.

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00:22:24.950 --> 00:22:38.680

Stephanie Bogan: You go to tribe. You go to inbox, you show up to an office hours, and you say, Hey, Steph, hey, Nat, hey, Liz, hey, tiff. Here's where I'm at. I just wrap this, or I'm looking at my next quarter, and I'm trying to figure out what's next. And I promise you.

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00:22:38.850 --> 00:22:47.880

Stephanie Bogan: within like 10 min any of us is gonna be like, oh, what about X? Or here are 3 options which one feels more important to you right now

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00:22:48.260 --> 00:23:07.899

Stephanie Bogan: the job is to be aware, so that you can take appropriate action to correct course. Our habit is to work over those feelings. Those feelings are there to tell you something's not right. It's not an integrity with who you are in the practice in life you want. It needs to be tended to.

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00:23:08.190 --> 00:23:18.310

Stephanie Bogan: We are just really good at working over our feelings. I'll just work a little harder. I'll check email a couple times cause I'll get my dopamine hit and feel really productive. But at the end of the day of the week or the month.

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00:23:18.350 --> 00:23:30.969

Stephanie Bogan: if you feel it, you don't feel energized and empowered, and like you're executing in the way that you want. So we've all had windows where we are. There the job now is to do the work to train your brain brain hacks

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00:23:31.350 --> 00:23:43.580

Stephanie Bogan: to get into that zone more of the time, and that's why the vision and the clarity Friday check ins with yourself or your mastermind. Right? We've got to maintain that awareness and then have a process

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00:23:43.820 --> 00:24:03.120

Stephanie Bogan: for taking inventory and asking yourself what's next, even if what's next is asking for help, and if you do that consistently, you will always excel over time, because it's inevitable that if you do the right work it will show up over time, because, as we all know from the markets, consistency compounds.

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00:24:03.650 --> 00:24:13.519

Stephanie Bogan: So this is really just a reminder that getting clear getting focused and getting to work isn't just a cool slogan that we like to say it's a working model



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Stephanie Bogan: and a blueprint for success. Get clear. What am I working on now? And why is it really highly aligned with my goals? Design it with your the practice you want in mind, not the stories that are shrinking you.

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00:24:25.470 --> 00:24:54.619

Stephanie Bogan: What do I need to focus on to get it done. And then is it in my calendar and on my schedule? Otherwise it doesn't really exist. It's a wish that you'll get to tomorrow, and we all know that tomorrow or tomorrow land is the place where 99% of our human potential lies right? We do not want to live in tomorrow land, so I'll stop there because we've got some other great coaches and conversations. But when we break out into rooms, if you want help getting clear, getting focused or getting to work on the right priorities. Then you can see me in breakout room.

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00:24:55.360 --> 00:24:58.369

Stephanie Bogan: whatever Alison says. I won't say number one because I could.

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00:24:58.540 --> 00:25:16.609

Tiffany Charles: Well, that I'm gonna be talking about marketing clarity today. And I think a quote that I think about. I'm I'm pretty sure it's Renee Brown, but it's as simple, as like clear, as kind unclear, as unkind. And

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00:25:16.610 --> 00:25:39.909

Tiffany Charles: it's just so simple. And I feel like I've experienced so much in marketing around. How unkind unclear can be, and costly marketing is a place that we invest dollars and time in a pretty big way like. So we're actively budgeting on it. Looking through it. We're trying to have measuring sticks. And

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Tiffany Charles: then you pick a strategy. And you're like, okay, measuring stick? Did we get the number of clients that we want? But did we actually implement the strategy to its fullest? And not only that, but marketing. There's so many strategies. And so it's like, Am I looking for the tip of the sphere right like, how do I even get people to come, am I? But I can't keep them coming if I'm not nurturing that bottom funnel of that. And and then how do we get that to actually have higher levels of

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Tiffany Charles: conversion. And so there's just so many aspects of marketing. And sometimes that's where we freeze and get stuck.

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Tiffany Charles: And today, those are conversations that I wanna have like, where are you at in your marketing journey? How are you feeling? What strategy are you working towards? How many strategies are you working towards? How is time, energy, and capital? Associated with that?

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00:26:34.880 --> 00:26:46.730

Tiffany Charles: What are your measuring points? How long are you giving yourself? Those are things, too. People think marketing is magic, and we often get there. We're like we want, like



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Tiffany Charles: I did it. I put out my first blog. Where are the clients? And it doesn't work that way. It takes a level of, you know, discipline, and endurance and and and predictability comes when you continue to implement and so those are all things that I'm I wanna discuss. And then certainly, if there is time and opportunity we can jump into some of those strategies and how to get unstuck and take that next best step.

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00:27:16.720 --> 00:27:22.619

Tiffany Charles: But marketing, while it's serious process and discipline, and

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Tiffany Charles: all those things. It's kinda unsexy behind the scenes, man, when it comes together. It is sexy and fun, and we enjoy those pieces. If we can maintain the the discipline and the discomfort that comes with just implementing these marketing strategies. And the clarity piece is really really important. Who are you serving. Where are they at?

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00:27:46.770 --> 00:27:50.499

Tiffany Charles: What are your, you know? Are are you?

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00:27:50.640 --> 00:28:13.280

Tiffany Charles: I know people have asked like a hundred like, I'm more traditional marketing, and I'm not digital. And like we can, we can explore that like, why are you labeling yourself in those ways? And 2, what if you know it? One strategy works well for you. We can. We can look into those things. So I'm here today to just help you take your next best step as clear as possible from a marketing perspective.

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Tiffany Charles: As we're in these are other things. We'll oftentimes think like great starting this January first, and I have, like a

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Tiffany Charles: 3 new clients need to come in by March, but we're starting our marketing January first, right? And so when you start looking into that, what's that real timeframe of? Okay? When should I expect those clients to come in based off of the strategies that I'm doing? There's some that service more short term. There's others that are gonna be a more long term play. And so we just wanna feel clear to those measuring sticks and what that looks like, so that we feel aligned with it, and continue to have

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00:28:51.500 --> 00:29:07.969

Tiffany Charles: the grit and grind that sometimes goes with just the marketing and the discipline to continue with the strategies that we choose to give it the adequate time and refinement that the strategy may need in order to work. There's a lot of

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Tiffany Charles: I've I've we've run at destiny capital, a lot of different strategies definitely on both on traditional and digital and there are times where I'm like, let's just scrap it. And I'm like, what if we there's data points to be like? Oh, if we just tweaked that that now is the shift, and we've now seen that 3 or 4



times through different strategies we put in place.

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Tiffany Charles: So here to help you think about how do you set up? Q. 4 to set up the next year. Set clear expectations for yourself. Timelines, good data measurements. And then, of course, like the strategies and mindsets around marketing. How you're labeling yourself and the work that you're doing and how you build trust with the clients that you wanna build trust with.

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00:29:59.290 --> 00:30:01.739

Tiffany Charles: Thanks. Yeah, thanks.

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00:30:04.090 --> 00:30:07.059

Allison Foulk: Alright. Next up we have Natalie.

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00:30:07.280 --> 00:30:10.819

Natalie Bergsma: Hey? Everybody good to see you?

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00:30:11.010 --> 00:30:17.289

Natalie Bergsma: So I'm actually gonna share a couple of things. I think a while back. You probably got an email from limitless

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00:30:17.560 --> 00:30:23.520

Natalie Bergsma: asking for your help, surveying your teams right? Like there are so many

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Natalie Bergsma: advisor surveys, right? You know. What's your vision? What's going on? How is the business running? And we never really asked the teams. The people who are on the ground day to day

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00:30:32.770 --> 00:30:34.090

Natalie Bergsma: doing the work.

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Natalie Bergsma: What's really going on? How do you feel about leadership? So when we started thinking about, how do we build better leaders? The first question we had is.

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00:30:43.860 --> 00:31:02.689

Natalie Bergsma: well, what's the what's the insight that we can glean from team? So I'm gonna share just a couple of highlights. The whole focus on this is as you grow the business. Whether or not you're a lifestyle solo, and you only wanna have one or maybe 2 team members. But you still have a team, you still have to support them and grow them, develop them.

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00:31:02.700 --> 00:31:29.919

Natalie Bergsma: Or if you're looking to move past that, to become, you know, a small giant or an ensemble right? There's more structure in place that you have to put there. But at the end of day I think



there's there's some common themes that we've pulled out. The first one I wanna share is like, we all have a lot of challenges right now. We we survey team members and ask like, When are you planning to leave your organization? And 25 to 36% of people said within the next 2 years?

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Natalie Bergsma: Right? So some are like tomorrow. Some are in the next year, right? But if that's

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Natalie Bergsma: a quarter of your team is planning to leave in the next few years like, Hey, we really wanna know? How do we keep people? How do we engage them? How do we make them happy? And I think we've all experienced managing next generation teams. Right as we age, we bring in younger people into the business. That's way different. The expectations around culture and what you share and don't share and working hours and remote ability, like all of those things.

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00:32:02.680 --> 00:32:07.270

Natalie Bergsma: are different, we add on top of that. hiring is hard.

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00:32:07.750 --> 00:32:21.290

Natalie Bergsma: right finding the right people to fit. Your firm who are gonna stick with you is hard, and then we don't always have the time and capacity. Right? So it means bringing in the right kinds of people. What we kind of think of as a players

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00:32:21.370 --> 00:32:35.940

Natalie Bergsma: is really critical. But I think one of the things we wanted to talk about is what really is an a player, and I think the traditional sense of like, Hey, I need someone who can do it all right. That's what a stands for a stands for all, everything.

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Natalie Bergsma: and I see that fail time and time again, because you can't have someone who does it all, or it takes you anywhere from one to 2 years to find that kind of unicorn

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00:32:46.370 --> 00:32:52.300

Natalie Bergsma: in the business. I know I've done it. Hey, Allison, how are you to day? But here's the thing

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Natalie Bergsma: we asked teams to rate themselves on things like, how inspired and motivated are you? How do you feel? Value? How do you enjoy doing your work? Do you feel like you do your best work?

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00:33:05.150 --> 00:33:11.650

Natalie Bergsma: Are you willing to go above and beyond and on a scale of one to 5 teams rated themselves at 4 and above

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00:33:12.410 --> 00:33:32.529

Natalie Bergsma: right. But when we asked about things like clarity, are you clear on what your role is? Do you have a documented position. Do you know how to grow in your organization? Right? Do you know, are you getting the training and mentorship that you need results? Drop down to a 3. Right? So

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00:33:32.730 --> 00:33:36.570

Natalie Bergsma: average. Right? So

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00:33:36.770 --> 00:33:52.819

Natalie Bergsma: where is the the disconnect? Because I talk to advisees all the time. And they're like, Hey, I feel like my team could do better. They're working hard enough like, how come they're not as motivated as they should be. That's not what teams are saying. Teams are saying like, Hey, we're willing to do it. We wanna do the work.

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00:33:53.500 --> 00:34:00.969

Natalie Bergsma: but we lack clarity. We don't know how right, because we're not entrepreneurs when you're an advisor and entrepreneur. You know how to grow

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00:34:01.050 --> 00:34:04.799

Natalie Bergsma: right. Go do that next thing. Figure out how to market right? Go

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00:34:04.880 --> 00:34:15.329

Natalie Bergsma: figure out how to define our services. The figuring out is the hard part. But you intuitively know, like, Hey, in order to grow, I have to go do these things in staff. We often see

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00:34:15.659 --> 00:34:25.080

Natalie Bergsma: support roles, right? Someone helped me figure out how to do these things. And that's really that big disconnect. So

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00:34:25.100 --> 00:34:41.869

Natalie Bergsma: one of the things that I love from the survey that we found is I think Steph and I always joke we. We had a client like 1520 years ago. We walked into the room, and we asked the team like, Well, what's the vision for the organization? And they were like, we don't know. And the advisor had said.

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00:34:42.110 --> 00:34:51.919

Natalie Bergsma: why would they need to know that? So the good news is is that's changed like, 80% of teams are like, yeah, we got, we got the vision. Okay, we know where we're going.

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00:34:53.000 --> 00:34:56.329

Natalie Bergsma: But they weren't clear on how it impacted them.

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00:34:57.030 --> 00:34:58.970

Natalie Bergsma: They were like, Okay, that's great.

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00:34:59.220 --> 00:35:14.289

Natalie Bergsma: Now, what? How does that impact me. How is this a value to me? So as we think about building teams and leadership, it's really, how do we create clarity for our teams. And here's the most important part. How

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00:35:14.460 --> 00:35:29.499

Natalie Bergsma: do we become better leaders? It's not so much about the structure, although there's lots of things that we can talk about. So if you have questions about, how do I structure compensation? How do I define rules like those are all really important things. But what's almost as important

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00:35:29.680 --> 00:35:38.689

Natalie Bergsma: is, how do I actually be a better leader to my team? How do I identify what it is that they need

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00:35:39.810 --> 00:36:00.940

Natalie Bergsma: to do? Better to get better to grow. And how do I identify that in my organization? What is my organization need from a team perspective? Right? That's all about leadership and being a better manager, and I think one of the things that I've often experienced with advisors. The thing I hear most often we start talking about Hr. Is.

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00:36:01.460 --> 00:36:03.070

Natalie Bergsma: I hate managing people.

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00:36:05.430 --> 00:36:07.069

Natalie Bergsma: I'm not a good manager.

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00:36:08.380 --> 00:36:18.250

Natalie Bergsma: It's so hard I don't know how to do it. If only someone else would do that for. But your role as a business owner is to lead and manage people

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00:36:19.690 --> 00:36:25.770

Natalie Bergsma: or hire someone who is really really good at that, so that you don't have to do it right who? Not? How?

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00:36:26.040 --> 00:36:35.069

Natalie Bergsma: So? As we go into today? If those are some of the mindsets that you have, and you're stuck in terms of growing and developing the team or big building job descriptions.

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00:36:35.210 --> 00:36:39.399

Natalie Bergsma: I actually want you to think about. What's your leadership mindset?

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00:36:39.690 --> 00:36:44.049

Natalie Bergsma: What are the thoughts that come to my head when I think about

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00:36:44.090 --> 00:36:47.130  
Natalie Bergsma: hiring, training, firing.

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00:36:47.510 --> 00:36:51.250  
Natalie Bergsma: sitting down with my team and having one on one meetings.

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00:36:51.590 --> 00:36:59.299  
Natalie Bergsma: How do we manage mistakes in our organization like, what's the the process and structure? But how do I actually approach it?

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00:36:59.540 --> 00:37:11.539  
Natalie Bergsma: I was in a coaching session a few months back with one of my clients. and he had a team member who just kept consistently making mistakes. And he's like, I'm so frustrated I'm so angry. And I said, Well, how do you show up

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00:37:11.740 --> 00:37:21.879  
Natalie Bergsma: to the conversations with that person? He was like? Oh. frustrated, angry, kind of pissed off, I was like, well. how is she going to respond to that

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00:37:23.300 --> 00:37:26.420  
Natalie Bergsma: right? He's like, well, she kind of shuts down, and she doesn't really listen

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00:37:27.470 --> 00:37:36.509  
Natalie Bergsma: right? So we couldn't even get to the issue. What was going wrong, what mistakes were being made because we didn't have 2 people who were connected

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00:37:36.760 --> 00:37:37.870  
Natalie Bergsma: to each other.

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00:37:38.080 --> 00:38:04.079  
Natalie Bergsma: Right? So as we think about that, we want you to evaluate. What's your mindset when it comes to building and managing your team? How often are you getting feedback from them? Do you have your own personal goals for leadership. Right? We think about building the business. But how do we build ourselves as leaders and managers? Right? How do we get better at mentoring, training and growing our people. And so

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00:38:04.230 --> 00:38:09.939  
Natalie Bergsma: and those are any of the things that you guys want to talk about. Today, I'm around. I'm available. I'm here to check.

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00:38:13.460 --> 00:38:19.079  
Allison Foulk: Awesome. Thank you, Natalie. Alright. Next up we have.

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00:38:19.700 --> 00:38:26.289



Liz Hand, CFP®: Yeah, it's great to be with you all today. my nephew just turned one

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Liz Hand, CFP®: this week this weekend and I've really been enjoying watching him grow.

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00:38:32.340 --> 00:38:46.880

Liz Hand, CFP®: I don't know if you've watched a baby lately that's not your own that you don't have personal responsibility over, but they're delightful like they're just so into their own world. They're happy. They might cry a little bit, but then they snap right back.

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00:38:46.910 --> 00:38:52.910

Liz Hand, CFP®: They have no concept of unworthiness.

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00:38:53.380 --> 00:39:02.789

Liz Hand, CFP®: but something shifts within each of us round age 3 to 6. Somewhere in that range where we take on a mindset of unworthiness.

183

00:39:03.580 --> 00:39:09.400

Liz Hand, CFP®: And as I, in Liz's philosophy of the world, which you know you can

184

00:39:10.020 --> 00:39:19.250

Liz Hand, CFP®: take, for however you want, and you can discard. However, you want like. That's the human story is that everybody believes at some level that they are unworthy.

185

00:39:19.360 --> 00:39:23.659

Liz Hand, CFP®: and the journey of life is uncovering our worthiness again

186

00:39:23.820 --> 00:39:29.000

Liz Hand, CFP®: because we had it. We had it for a couple of years. and we lost it.

187

00:39:29.220 --> 00:39:36.649

Liz Hand, CFP®: We decided we trained ourselves to believe that because we're unworthy. We have to do X or Y or Z as order to survive.

188

00:39:37.520 --> 00:39:46.400

Liz Hand, CFP®: And so when it when it comes to any type of lack of clarity. When you get to the root cause of it, it's the place of unworthiness.

189

00:39:47.470 --> 00:39:50.629

Liz Hand, CFP®: And so I was thinking about

190

00:39:50.690 --> 00:39:56.039

Liz Hand, CFP®: stuff alluded to this as well. But the idea of like procrastination is fog.



191

00:39:56.870 --> 00:40:12.260

Liz Hand, CFP®: and most of us will look at the procrastination and then judge ourselves based on it, and just get really angry, confused, frustrated, spun out because we're procrastinating. And it's just the fog. And underneath that fog is that story

192

00:40:12.280 --> 00:40:18.280

Liz Hand, CFP®: that overwhelmed story? And I'm curious. Do you know what your overwhelmed story is by this point in the year.

193

00:40:20.150 --> 00:40:24.200

Liz Hand, CFP®: If yes. type it in the the chat.

194

00:40:28.330 --> 00:40:31.449

Liz Hand, CFP®: My main overwhelm story is, everyone is angry at me.

195

00:40:33.080 --> 00:40:46.169

Liz Hand, CFP®: and it comes up in all different kinds of ways. Anytime I'm trying to make assert any sort of change I'm going to disrupt. Therefore everyone is angry at me. So if you think about someone leading a firm

196

00:40:46.600 --> 00:40:49.079

Liz Hand, CFP®: really wanting to make the limitless practice

197

00:40:49.480 --> 00:40:57.810

Liz Hand, CFP®: that will get in your way because you're going to bump up against every time you're trying to make changes.

198

00:40:58.320 --> 00:41:05.600

Liz Hand, CFP®: because change creates disruption. If disruption makes people angry at you, well, then, you may as well. Just not change.

199

00:41:06.130 --> 00:41:07.140

Liz Hand, CFP®: So

200

00:41:07.440 --> 00:41:16.879

Liz Hand, CFP®: you've got the fog of procrastination. You've got the story that's there. And ultimately, under that story is one thing that you've taken as fact.

201

00:41:16.890 --> 00:41:18.520

Liz Hand, CFP®: which is, I am unworthy.

202

00:41:19.630 --> 00:41:28.239



Liz Hand, CFP®: And so when it comes to all of these different areas that you're wanting to change, I wanted to draw your attention to 3 E's and that is.

203

00:41:28.450 --> 00:41:42.179

Liz Hand, CFP®: you know we can. You can always dig into the story and understand yourself better like that is such a helpful journey as to unravel it and catch it much more quickly and jump back into a place of productivity and joy.

204

00:41:42.620 --> 00:41:47.620

Liz Hand, CFP®: And we can just get into these 3 E's, and they are energy.

205

00:41:47.940 --> 00:41:50.490

Liz Hand, CFP®: enthusiasm, and excitement.

206

00:41:51.210 --> 00:41:54.380

Liz Hand, CFP®: And so perhaps you have your your why written out?

207

00:41:54.630 --> 00:42:00.750

Liz Hand, CFP®: And you know what your next step is, you know that thing that's supposed to be there?

208

00:42:01.030 --> 00:42:20.179

Liz Hand, CFP®: Have you taken the moment to sit in that space of excitement and enthusiasm and energy for what's next for you? Casting aside every other potential person around you that might get bring up the what ifs or that doubt that creeps in? Can you even get 30 s in

209

00:42:20.200 --> 00:42:21.500

Liz Hand, CFP®: within a day

210

00:42:21.840 --> 00:42:24.340

Liz Hand, CFP®: in the morning? Maybe the first thing in the morning?

211

00:42:24.650 --> 00:42:28.789

Liz Hand, CFP®: So as we split out into the

212

00:42:28.820 --> 00:42:38.409

Liz Hand, CFP®: breakout rooms. This is where we'll be focusing, either you can. You can shape the conversation. How you want. We can look at that place of overwhelm if you haven't defined that story for yourself.

213

00:42:38.770 --> 00:42:45.650

Liz Hand, CFP®: any sorry distracted. There's some training happening next to me.

214

00:42:45.760 --> 00:42:54.259



Liz Hand, CFP®: And then also sitting in that space of energy and excitement, and maybe even drawing that forth to help you see it and sharing that space together.

270

01:25:31.450 --> 01:25:44.649

Stephanie Bogan: Welcome back, everyone. I was just saying I literally was mid sentence. So, Danielle, I'll type the rest of that assignment in the chat here in just a second. We have. What? 20 min, Allison time? Check

271

01:25:44.670 --> 01:25:57.689

Stephanie Bogan: 1413. Set in the timer right there, people. Andy. Dandy timer time. What is it? Promptness is my, this is my new mantra. Right? Cause you gotta give yourself like a vision when you want to create something new

272

01:25:58.010 --> 01:26:00.329

Stephanie Bogan: promptness is the courtesy of kings

273

01:26:00.730 --> 01:26:10.170

Stephanie Bogan: makes me feel very classy and regal. If I could be more on time, I was like very courteous. I don't want to be not courteous, right? Like, I'm always like, you gotta be a good human.

274

01:26:10.190 --> 01:26:26.039

Stephanie Bogan: So yeah, that's when you think promptness is the courtesy of kings. Oh, danielle! And our group were talking about vision, and where we go from here we were giving them some direction and assignments. What was happening in the other rooms. Anyone have any good shares?

275

01:26:26.400 --> 01:26:30.410

Stephanie Bogan: I won't say anyone, I say, who has a good share. Take ownership.

276

01:26:32.720 --> 01:26:34.100

Stephanie Bogan: key takeaways.

277

01:26:34.190 --> 01:26:36.209

Stephanie Bogan: What'd you get out of your time.

278

01:26:37.960 --> 01:26:49.519

Samantha Blanchette: I'm gonna start calling on you randomly. Natalie really helped with figuring out structures and things for our teams to make sure that we're going over the information in a better way.

279

01:26:50.020 --> 01:26:52.289

Samantha Blanchette: And how to lead a little bit better

280

01:26:52.550 --> 01:26:55.359

Samantha Blanchette: was very helpful. So thank you, Natalie.



281

01:26:55.740 --> 01:27:03.020

Stephanie Bogan: Bonus points for Samantha for speaking him first. All right. Who's next? Darren? How about you? What were your takeaways from your session?

282

01:27:07.790 --> 01:27:12.349

Stephanie Bogan: You're you're on mute. I've just said you know how that. Do you remember the Verizon commercials

283

01:27:12.480 --> 01:27:21.620

Stephanie Bogan: where the guy was always like? Can you hear me now? Can you hear me now? I'm pretty sure that the most uttered phrase on the planet right now is. you're on mute.

284

01:27:22.570 --> 01:27:30.199

Stephanie Bogan: Can you hear me now? Can you hear me now? I can. That's the second most utter phrase, because that's what we say. When we come off of mute

285

01:27:30.470 --> 01:27:33.220

Daren Chamblee: I will. Tiffany killed it, by the way.

286

01:27:33.280 --> 01:27:39.400

Daren Chamblee: and so one of the biggest things that I got was don't try to lift too much at one time.

287

01:27:39.760 --> 01:27:45.799

Daren Chamblee: which I couldn't agree with her more because I've tried the audio podcast and the video.

288

01:27:46.200 --> 01:27:53.800

Daren Chamblee: And when you said doing those, don't try to do both of those I thought, absolutely, that's the greatest idea.

289

01:27:54.410 --> 01:27:56.420

Daren Chamblee: Keep that out in here. Sooner

290

01:27:57.330 --> 01:27:58.729

Stephanie Bogan: pick and focus.

291

01:28:01.070 --> 01:28:05.439

Stephanie Bogan: Oh, look, Adam, said, his grandpa said, if you be one thing in life, be on time. I like that.

292

01:28:07.980 --> 01:28:33.540

Stephanie Bogan: Yeah, we always talk about with marketing like, pick one thing that you really, when we



talk about laying the tracks and building out the funnel like if you pick one thing and do it really, really well, you might find you never need to get to a second thing. But when we pick 3 we don't tend to execute on any of them with just the focus that we really need right where we go. Wow, it's not working. And it's taking so long. And it's because right. We're dividing our efforts by 3,

293

01:28:33.770 --> 01:28:48.770

Stephanie Bogan: and to Tiffany's very on point. Once you feel like you've got that flywheel rate that Adam and I talk about so much. Once you feel like you've got that going great like, go ahead and lay another track. Worst kid thing that happens is you're smart enough now to go. Oh.

294

01:28:48.910 --> 01:29:04.650

Stephanie Bogan: I'm gonna need to invest more, or I'm gonna need to wait until I have more time. Because I I'm getting some results. But I recognize right. I'm not all in and therefore not get like you. Just kind of get that discernment as you practice laying more tracks. But step one is like, don't try to build 3 railroads across the country at once.

295

01:29:04.860 --> 01:29:09.900

Stephanie Bogan: Really clear on where you're gonna focus, double down on doing it really well.

296

01:29:09.980 --> 01:29:13.659

Stephanie Bogan: And then, when you've got that nailed, feel free to experiment

297

01:29:13.900 --> 01:29:18.070

Daren Chamblee: my step one. This, my one thing this year is just been a newsletter.

298

01:29:18.260 --> 01:29:24.109

Daren Chamblee: and I've gotten it to 6, 65, and a half percent average open rate. Now

299

01:29:24.530 --> 01:29:51.369

Stephanie Bogan: that's fantastic. And that's where you can start to look at hacks like, do you have seating? Do you have a referral share? Is there something in that newsletter that people would want to share? Right? Are you packaging things or resources or making notes so that there's a higher likelihood, right? So you can start watching the open rates and the click throughs on things like that to see if you can write it better and better at amplifying the performance of your newsletter

300

01:29:52.680 --> 01:29:53.980

Stephanie Bogan: honing the graft.

301

01:29:54.640 --> 01:30:02.349

Daren Chamblee: I say, 40, yeah, 65 is great. Are you using it on LinkedIn.

302

01:30:02.760 --> 01:30:07.310

Daren Chamblee: No, I use it. I send it. I do it through Mailchimp. But I'm not

303



01:30:07.470 --> 01:30:09.190  
Daren Chamblee: putting it on LinkedIn at all.

304

01:30:09.250 --> 01:30:18.540  
Stephanie Bogan: Yeah, the LinkedIn Newsletter Newsletter is my latest favorite. Ho! Most unknown and underrated resource. Because basically, if you have

305

01:30:18.620 --> 01:30:32.410  
Stephanie Bogan: right contacts or followers on LinkedIn, you can literally take your newsletter, paste it into the. It's very affordable. I don't think it's very much at all paid literally. Paste it in. It's like it's a couple of clicks. I figured it out all by myself. That tells you how easy it is.

306

01:30:32.460 --> 01:30:37.960  
Stephanie Bogan: and it literally blast that newsletter out to everyone on that's following you on LinkedIn.

307

01:30:38.570 --> 01:30:58.600  
Stephanie Bogan: So they don't have to give you their email yet. So it's a way to reach them. LinkedIn likes it because it keeps people in their ecosystem. They don't like sending people out. They much rather keep them in, so they've made it very easy for all of us to share our blogs and newsletters via LinkedIn and again, the level of effort. There is very low. But then you can write.

308

01:30:58.910 --> 01:31:05.420  
Stephanie Bogan: connect to people and new people and groups. Right? They follow you. They get it, and it's just a way to expand the top of the funnel for you.

309

01:31:07.740 --> 01:31:11.970  
Stephanie Bogan: Good news, sir. Well, you've had a heck of a year, haven't you? And you made it, didn't you?

310

01:31:12.100 --> 01:31:13.150  
Daren Chamblee: Okay.

311

01:31:15.560 --> 01:31:24.120  
Daren Chamblee: I'm you know, I'm pretty in control of my schedule, so I think it's the only way. You know it's just time blocking.

312

01:31:24.590 --> 01:31:31.670  
Stephanie Bogan: We were just talking about that in the vision session, just managing ourselves right to to be in line with the vision for sure

313

01:31:32.870 --> 01:31:40.679  
Stephanie Bogan: right. Anyone have. What questions do you have anyone have questions for any of the coaches, or going to share your next takeaway? We have 9 min.



314

01:31:42.870 --> 01:31:45.640

Stephanie Bogan: Is everyone waiting for someone else so that they can listen.

315

01:31:48.280 --> 01:31:51.759

Stephanie Bogan: I would say, why don't you share that with the group? I think that's a good add for everyone.

316

01:31:52.210 --> 01:32:18.109

Tiffany Charles: Yeah. You know, we've been really like working with this mail bag piece of things in general. And so like our webinars. But when they sign up. It's like, do you have any questions that you would like? Answered as a part of the webinar? We do our markets and economy moving one every month, and clients will send and or peis or prospects will send questions in ahead of time, which is great.

317

01:32:18.110 --> 01:32:25.029

Tiffany Charles: For us, because we can prep for them and or determine which ones will just respond to offline

318

01:32:25.130 --> 01:32:30.649

Tiffany Charles: and we've now implemented that into our newsletter as a client.

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01:32:31.130 --> 01:33:00.680

Tiffany Charles: We have so many questions that come in from clients where I'm like that's probably applicable to a lot of clients like, why don't we have a client ask an answer. Section of our newsletter as well. So they have the ability to write in those questions which is super great. Where they think it would be. Clients think that it would be valuable to have that as a bigger share outside of just their own. But we also, if we don't get any, have? I mean, think about all of the questions that you get. So it looks like clients are engaged to, which encourages other clients to engage, and we can answer those questions.

320

01:33:00.680 --> 01:33:09.180

Tiffany Charles: And we're adding our CIO to our we're revamping our newsletter as well.

321

01:33:09.430 --> 01:33:19.959

Tiffany Charles: to the point of like, once you learn like daring, we have similar open rates like, it's just really it's a really positive thing that we do. So we're expanding upon the ways in which we do it.

322

01:33:19.960 --> 01:33:42.030

Tiffany Charles: but they can ask market and economy and investment questions. Directly to our CIO, and he's gonna do a QA. On that. But that's been a really cool way to get engagement through content in a different way. And so just thinking about your webinars, your content, your podcast, right like whatever it is that we're doing videos like.

323

01:33:42.030 --> 01:33:54.769

Tiffany Charles: what do you want me to write? Do a video on next month right like. Encourage them to send in what they want to see and hear and learn about but that's been an awesome addition to the things that we've been doing.



324

01:33:55.160 --> 01:34:03.460

Stephanie Bogan: Yeah, I love that for a lot of reasons. It does really demonstrate engagement, and it gives you man just a bucket of ideas for

325

01:34:04.270 --> 01:34:26.190

Stephanie Bogan: blogs, newsletters, podcast you know, because client questions are ultimately not just client questions. They're everyone else's questions, too. So you know, sometimes I don't know about all of you. I will sit around going. What do I put on social today? I like nothing's coming to me. And I'm like, Oh, this is ridiculous. There are 1 million I could like call any one person it'd be like, tell me what's going on in your day and find 50 things.

326

01:34:26.270 --> 01:34:41.729

Stephanie Bogan: and sometimes it's just nice to have those right. I've got a bucket of ideas where I'll just drop stuff in, and then I'll be like, Oh, I did that this morning I was like, oh, I only have a little bit time, pops. Oh, that totally like Boom inspired, and go so it's just a good strategy for a lot of reasons so definitely something to consider.

327

01:34:43.090 --> 01:34:55.450

Daren Chamblee: I find the highest clip rates are not investment related. It's actually things like artificial intelligence articles like on AI like on.

328

01:34:56.030 --> 01:35:02.040

Daren Chamblee: you know. Identity theft. Those will get the highest clicks.

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01:35:02.910 --> 01:35:09.949

Stephanie Bogan: Yeah, I don't know anything. That's wh what we call hot topics right tiff. And and Jared are really really good at this.

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01:35:09.980 --> 01:35:24.550

Stephanie Bogan: If it's going on in the world right now, it's their brain is paying attention to it. So it's just an opportunity for you to see the messages, viewpoints right? Right? Or reinforce those communications. Because

331

01:35:24.580 --> 01:35:35.540

Stephanie Bogan: right? So we have. We had a an advisor and leaders named Kyle, and he as clients for retirees. But every Sunday, at exactly like 805 Am. He would send a 2 min video

332

01:35:35.560 --> 01:35:49.290

Stephanie Bogan: on hot topics, literally like, what's inflation gonna do to social security? Right? What's going, you know, is what's going on. The world gonna affect the markets in my retirement, like just lit, not like a specific like just stuff that's going on

333

01:35:49.310 --> 01:35:56.860

Stephanie Bogan: right, or like things that many quite like, Hey, we've been getting a lot of questions



lately about blonde. I just wanna take a couple of minutes, and he's just

334

01:35:56.960 --> 01:36:09.749

Stephanie Bogan: super relatable. and they're very short and they are hyper open. They're open rates are ridiculous. If he doesn't send it for any reason. He's like, I get 20 emails in my inbox going is everything okay, like

335

01:36:10.190 --> 01:36:16.339

Stephanie Bogan: a couple sit down with their coffee on Sunday, like it becomes, those kinds of things are very referrable.

336

01:36:16.400 --> 01:36:21.010

Stephanie Bogan: and they're very relatable. It people just want to know. Remember, can I count on you?

337

01:36:21.050 --> 01:36:28.590

Stephanie Bogan: And so when you're talking about what's going on in relationship to their financial life, right and or reinforcing messages.

338

01:36:28.630 --> 01:36:46.520

Stephanie Bogan: It's just more right. You get me. You hear me? You understand me? You're paying attention to the things that are happening, and you're thinking about me and my plan as those things are happening good to know that I can count on you. So that's where those kinds of mentions or snippets and blogs, newsletters, etc., can be, can be really nice, too.

339

01:36:50.170 --> 01:36:56.200

Stephanie Bogan: Right? Guys, you have 4 min. Who's got a burning question? Someone must. Guys are so quiet today.

340

01:37:00.800 --> 01:37:02.589

Stephanie Bogan: Matt Hoskins. How are you, sir?

341

01:37:07.570 --> 01:37:21.260

Matthew Hoskins: Hey? I'm good. How are you? Sorry I didn't. You did. I had a phone call come in from a an investor. And so I was trying to talk to not getting it going. So I'm good. How are you? I'm happy today. How's everyone else doing?

342

01:37:21.340 --> 01:37:27.529

Matthew Hoskins: You guys are okay. You guys gotta wake up just a little bit what? There? Liz gave me a whop.

343

01:37:28.560 --> 01:37:39.679

Matthew Hoskins: Any burning questions, Matt? I know you were out for a bit of it, so I don't want to put you on the spot, but I'm putting on spot. Well, you know, I actually really liked hearing what you were just covering there as far as



344

01:37:40.380 --> 01:37:54.770

Matthew Hoskins: as far as the the newsletters and things like that, because that's that's going to be a big part of my strategy moving forward. But instead of you know, saying directed to clients, it's going to be social media posts, specifically through Instagram, and I love what you just said.

345

01:37:54.770 --> 01:38:13.009

Matthew Hoskins: as far as you know, basically, you know, pull your audience and get your topics from there. So that was definitely something that was, I'm just thinking, that's how easy is that, hey? What do you guys want to hear about? They'll they'll let you know, send you up several things. And so that was one of my takeaways so far. As far as

346

01:38:13.320 --> 01:38:24.430

Matthew Hoskins: letting letting clients know. Hey, what's important to you. I wanna talk about it. But the other thing, too, somebody mentioned that th, the things that they tend to get is a lot of non financial questions.

347

01:38:24.630 --> 01:38:27.470

Matthew Hoskins: So my question I guess there is.

348

01:38:28.570 --> 01:38:36.540

Matthew Hoskins: If you get a lot of non financial, let's say there's 10 people who respond, and 8 of them are non-financial. 2 of them are financial. How much time should you spend

349

01:38:36.580 --> 01:38:40.930

Matthew Hoskins: on non-financial things versus the financial stuff?

350

01:38:41.330 --> 01:38:47.599

Matthew Hoskins: Because obviously, that's what we're here selling. That's how we make our money is with the financial things, but we want to provide value in everybody that we possibly can.

351

01:38:48.270 --> 01:38:58.120

Stephanie Bogan: I'm gonna let Tiffany start with that one cause I think she's probably got a perspective, Liz, Natalie feel free to jump in on that, too, Adam. I see you there. Did you get glasses, or did you? Did you always have them, and I missed it.

352

01:38:58.750 --> 01:39:01.860

Adam Cmejla, CFP®: I'll I'll call that random

353

01:39:01.990 --> 01:39:16.860

Tiffany Charles: blue light glasses I'm just having fun with. I'm just having fun with a random thing that I found in the in the office when I was cleaning out the office. Hey, blue blue glasses! Let me try these out for a little bit. Great question on the time. So here's the thing.

354

01:39:17.420 --> 01:39:32.099

Tiffany Charles: non, financial and financial end up being like a way to combine both right because money is tied to everything. And so what we want to do is really speak and hear and address the questions that they have. I would say.

355

01:39:32.290 --> 01:39:50.329

Tiffany Charles: look at themes and trends and see those things. But how do you answer it? Like you can answer things around well, being retirement, living their life, investing in certain things and whatever it looks like, outside of the financial component. And then you can add underlying strategy to that. So if it depends on like

356

01:39:50.330 --> 01:40:06.270

Tiffany Charles: who you're focusing on? What exactly are you looking to push and have your content themes? So I think it's really important to know, like, what are what is the content that you're looking to put out. All questions are welcome. But how do you wrap it into what you are looking to establish yourself

357

01:40:06.270 --> 01:40:22.139

Tiffany Charles: as that that brand and identity that you're looking to consistently put out. So if you're really looking to bring that right back into your home investor and what that looks like, answer their question, and then tie in a way, or a case study, or a

358

01:40:22.140 --> 01:40:49.530

Tiffany Charles: that also brings in like something that you would like to get across as well. So those are approaches that we would take in something along those lines like it wouldn't just be like, you know, how do you cook your grandmother's Lasagna like it would be like, you know, putting some sort of story that brings them back into who we are and why and how there's a recipe for success. Right? You gotta try it multiple times before you really masturbate like

359

01:40:49.540 --> 01:41:01.619

Stephanie Bogan: that. That that's what I mean by like taking those hot topics and making them relatable to tiff. I think Tiffany makes a really good point. You turn them into the message that you want to reinforce. You use that as the basis.

360

01:41:02.640 --> 01:41:11.150

Stephanie Bogan: Alright, we are coming up on the end of our time. I I'm sorry, Austin. It is 10 Am. Mountain time. I'm awful with time zones if anyone's looking at the chat.

361

01:41:11.840 --> 01:41:41.339

Stephanie Bogan: hope the workshops and the sessions kind of the breakouts were helpful to everyone. Today. Sounds like they were super positive, and you got some good things like I shared. We like to do these calls every so often, just to give you some options to dive in a little bit deeper in a smaller group, and have some conversations with the coaches and peers about where you need support. So thank everyone for coming today. As always, we're in tribe coaching calls and office hours. Don't free feel free to reach out to us if we can be of help to you. Everyone make it a super great day. Oh, and I need to give Michelle Glass

362

01:41:41.340 --> 01:41:46.269

Stephanie Bogan: a big shout out for 20 s of bravery. So everyone just say, Go, Michelle.

363

01:41:46.490 --> 01:41:57.169

Jeffrey Dunn-Bernstein: Stephanie, the email for those upcoming. Zoom says, 10 to 1045 Pacific. Okay? Then that is correct.

364

01:41:57.440 --> 01:42:15.949

Stephanie Bogan: See? I told you. I'm back. I have to look at my calendar. I don't know where I'm at, but you're right. I just say that I live by my calendar. I am not joking, I will go on, and if a task isn't red and red means to call, and it's blue, I'll be like, oh, I could do that. Whenever I'm gonna go hang out with Emma for a little bit I'll be like.

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01:42:15.950 --> 01:42:40.929

Stephanie Bogan: oh, someone forgot to make it red. I missed a phone call. That doesn't happen very often. But like, when I'm just looking like everything is color coded like. That's how reliant I get on the system. So don't we have now I gotta check, but everyone have a great day. If we can help you out, let us know. But make the most of it. Let us not roll into the end of the year. Let us rev it up so that we start 2024 from a confident and empowered place. Have a great day.

