

# LIMITLESS Coaching Call Transcript

November 6th, 2023  
Leaders Coaching Call  
Business Planning

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Stephanie Bogan: So just some updates there, this lesson is really, we're gonna do a quick refresher cause. It's much more about the conversation, since you've all, you know, put some version of this, or at least started to put some version of this in place. We really wanna anchor you to the key ideas.

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Stephanie Bogan: and then spend some time, as I mentioned, really talking through how this process has been working in your firm. Where are there any breakdowns. Where is it going? Really well, and we can just rate, collaborate and learn from each other as we go through that process. So that's business planning today

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Stephanie Bogan: as always. Don't feel feel free to drop questions. And Neil, no problem the dogs has gotta go to a doctor's appointment. So I get that for sure. No worries. We all have priorities, being gotta take care of the puppies.

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Stephanie Bogan: You may remember this. We call it a proven system for managing process and performance. Here is, say, a lot here at limitless, that the system will save you, which is code, for you have to build a system that's bigger than the resistance that you will face and the resistance when it comes to planning and priorities is usually us. Sometimes our team right getting the momentum I was just in. We're doing some private client work with a couple of 1 billion dollar firms. And I kid you 2 firms. And then one of our leaders in the span of one week

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Stephanie Bogan: in 3 calls, said in the same but different ways. We've been talking about this a lot for a while.

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Stephanie Bogan: We just haven't gotten around to it. So you guys are better. And so, especially those of you on the call are better than average at executing. You've all done a good job of that this year, but managing performance is really about managing clarity and momentum ours and the team. So we want those processes to be proactive process oriented priority focused. And then what we're trying to do is put in a professionally managed layer, even if it's a light layer.

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Stephanie Bogan: right? So that we're not that. One of the founders in his eighties of one of these 1



billion dollar firms said. But we freestyled, soloed it for so long. Why can't we just keep doing that? I'm like, well, you know your size. It gets a little crowned upon to just wing it every single day.

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Stephanie Bogan: You're not there, but a lot of firms grow into compounding complexity and problems, because we don't get that clarity. We don't deal with operations or staffing, or efficient growth, or right size in the client base, or the right kind of marketing along the way, so we can grow

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Stephanie Bogan: by adding assets and clients. But it doesn't necessarily mean we're growing into the kind of business and leaders that we want. So just remember this model, you can go back to the vision lesson, the action accountability lesson. And then don't forget there's that strategic planning lesson that goes even deeper. You want to do offsites with your team right to swat. Sort of. There's a whole Powerpoint deck you can put together.

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Stephanie Bogan: But what we talk about here is having a simple plan is the best kind of plan

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Stephanie Bogan: cause that's usually the one you might act on.

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Natalie Bergsma: Yeah. And I think in terms of a simple plan, right? A one page plan to map out the vision and what you've done here. One of the things that I find useful is right. If we were really clear on what we're going with. Decisions are easy. So if we know where we want to be and 3 year one year, and currently, then we can take a look and map out. What are all those things that we need to do in order to get here? And I think one of my favorite exercises here is

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Natalie Bergsma: kind of looking at that 3 year goal and strategy. First, right?

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Natalie Bergsma: When I think about strategy and planning, they're a little bit different. So as larger organizations. You're gonna be much more focused on. What's the 3 year strategy? Right? How do I execute in my marketplace? What's gonna differentiate us? And

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Natalie Bergsma: how do we then translate that into goals in order to get there, and then break that down into more tangible one year? Goals like, what are the milestones to get from point A to point B. And what's it gonna take to do that, whether that's revenue or aum or average client? But also kind of who our ideal clients are. And you guys are, gonna go deeper into all of the different areas of the business that we'll talk about

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Natalie Bergsma: in that Quarterly Business Review. But I think one of the reasons that I love something as simple as this is. I can't tell you the number of larger firms that I've gone into, and they set their goal

for revenue in Aum

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Natalie Bergsma: and new clients. And then they didn't do the math to see if those things actually aligned right? So actually backing into the the numbers and saying, Hey, okay, if it looks like this, how do we get there? And as a larger firm. Sometimes there's more. I think we have a goal planning exercise as well, Stephanie, where you can actually break down.

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Natalie Bergsma: hey? If we brought in 10 new top tier clients and 5 new main tier clients. What does that look like? So some more advanced planning kinda take place here, but really take a look at things like, Oh, I wanna grow revenue 20% a year, which is great. But it tends to be this arbitrary goal that we stick up on the wall, because it seems like a good number.

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Stephanie Bogan: So to Natalie's point, about where the opportunity is. As we look at those 3 year goals or beyond, we can use those to then reverse engineer. If my goal is to have X revenue in 3 years and 25 less clients. That means right. My revenue per clients gonna need to be X. What's it gonna take? I'm gonna need to see a 47% increase in revenue per per client over a 3 year time horizon

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Stephanie Bogan: when we start our planning for year. One year, 2, year, 3. Now we're like, okay, this year. Now, I can break it down even further. Now, it's a lot easier for my brain to go. Oh, okay.

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Stephanie Bogan: we need 27 clients at, you know, 9,700. And our average run weight is 18. So we actually only need 9 new clients a year, which is about 2 and a half a quarter. Now, it's gonna take right? I need 2 and a half clients at this higher average to hit my goals. Well, that gives me and my brain a lot more specificity to work with. Now it's not like you go. Bro. Brain goes. Want want Charlie Brown's mom? No idea what you mean.

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Stephanie Bogan: Now we can break it down. Now we can look at our our annual plan and go. Okay, if that's my goal for the year. That's the growth bucket goal. I remember this top 3 goals for each year. Right? Let's call that a top practice goal. What am I gonna need to do in to really make sure I'm laying the track to get that done, is it? You know, client based analysis, is it

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Stephanie Bogan: raising the minimum? Is it a fee increase? Is it hiring someone? Is it updating the marketing copy and building a script. And if you go into the workbook which we're gonna show you very briefly in a moment

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Stephanie Bogan: each quarter. We then look at, what do we need to do? Over 30, 60, and 90 days to get there? So now, it's not like one big blobby goal. It's okay. In the first 30 days. I'm gonna need to do this in the next 60 days, right? And by the end of the quarter I'm gonna have the client analysis done. I'm gonna have decided on the new fee. I'm gonna publish my minimum on the website, and I will have had

that conversation with, you know, 10 of our clients

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Stephanie Bogan: right now. It's really easy to break down. What do I need to do each week? Think about your Mondays with what I spend my time on. One of the biggest challenges I've noticed in conversations is we don't know what we're spending our time on working on the business and have time blocked out. When we get a 2 h block we're like I don't know, and we waste half the time.

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Stephanie Bogan: If you've got 2 or 3 h blocked every Monday morning or afternoon to work on business priorities. You've got your team meetings, you've got limitless calls, and you've got right work on the business priorities that should be really focusing your Mondays.

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Stephanie Bogan: It should be really straightforward for you and your team. Right, Allen. Neil, should be able to be like. And here are the things we need to get done this week to stay on track with the plan. If we sit down each week and go. Oh, what should I do this week? The odds are 95%. We're not going to do very much right. Remember that the the odds have changed or stacked against this 9 to one Travis, we are 95% hardwired to do what we did yesterday. Today. That means we get a 5% window

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Stephanie Bogan: right of operating agency that we're trying to insert ourselves in. And that's why these processes is so important. There's like those, you know, in the the superhero movies where someone puts themselves, or like the jaws of death under the door to keep it open. That's what planning and priorities is. So we don't just get stuck on the overwhelm wheel. Right of go do run the shop every day.

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Stephanie Bogan: So you're very familiar with the one page plan at this point, really, as we're sitting there and looking at the 3 year goals. And you're doing your strategic planning. We really wanna break that down into a one year plan that when you hit January, you're ready to say I'm clear. I know what priorities I need to focus on. And I know how we're gonna apply work, time, energy, and capital in this next 90 days to get this ball down the field, and that's where

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Stephanie Bogan: we did the coaching roadmaps at the beginning of the year, right to look at those quarterly priorities, and then the Quarterly Business Review Workbook. Which, again, is it? Kind of a right, a professionally managed process. You can skinny it up if you've got fewer people. But it's a really good exercise to go through, because it's a forcing mechanism for asking yourself the questions that will create awareness

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Stephanie Bogan: and write some of these other big ones.

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Natalie Bergsma: So as we talk about creating, I think we we skip the one page plan. But I think you all have those in place? Right? What's the the plan for the year? And how are we executing? I think one of the important pieces is as you grow, the question becomes, not, how am I executing? But how can I then



delegate out to the team, and then putting out a quarterly business review in place to assess all of those different areas. What's our financial performance in our

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Natalie Bergsma: are we on track? What's our marketing performance? Are we meeting those goals. Why or why not?

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Natalie Bergsma: Right? Look at the practice performance which covered things like teams and talent. Right? Planning for you. Think about those goals we talked about in terms of numbering new clients and average revenue per client. You can actually start beginning to calculate. When do I need another advisor? When do I need an associate advisor to come in into support.

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Natalie Bergsma: The team. So right? Really digging into how the firm is performing overall, but also right starting with, what are my personal and professional performance goals? Right? Because if we don't set goals for ourselves, the business is going to run us instead of us running it. So what are the actions that we're gonna take in each of these areas? So having a systematic process to review them, evaluate what's working? What's not what needs change.

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Stephanie Bogan: Yeah. And I think that Natalie's point, right, personal and professional, are not.

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Stephanie Bogan: or practice and professional are not the same thing right? You might wanna increase the client size. But you might say, Hey, I want to be a more effective leader. I, you know, want to get out of rate doing, you know, revenue draining things. 50% of the time. I wanna get my Cfp

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Stephanie Bogan: right? It's what what are you doing personally as a professional leader founder right to drive yourself in the organization for so just a little point and clarification on that one.

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Natalie Bergsma: Yeah. And I think the the big structure behind this is progress right? How do we keep the firm? Not just us as leaders, but the firm making systematic progress again and again. And I think, as you grow

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Natalie Bergsma: creating that structure, and progress is not a not just about you. But how do I engage my team in that process? What's their role in strategic planning and business planning and execution. How do I keep them motivated and engaged? So how do I engage them in this entire process, so that they're as invested in these changes in the business

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Natalie Bergsma: as I am, and everyone on the team is working in lock step to make that incremental progress and create habits out of it, right? So it's really sort of feeling from the top down in terms of



moving towards a goal, not just as an individual, but as an organization as a whole. And who's going to be responsible for those things? And how do you keep them motivated and engaged? And on point throughout that process.

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Stephanie Bogan: Yeah, one of the things I've heard a lot over the years is where I think this planning process or rates some version of it for your firm works to. Natalie made a really good point, which is, we don't just want our momentum to be good.

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Stephanie Bogan: Ultimately we want to leverage the team so that they can move the ball down the field in increasing with a with increasing autonomy independent of us.

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Stephanie Bogan: So we talked a few a fair bit this year about right? Once you've got those priorities in place, you can put a system in place where the team knows what's expected. We're doing. We? We call it scoping a project. We sit down. We're like, Hey, team, this is what we're working on this quarter. Here's what we're gonna need to do in 30, 60, 90 days.

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Stephanie Bogan: Right? We talk about who's gonna do what we put those right tracking and accountability mechanisms in place. And now what happens? Which is the Holy Grail is what I always hear from advisors and founders is as long as I'm in the car with my hands on the wheel and the foot on the gas. Everything goes

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Stephanie Bogan: but the second that I take my eyes off the wheel, or I take my foot off the gas. We steer left or right, or the or the car stops going. I gotta get in and push the car. I gotta create the clarity and the momentum and the accountability.

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Stephanie Bogan: That's because you don't have a process for momentum inside the firm. professionally managed firms, even when they get too bureaucratic. Right? That's the downside. That's not where you want to go

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Stephanie Bogan: right. You know, Jen Worth, we would. Do, you know, 27 versions of the strategic planning deck every year, and I was like it really never needs to take this long like this is insane, right? But it also maybe doesn't take 2 s right? There's again for your size, team and style. There's really a sweet spot. And what matters is

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Stephanie Bogan: that we have a process for managing change in the organization. That's what we're really talking about, identifying our vision and goals, identifying gaps that need to be accounted for

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Stephanie Bogan: selecting the priorities and the projects we're gonna work on to fill those gaps and then monitoring and managing that process over time to make sure that the flywheel's moving and people are doing what they need to do when you get it going.

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Stephanie Bogan: The process moves things down the pike. It's not Neil or Travis, or Lean, or John, right? The process is there, so we can invoke a lot of change in a firm without change, fatigue when we're clear and intentional, and we get our teams invested versus, hey, we've got a whole bunch of new fun projects for you guys, we have a problem. We need to have a meeting. Let's get this knocked out

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Stephanie Bogan: can feel very overwhelming to team. So a discipline process for managing priorities is really just a process for managing change, growth and development in a way that you and teams can like build a consistent process around, so it doesn't feel uncertain or overwhelming.

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Stephanie Bogan: You might remember these are the core things, right? The the 3 year Vision, the one page plan and the Landscape Review is where the Quarterly Review starts. It's good, remember, most business owners are running constantly on the treadmill, and we get off and we go home, and we take a quick break and we come right back and do it again.

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Stephanie Bogan: Really effective founders and leaders have clarity and intention and alignment around their their execution, and that means moments of pause. This is why we talked so much about the Friday check-ins in master minds. The ability to sit with yourself once a week and say, What are the goals? Did we stay on track or right? Are we doing? What we need to be doing is a constant reminder. Right?

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Stephanie Bogan: Align, align, align, align right. We constantly have to reorient into the greater goal. So we wanna look at our 90 day action plans. And to Natalie's point we want to evaluate financial practice, marketing and personal goals relative to performance. That might be for you. That might be for the team.

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Stephanie Bogan: And again, the deep, deep details are in there. But you guys are familiar with the profitability analysis and the benchmark at this point but these are tools that you can use, in addition to other data

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Stephanie Bogan: to check in with yourself on how it's actually going each quarter to Natalie's point. If you say that you're gonna raise your average client right? Going back to the big goal, we're gonna raise our average client revenue 47% over the next 3 years, and the next 3 clients we bring on are below that minimum. We're gonna be like, yay, we won. But our spreadsheets gonna be like, actually you went the wrong direction. Right? You diluted, you grew revenue, but you diluted performance. So

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Stephanie Bogan: these tools give us a little bit of a peek under the hood, if you will

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Stephanie Bogan: not anything you want to add to that, because I just realized that was your slide.

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Stephanie Bogan: Sorry I can't see it with a microphone in my way. You're on mute. By the way.

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Natalie Bergsma: I think the only thing that I would add is as you get more systematized for, sort of as you're leveraging your Crm more.

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Natalie Bergsma: you can build these things into bigger processes, your pipeline reporting those sorts of things to kind of create automations around it. But if you don't have those yet, these are a really good place to start to say, Hey, this is what I want my reporting and metrics to look like. And then, as you grow, you have a baseline.

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Stephanie Bogan: Yeah, don't forget. I don't think we have it on this slide, because we haven't updated it for next year. But you have the marketing dashboard now that we did the last

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Stephanie Bogan: leaders event and I don't. I've I've yet to see a Rob as robust a marketing dashboard. You won't use all of those tabs because you won't do all of those things, but for marketing performance outside of your crm, that's a good place to track and monitor that data over time

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Stephanie Bogan: data is your friend because it tells you if what you think you're doing is actually what you're doing. You know those boxes on the side of the road, the speed boxes where you drive by, and it says the speed limits 20, and it tells you that you're going 24, or 18.

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Stephanie Bogan: You remember those?

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Stephanie Bogan: Do you all not know what the speed limit is?

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Stephanie Bogan: Of course we do we have. And look! We have a dashboard on our car with a speedometer right there, telling us how fast we go. Why do they have those boxes on the side of the road

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Stephanie Bogan: because they've done studies that show they reduce speed by 87 for 87% of the time.



Because it's not. It's not something that's in your habit background. your speedometer on your dashboards and your habit background. You don't tend to check it all that often

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Stephanie Bogan: when you walk by, when you drive by one of those boxes, it's giant, and you see it, and it flashes at you, and your brain goes. Oh, wait. Slow down, or I can speed up.

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Stephanie Bogan: That's what the review is, whether you're just looking at Aum reports. You're doing right. A deeper set of reports with your team the way that Tiffany and Jared do. It's the feedback loop. We need an external feedback loop to orient us to the destination, right? If we're one or 2 degrees off

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Stephanie Bogan: over a little bit of time. No big deal over a year or 2 years, or 3 years, as we've all experienced right? We can get really off course and have to go back and do more work. So again, we're not gonna go through every section on the workbook. But that first section is really about getting your grounding. It's awareness and consciousness. What has happened, what is happening? What should we be aware of?

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Stephanie Bogan: What are our top? 3 practice goals?

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Stephanie Bogan: What are top? 3 professional goals? And what are our top? 3 personal goals? This is a great exercise to do with teams. If you wanna get feedback.

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Stephanie Bogan: if they all share practice goals, you know, you're really aligned. If they have random things right, you're gonna have to set priorities and create alignment around them. So this will help you go through your priorities. And the thing I think that's important here.

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Stephanie Bogan: Where's that section, Natalie. It's 30, 60, 90 days next year.

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Stephanie Bogan: Yeah. So as we talked about like, here are the the key sections. Natalie will walk you through these a little bit. And then I want to talk a little bit about how we can use this with your teams.

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Natalie Bergsma: Yeah. So setting up goals right getting clear on the metrics and kpis, and how you wanna perform for the year, and then keeping track of those on the quarterly basis. But I think the the most important part is getting focused right, particularly as we grow.

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Natalie Bergsma: There's lots of new shiny top objects that come in. There's a lot of business issues that

come up along the way. But, like, what are the the top goals? They're gonna move the needle and get us really where we want to go. If we go back to that vision planning. So both from a practice, a professional and personal goals, I think stuff you hit on this which we talked about is

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Natalie Bergsma: particularly as you begin to grow and delegate more separating out your professional development goals

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Natalie Bergsma: as a leader. Right? Where do I need to improve? To be a better leader, for my organization is different than I'd be. A better manager is different than where where do I spend my time in the business? So I see as firms grow, really focusing on leadership development becomes a key process there, but ultimately, like drilling it down. What are the top? 3 things that I want to do. And then each

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Natalie Bergsma: quarter breaking those down into priorities, and being really detailed about this, there's a lot of research and neuroscience says that

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Natalie Bergsma: if we're really clear on what our goals are, and we write that down, what do we need to do? Why is it important? What does success look like, what are the things that we're gonna be facing as we run into working these things? How do we prepare for them? Right? That's actually setting us up for success. If we say, here's the goal. And here are the actions that we're gonna need to take there, right those key steps and milestones that you see here, that's gonna increase your likelihood of success

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Natalie Bergsma: exponentially. Right? Because you're actually training your brain to say, Okay, I know what's next, where's what we're gonna do. And I think also, right roadblocks and challenges is is that planning in advance? So if we say, Hey, capacity might be a challenge for the team. Then you can sit down and say, How do we address

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Natalie Bergsma: that? And it might be, Hey, we need to outsource a function of this to someone else, or we need to bring in another team member to support it. So really, sitting down and mapping out and putting pen to paper on, what's the goal. But what are the things that I need to do to accomplish that goal?

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Stephanie Bogan: Yeah. And I think to Natalie's point, these questions, which seem trivial and insignificant, or actually some of the most part powerful parts of the process. If you ask your brain what resistance is gonna come up against me. And then you're like, Okay, I get that. Your brain will feel more empowered to address it versus getting 17 days in and then being like, Oh, I kinda need that's coming. But I didn't speak it if you will. So it's a very thoughtful exercise. This does not need to take 12 days.

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Stephanie Bogan: You can literally do this in an hour or 2. If you're focused and not distracted.

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Stephanie Bogan: The trick is when we get to these goal sections. This is where the team can be really valuable, right? You can do a draft and where your key stakeholders can. But when we get together and we say, Okay, what's it? Gonna take to execute on this priority. Now, we can be like, Okay, what are the key steps or milestones? Hey? We're gonna have to run the client list. We're gonna need to do the fee analysis right? Think about what you did with the client transition list right? Breaking it down, breaking it down, breaking it down where that gets really helpful.

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00:32:07.760 --> 00:32:18.790

Stephanie Bogan: These are all great conversations to have with the team. Once you've gotten to that point, the part I really like about this because it really does turn those big Charlie Brown want want ambiguous goals

154

00:32:18.920 --> 00:32:47.439

Stephanie Bogan: into right bite. Size. Things we can accomplish is if these are the priorities or goals for the quarter. What do? What should we have done in the first 30 days? What do we need to have done in the next 60 days. What? So it just really helps you and your team go. Okay, if we're gonna do right, we're gonna right size the client base right in the first 30 days we're gonna run the analysis. We're gonna run the fee report. We're gonna calculate XY or Z, right? And the next, we're gonna make decisions about clients and fees. Next 6, 30 days

155

00:32:47.440 --> 00:33:00.299

Stephanie Bogan: we're gonna build the model draft the scripts rate, get the meetings also like, get everything built out. Hey? Next 90 days we're gonna launch it to rate tranche one and practice that conversation on 10 clients

156

00:33:00.310 --> 00:33:04.410

Stephanie Bogan: right now we can really go. How do we take this kind of idea

157

00:33:04.690 --> 00:33:11.409

Stephanie Bogan: and and chunk it into a 90 day plan. And hopefully, what you see is now we can do that with the team.

158

00:33:11.990 --> 00:33:17.809

Stephanie Bogan: 18. What are the key milestones that we're going to need to accomplish? What's the 30 day? 60 day and 90 day?

159

00:33:17.900 --> 00:33:44.710

Stephanie Bogan: Then they get involved, which helps them to get invested again. If it's 2 or 3 people, it works just as effectively. If it's 20 or 30, right, it's just, it's a lot more efficient with 3 people than it is with 30. You don't necessarily need a full 3 day retreat but the idea is to go through this for each of the goal set, so that you are really clear of what your roadmap is for the quarter. If you have this roadmap and you've got time blocked in your calendar, you should make consistent and considerable progress.

160

00:33:44.710 --> 00:34:12.270

Stephanie Bogan: because consistency compounds. So the more we can teach the team, hey, this is how we evoke change in this firm. Right? We look every quarter we look at the goals, we make sure we're on track. We set the plan for the next quarter. We roadmap it over 90 days with key milestones and accountability. We get together once a week, every other week, once a month. You're gonna pick your meeting cadence. Now you're in a really good position to take the team with you, hey? We're on track, hey? We're not

161

00:34:12.270 --> 00:34:24.800

Stephanie Bogan: in larger firms, Liz, where you have more people. You might have right a manager or someone leading. But you might have different people tiff. And, Jared, we did this a lot. We had committees because we just needed to get people involved. And we needed to get stuff done.

162

00:34:25.190 --> 00:34:39.749

Stephanie Bogan: So really, I've talked with a number of you about this, but we can certainly focus on it. If anyone wants additional conversation is, there's a whole process where you shift into the driver's seat or the sidecar, and you teach your team

163

00:34:40.460 --> 00:35:09.359

Stephanie Bogan: how to sit there with their hands on the wheel and your foot on the gas in a way that you feel really good about. And again, it doesn't mean that they're taking your job as CEO. It means that we have a reliable process for affecting and managing change inside the firm, and that really helps to reduce the overwhelm, and that things are always changing because there's a really reliable, consistent process. We do this every quarter we sit down. We pick priorities, we road, map them right. We get together once a month.

164

00:35:09.750 --> 00:35:36.240

Stephanie Bogan: and then there are ways, Liz, you and I have talked about this a bit right? Or even John, with assistance, you can say to your team, here's let's let's have a meeting. I'm gonna drop a bunch of I call it idea storming. I'm gonna drop a bunch of stuff on you. We're gonna record it. You're gonna take that. You're gonna put a draft together or you're gonna run the first rate. Bring that back to me next week. We'll look at your progress right next set of instructions. So rather than doing a lot of the work wherever possible.

165

00:35:36.240 --> 00:36:03.710

Stephanie Bogan: These are wonderful opportunities to empower your managers, your right and or members of your team to really start to right drive the car for you, but you're right there, right providing the side seat or backseat, as my husband would say. Right, you're back seat driving. You're just teaching them how to use the process so that you're not always the one right pushing progress on the firm if that makes sense. And I know for a lot of us. That's the shift we get really excited about.

166

00:36:03.860 --> 00:36:16.469

Natalie Bergsma: Yeah, I think it's a good point to talk about managing the process versus being the visionary and leader who decides the priorities. One of the first things that's great to delegate it to your or to your business. Ops

167

00:36:16.480 --> 00:36:18.380

Natalie Bergsma: person is



168

00:36:18.400 --> 00:36:35.869

Natalie Bergsma: ex, you know, managing the process, doing the the nitty, gritty work of it, so that you can kind of elevate yourself up and out and focus on, you know, accountability and executing as opposed to, you know, being the person who schedules the meetings and sets up the things and sends out the forms.

169

00:36:37.520 --> 00:37:07.249

Stephanie Bogan: So once you've got that plan. You really can hand it off to someone right? And Alan Liz, your Ops manager, and say, Hey, I need you to run with this, and then our job is to lead them through executing on the process. So that ultimately, here's the really cool part. Someone else leads the process and you show up is the visionary. Right? So, Neil, 2 or 3 years from now you should literally right. The firm should have this really great process. You and Alan is leadership. Sit down and talk about it. But conceivably

170

00:37:07.250 --> 00:37:21.890

Stephanie Bogan: someone else could run and manage the process. And you show up as the visionary and say, Hey, here's my input. Right? And then that person takes it and runs with it. And as you get managers or coos, or directors of operations, those are the kinds of things that they should be doing.

171

00:37:22.740 --> 00:37:50.719

Stephanie Bogan: we've done this a lot with Michael and his uses something very similar to launch right the Eos traction process and over 4 or 5 years now, right, that person's gone from his Ea to literally right chief of staff, and ultimately right into a full on like director role, right running the firm, running the meetings. And that's really pulled his time so that he's able to mentor and grow. He, he! We joke that he hates managing. But he likes mentoring.

172

00:37:50.870 --> 00:38:13.290

Stephanie Bogan: And I think we're all kind of like that. Managing is like you have to deal with the problems. And why didn't it go this way? And I gotta fix it. Mentoring is let me give you guidance and input and feedback. That's gonna help elevate right your career and your contribution, and generally we get a benefit from that when we don't get a benefit from it. When we feel like it's not working, then we don't like to mentor, because then we have to go into manager mode.

173

00:38:13.680 --> 00:38:25.220

Stephanie Bogan: So the more that we create ownership at the team level, even again, in a small firm. It might be 3 people, but everyone will have responsibilities related to the plan. Each quarter

174

00:38:25.230 --> 00:38:36.080

Stephanie Bogan: doesn't mean it's perfect, doesn't mean we hit a hundred percent every time. Most firms don't. By the way, if you have a really good discipline process, 70% is the average in terms of goal achievement.

175

00:38:36.380 --> 00:38:46.730

Stephanie Bogan: So the idea is really to just put some structure. We, you know, we joke here that it could be a post it right with 3 things you want to do this year, and if you sat down with your team and that post it and said.



176

00:38:46.860 --> 00:38:55.780

Stephanie Bogan: What 3 things is it this quarter? And everybody got on board. And you said, How are we gonna do it? And you talked about it consistently, it would actually work quite well.

177

00:38:55.830 --> 00:39:00.599

Stephanie Bogan: So the challenge as firms get bigger is, we ultimately build a lot of bureaucracy in

178

00:39:00.860 --> 00:39:10.010

Stephanie Bogan: because firms get bigger and we don't have the level of autonomy and ownership. Now we're all a long way from being so big that that becomes an issue

179

00:39:10.180 --> 00:39:21.429

Stephanie Bogan: right tiff. And Jared have really dealt with that the last few years, and this is one of the things that we started. They had gone through so much change that we really sat down and said, Hey, we have to be responsible for how we change

180

00:39:21.440 --> 00:39:42.240

Stephanie Bogan: and the pace of change and managing change. You guys have to be responsible for getting on board and getting with the change. And right, really nice leadership conversations around, that is, they always have. And over a few years their managers are now actually managing versus bringing them all the problems to fix right? So the team is involved and invested, engaged.

181

00:39:42.250 --> 00:39:50.489

Stephanie Bogan: And it's just become part of the culture. We have these meetings every year. We have these meetings there. It like, it's literally just a part of the doctrine of how they operate.

182

00:39:50.820 --> 00:39:54.480

Stephanie Bogan: So the most important part is, we talk about all the time is just do something

183

00:39:54.740 --> 00:40:20.690

Stephanie Bogan: right. The one page plan a quarterly meeting with the team. If you're ready for a more robust process, let us know. Natalie's here. Natalie will be working with our leaders. If you guys recall, we change the leaders structures next year. So you get calls with me and practice and or mindset coach. So if you wanna dive into deep and be like, let's get the team. We're gonna build out a process or a comp plan, or whatever we can do that again. So

184

00:40:20.950 --> 00:40:22.999

Stephanie Bogan: But the idea is to start something.

185

00:40:23.050 --> 00:40:40.340

Stephanie Bogan: because once you start, you lay the track, and once you lay the track and you push the train back and forth across it right, the track will get better and smoother. It's the consistency piece. So I think, whatever the process is, it's creating a consistent and discipline process for change. You're gonna sharpen this off.



186

00:40:40.690 --> 00:40:58.109

Stephanie Bogan: You don't have to spend 2 days, every single quarter. You do need to have consistent time annually, quarterly, monthly. Ideally, this is the next level up from a leadership perspective. You really want to elevate your leaders. Here's the challenge. Meet with yourself once a week.

187

00:40:58.410 --> 00:41:04.879

Stephanie Bogan: So I was sharing with the group, or this morning that I have a client. He goes to Mcdonald's every Monday morning.

188

00:41:05.250 --> 00:41:16.239

Stephanie Bogan: No, I'm not saying it should be Mc Donald's. I was like, really, of all your helpful options, but he's like. It's my one thing, and I get my coffee and my egg, Mac Buffon. I go there at the exact same time before

189

00:41:16.410 --> 00:41:23.690

Stephanie Bogan: I hit the office, so it's just me and my notepad. So thank you. Guys, remember Jed's limitless life book from the beginning of the year.

190

00:41:24.190 --> 00:41:37.210

Stephanie Bogan: If you don't have one of those I would really encourage you. Alison can find one, and maybe we can put that in the leader's inbox. Actually, let's make sure we talk about. Then the vision call because we're going to do that really cool vision call. And that's a perfect way. It's a perfect place to insert it.

191

00:41:37.340 --> 00:41:50.510

Stephanie Bogan: so the goal is to make sure that we have a process, and we're honing it over time. We think we don't have time. Abe Lincoln. This is one of my great Abe Lincoln quotes, he said, if I had 5 min to chop down a tree

192

00:41:50.750 --> 00:41:53.340

Stephanie Bogan: I'd spend the first 3 sharpening my axe.

193

00:41:54.330 --> 00:42:19.579

Stephanie Bogan: We just don't do it as leaders. We just get so busy being in the business that it's really hard to elevate, he said. Look, no one's gonna bother me at Mcdonald's. There's no email. There's no one walking in my office. It's between my home and where I'm going. It's an hour where I just sit down and I check in, and it is a powerful discipline. Again, personally or professionally, all the science, all the research, all the studies show.

194

00:42:19.580 --> 00:42:26.939

Stephanie Bogan: If you check in, if you share, if you have a goal, your odds of achieving it are about 40%. If you check in with yourself

195

00:42:26.940 --> 00:42:43.640

Stephanie Bogan: on a regular basis, they go into the sixties. If you're in a group that has consistent



check ins, I aka leaders, etc. Your odds go up to between 80 and 90% of actually achieving those goals and effecting that change coaching and community really help

196

00:42:44.410 --> 00:42:54.100

focus on the essential few. We're not gonna over preach on this one. You guys get it by now. Every time you've tried to do 5 big things you might have gotten half of one of them done.

197

00:42:54.170 --> 00:43:08.479

Stephanie Bogan: We pick one big priority a quarter that tends to get done, and if we can fill in around it, then fantastic. But it's the rate our appetites are bigger than our our eyes are bigger than our stomach problem and consistency, which we've talked a lot about.

198

00:43:08.480 --> 00:43:24.789

Stephanie Bogan: So I really, today, what we want to do is just kind of level. Set around that, and then talk with you about your processes. What's working where you feel like there are gaps or opportunities. And then we, Natalie, I and your peers will spend the next.

199

00:43:24.820 --> 00:43:37.339

Stephanie Bogan: I think we're right on time 45 min or so, just helping really unpack that and work through it. So we can really dive into this topic and engage and collaborate Natalie, do you just wanna kick us off with some rip off and deploy.

200

00:43:38.010 --> 00:43:59.239

Natalie Bergsma: Yeah, I for me, it's getting really, this is about building a process around strategic planning. So every quarter. What's the agenda. How do you engage the team who's in? Who is involved and who isn't? That's gonna change as you grow right. If you're a lifestyle practice with a small team. Everyone's involved. And right now I'm working with the firm.

201

00:43:59.240 --> 00:44:19.049

Natalie Bergsma: and we're pulling people out of the process and only bringing in the key leaders in the organization, and they're kind of disseminating down. So when you think about that, as you grow, your processes change. That's a piece that you need to look at. How do you need to prepare for it? I think Stephanie's point is great, you know. Where do you need to spend time preparing?

202

00:44:19.200 --> 00:44:42.149

Natalie Bergsma: I had a leader asked me recently, like, well, I sit in the meeting with the team, and I do all the vision planning with him. And again I think that can work great. But his team sits there and goes, okay, like, where do you want to take this thing? And so my recommendation was, you need time before your strategic planning process to yourself to figure out.

203

00:44:42.580 --> 00:45:08.490

Natalie Bergsma: where do I want to go? What is this business need? Right? I'm the captain of the ship. I need to figure out which island or which country we're moving to next. And then you do the planning and the process and the agenda building and sharing those things out with the team. So really just getting that systematized and and pretty disciplined and at its best practice level. This is a workflow in your business that has someone else



204

00:45:08.560 --> 00:45:15.400

Natalie Bergsma: running, that I do that for some of the clients that I work with. It's right. They're not the ones driving the execution.

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00:45:16.810 --> 00:45:34.100

Stephanie Bogan: Well, I think a point that Natalie made there, and I think is a good way to kind of roll into conversation is, you know. How do you? How do you curate? A change management system? We call that business and performance right business planning and performance management. But it's really right? Right? A performance in progress

206

00:45:34.480 --> 00:45:43.800

Stephanie Bogan: system right like Miles on the car. Right? Are we moving from California to New York in the way that we want? So would love to just break out here a little bit and talk about

207

00:45:43.890 --> 00:46:10.090

Stephanie Bogan: what systems you each have, what's working like, where have where, what's worked in your firm to create more clarity, alignment, investment, ownership, accountability. And then, as you reflect on what your growth system right? What whether you're have one or gonna grow into one. What might you know, John, what does that look like for you currently? And you know, as you think about implementing this, what would it look like what challenges do you think you might face?

208

00:46:10.090 --> 00:46:16.199

Stephanie Bogan: What are the milestones you need to cover right to put it in practice, so we'll start there. Anybody want to kick off?

209

00:46:17.690 --> 00:46:39.659

Stephanie Bogan: Just go wild, random left to right Neil, you're the first advisor on my screen as I go from left to right. Can you share with the group? What you are doing is affirm now, any changes you've made that have been helpful. And as you think about this or the process. You have any gaps or outcomes that you'd like to solve for get help from the group.

210

00:46:40.100 --> 00:46:45.429

Neal Albritton, ChFC®: Yeah, and I'll make it quick, cause. I gotta leave real quick for the dog here shortly.

211

00:46:45.590 --> 00:47:02.969

Neal Albritton, ChFC®: We have followed that launch process and kind of blended it a little bit with Theos. Not much but so we definitely do like weekly action reviews with team daily huddles. We just started doing quarterly business reviews this year. I think our next one is scheduled for

212

00:47:03.050 --> 00:47:07.910

Neal Albritton, ChFC®: mid December, before we all go on break together. Just so we kick the

213

00:47:07.920 --> 00:47:19.330

Neal Albritton, ChFC®: 24 off on a good foot. So we've got those in place, and we follow the workbook

and a few other things. So we're doing it a little in a light capacity, not a very deep, because there's only 4 or 5 of us.

214

00:47:19.360 --> 00:47:47.140

Neal Albritton, ChFC®: And I think we've written down most of my notes for today where I need to focus on is I need to be doing a much better job of checking in with myself. On an ongoing basis, whether that's monthly or weekly as well as making sure that the blocks that I put on my calendar for those revenue producing activities, or that CEO time, I make sure that I actually stick to that and not let other things get scheduled on top of it.

215

00:47:47.380 --> 00:48:04.510

Stephanie Bogan: What any changes as you've implemented the Qvrs. Is that? How is that been helpful? Have you noticed? I again cause you don't have to do right a 2 day process each quarter. But if you found that that helps create clarity or alignment, or like what are the as you reflect on it? How is it been helpful to you?

216

00:48:04.780 --> 00:48:30.939

Neal Albritton, ChFC®: It's been helpful to us because it allows us to get a deeper dive into like our 90 day rocks. Essentially, what have we done for the last quarter? What are we gonna do for the next quarter? And how do those, both team and individual projects kind of layer on top of each other? So it just keeps pushing us towards the goal that we need. So we touch on that very, very briefly when we do our Weekly Action Review as a team. But having that Quarterly Business Review allows us to dive much deeper into it.

217

00:48:31.030 --> 00:48:44.659

Stephanie Bogan: So it might just be a function of right team check-ins between the quarters, right? It doesn't have to be every week. Maybe it's a once a month. right? Just a progress check in when when we know that something's coming up

218

00:48:44.780 --> 00:48:54.829

Stephanie Bogan: right. If we tell a client we'll get that to you, and we don't have any deadline that tends to be the thing we push. If the clients coming in on Thursday, right, if nothing else, by Thursday morning.

219

00:48:54.970 --> 00:49:04.279

Stephanie Bogan: I really need to get to this. So sometimes those check-ins can just help the team maintain their awareness of where they are progressing versus waiting 90 days. If that.

220

00:49:04.330 --> 00:49:25.069

Neal Albritton, ChFC®: if that helps, maintain momentum at all. Yeah. And the other thing that we've done, too, is we? We still do the financial component inside the Qbr. But after doing it for a couple of quarters, we realize we wanted more frequency with the financials. So Alan and I break out the financials just for a 15 min conversation once a month. Just so we're following the pulse a little bit faster.

221

00:49:25.070 --> 00:49:39.000

Stephanie Bogan: Yeah, I like particularly on your own, because you need that accountability. But if you have a partner or or write a manager level person a once a month meeting is a really good idea.



222

00:49:39.000 --> 00:50:04.360

Stephanie Bogan: not, you know, like every action item with the team, but to those performance metrics we talked about right as our client, our client numbers our marketing numbers and our practice numbers where we want them to be, so that you can write real time adjust. If you said you were gonna increase that average revenue per client, and you realize it's gone down because you made an exception. You may still make that choice. But now you're more aware of it, right? So you have

223

00:50:04.360 --> 00:50:24.280

Stephanie Bogan: less runway right to to stall along, I guess, is a good way to put it so I'm a big fan of, with, whether with yourself or a partner or another leader. A monthly check in on those numbers, because your financial and your marketing numbers are important, like 90 days in marketing could be a tweak that you made to your website 45 days and then got you another client.

224

00:50:24.330 --> 00:50:29.670

Neal Albritton, ChFC®: So I like to look at financial marketing data monthly if you can love that.

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00:50:29.720 --> 00:50:32.320

Natalie Bergsma: But also, I think is a good place to bring up

226

00:50:32.560 --> 00:50:43.310

Natalie Bergsma: issues right? That maybe more of a leadership level that you don't wanna talk about the team with, but having the like. What's what's stopping us? How do we solve for that, Neil, what do you

227

00:50:43.360 --> 00:50:56.630

Natalie Bergsma: think is having you resist that time? As CEO? I think that's really something to look at as you think about. Kind of that personal accountability is sort of what's the thing that's stopping me from spending time in that space?

228

00:50:58.120 --> 00:51:11.449

Neal Albritton, ChFC®: It's a good point. Yeah, so and that's just getting our next advisor up and running and still spending more time inside the client service role instead of just being more CEO visionary and growth focused.

229

00:51:12.430 --> 00:51:27.669

Stephanie Bogan: Well, you could also note that right? A priority is going to be training and mentoring junior advisor. And that might be what you do with some of that Monday time right? It's still, it's not a distraction if it's in fact, the priority.

230

00:51:27.670 --> 00:51:42.820

Stephanie Bogan: So that's where we tend to take on projects like getting our Cfp hiring an advisor. We were on with an advise this morning. He's in the middle of an Ra transition. He's like, what do you think my priorities are like? Well this quarter. Your only priority is Ra transition. And until that's done

231



00:51:42.820 --> 00:51:46.999

Stephanie Bogan: it's your priority every quarter. And he was like, I can do that. I was like, Yeah.

232

00:51:47.010 --> 00:51:49.400

Stephanie Bogan: he really can't do that

233

00:51:49.490 --> 00:51:57.469

Stephanie Bogan: like the business has needs. So when things come up we've had people like, you know, they get sick right, or you need more time off

234

00:51:57.550 --> 00:52:13.550

Stephanie Bogan: that priority. That quarter is running the shop on right, unlimited staff or capacity. Right? So we just don't tend. We tend to decide. We wanna do things. But I think to Natalie's point, we don't always align time, energy, resources, and capital like truly align them

235

00:52:13.800 --> 00:52:27.530

Stephanie Bogan: with what we need to do, and I think the weekly meetings are great, you know, and if you and Alan can just check in, continue to check in monthly you're right. It you just creates a lot more awareness which in turn creates a lot more accountability. So I love that you're doing that.

236

00:52:29.620 --> 00:52:37.649

Stephanie Bogan: But yeah, to Natalie's point like, make sure that time is priority time. Even if that priority right? It happens to be training someone

237

00:52:39.180 --> 00:52:48.489

Stephanie Bogan: awesome. Thank you for that. Appreciate the feedback. John, how about you? What what kind of system do you have in place? Any wins and challenges you want to bring to the group?

238

00:52:49.640 --> 00:52:53.250

John Rojas: Making a lot of progress on my

239

00:52:54.410 --> 00:52:58.660

John Rojas: practice benchmark. It's

240

00:53:00.140 --> 00:53:06.069

John Rojas: It's been a. It's been an interesting journey getting that thing figured out, but I'm pretty much there with it.

241

00:53:06.400 --> 00:53:16.070

John Rojas: and I have my daily huddle with with my team. So every every morning at 9 30 we have a daily huddle. Every Monday we have our weekly team meeting.

242

00:53:16.530 --> 00:53:26.000

John Rojas: My staff has been drastically reduced to just Leslie, so everyone's kind of doing their own



thing now, which has been great. It's given me a lot of capacity to clean things up.

243

00:53:26.260 --> 00:53:37.280

John Rojas: I haven't been I I'm glad I found that, you know, came across that Qvr. Again, cause I'm doing planning for next year. and it's a

244

00:53:37.400 --> 00:53:46.300

John Rojas: I like the layout, and that I don't think I've ever come across it down there before, even though I know I've done that module before, but everything for me is

245

00:53:46.870 --> 00:53:51.630

John Rojas: just taking my numbers and really trying to understand them. So I went through my quick books and

246

00:53:51.750 --> 00:53:54.929

John Rojas: and broke down my quick books into

247

00:53:55.270 --> 00:53:57.860

John Rojas: an excel visual that makes sense to me.

248

00:53:58.100 --> 00:54:02.750

John Rojas: so that as I'm as I'm entering things into the the spreadsheet for limitless.

249

00:54:03.100 --> 00:54:07.350

I have a pretty good idea of what I want to answer. Why, it makes sense, and I think that

250

00:54:07.680 --> 00:54:10.529

John Rojas: last year I really didn't, didn't

251

00:54:11.160 --> 00:54:14.319

John Rojas: put a importance to that at all.

252

00:54:14.350 --> 00:54:22.380

John Rojas: and it kind of just got away from me. And and the new version of myself is like, I can't imagine scaling a company growing

253

00:54:22.400 --> 00:54:28.329

John Rojas: at any capacity, whether it's marketing or adding team members without being that dialed into my financials.

254

00:54:28.880 --> 00:54:29.850

John Rojas: And



255

00:54:30.090 --> 00:54:39.570

John Rojas: it's a learning curve. It's like you can do the modules and all that. But until you actually go through your quick books and like, make a commitment to understand what it all means

256

00:54:40.060 --> 00:54:41.430

John Rojas: you

257

00:54:41.610 --> 00:54:46.630

John Rojas: You just don't know what you don't know, and you won't appreciate what you're gonna pick up

258

00:54:46.670 --> 00:54:51.650

John Rojas: by just going into the trenches and really digging down into it. And so

259

00:54:51.860 --> 00:54:54.829

Natalie Bergsma: I think you've taken a really great step in

260

00:54:54.840 --> 00:55:18.589

Natalie Bergsma: what I think most business owners don't recognize is that the way we structure our Pn. Ls is not actually a really great way to look at the numbers and the data for how we run our business. And so what I call normalizing the PnI to the business model is right and advisory firms. Where are we spending on direct expenses, advisory compensation, right? Those revenue producing activities.

261

00:55:18.590 --> 00:55:30.260

Natalie Bergsma: And how are we breaking down our operating expenses and our team costs and and turning those things into something that actually helps you with planning? Do we have room for another advisor, do we? Wanna.

262

00:55:30.360 --> 00:55:48.270

Natalie Bergsma: you know, decrease profit, margin by 5 to create and plan ahead for capacity? It's time to hire that next person. So I think that's a really critical step, John. And yeah, it definitely takes some learning and and adjusting, because I think people have tendency to measure to these. You know, industry bench benchmarks.

263

00:55:48.270 --> 00:56:01.600

Natalie Bergsma: and it's a great framework. And yet your business is gonna be very different than the typical industry benchmark based on your services, your ideal client, how many? How you structured your team?

264

00:56:01.650 --> 00:56:09.959

Natalie Bergsma: So if you haven't yet, the next step is looking at, what are the what are the? How do I set goals to the new numbers that I've created, that I'm understanding?

265

00:56:10.560 --> 00:56:12.039



John Rojas: Yeah. And, Jeff, you.

266

00:56:12.060 --> 00:56:20.229

Stephanie Bogan: John, you've gone through a lot what I call shifting from right. We tend to look at financials in the rear view. Oh, look! That's what happened.

267

00:56:20.360 --> 00:56:36.519

Stephanie Bogan: And now I think and I would love for you to share a little bit about that with the group and how it's helped you. Right? You're much more forecasting. Now you're using that data to decide what is and isn't okay. What needs to change and what you will or need to do in the future. Is that a fair

268

00:56:37.040 --> 00:56:38.500

Stephanie Bogan: characterization?

269

00:56:38.590 --> 00:56:50.250

John Rojas: Yeah, it's 100% fair. The part that that that no one can help you out with is actually going through it like you, you have to

270

00:56:50.470 --> 00:56:52.289

John Rojas: go through it enough

271

00:56:52.610 --> 00:56:56.059

John Rojas: until you can put it into. It's like a puzzle, right?

272

00:56:56.140 --> 00:57:01.209

John Rojas: You gotta build it into a module that works for you like I can look at what I created now.

273

00:57:01.230 --> 00:57:09.770

John Rojas: and have a pretty good idea of what happened so far. Year day. What happened for the quarter? What's going on for the month, and what's going to happen for the rest of the year?

274

00:57:09.900 --> 00:57:11.289

John Rojas: But it took like.

275

00:57:11.650 --> 00:57:23.929

John Rojas: I don't know. Liz Liz knows, you know. I mean. It took hours and days, and like I mean, I've been on this conversation now for a month since July right? And been like like a madman. And so

276

00:57:24.170 --> 00:57:48.540

John Rojas: once you get there, it's it's really awesome, because then you'll have something that actually makes sense to you. And what I'm learning is that quick books is one thing, and you're gonna have someone who're gonna do your books the way they think that your books that should be done because you're not giving them the input that they that they require from it's not like they don't want to do them that way for you. You just haven't given them any guidance, so they're doing it the way they think you



want it.

277

00:57:48.600 --> 00:58:09.799

John Rojas: when in reality, when you started looking into it, you're like, I don't want that there. So I'm not gonna I'm not gonna go back and and kind of redo what? What has already been done? That's like spilled milk right? I was looking at 2022, and I was like, Oh, my God! What in the world happened like 2022 is like, I can't believe I did my taxes with that mess

278

00:58:09.800 --> 00:58:26.820

John Rojas: right? But for 2024 tomorrow we're gonna have a pretty in depth conversation on what I want her to do moving into 2024, and what she needs to do to prep for 2024. Here we are in November. She's got a little bit of time to make sure she gets things cleaned up for the new way we're gonna work things.

279

00:58:26.950 --> 00:58:31.049

John Rojas: I will never make a decision again without putting it into my dashboard

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00:58:31.350 --> 00:58:33.220

John Rojas: about anything about

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00:58:33.270 --> 00:58:45.600

John Rojas: I didn't make a decision with limitless last time you and I talk because I'm like I gotta get my dashboard figured out and make sure that my my matrix are correct. Good news is they are. But

282

00:58:45.750 --> 00:58:55.790

John Rojas: yeah, it's super super super important. And for those of you who this is resonating with you. May you may reach out 6 months and be like, Wow, I get what you mean now.

283

00:58:56.970 --> 00:59:08.830

Stephanie Bogan: Well, yeah, you get like your I think the conversation like you feel armed with information, and you use that information to rate. Govern yourself in the business, which is very different than waking up and freestyling it like Oh!

284

00:59:09.140 --> 00:59:30.909

Stephanie Bogan: And then we look in the rear view mirror and we go. Oh, those were the results. And we tend to. This, I think, is where John has really done a great job, Liz. I know you've done a lot of work. Melissa is not online today. She's done a ton of work here across her teams and offices over the last year, because she was in a very similar position. As we look at the result in the aggregate, and we go, good or bad, or somewhere in between.

285

00:59:30.910 --> 00:59:52.969

Stephanie Bogan: But it's an aggregate, which means it's really hard to peel peel back the layers, unpack it and be like. Now. John and I were having a conversation where it was like. All right, what do we need to account for this much went here, this much went there. How much do we want that to be? How much do we need to grow to get ready for that next advisory like? Now we're having a really informed business conversation



286

00:59:52.970 --> 01:00:02.430

Stephanie Bogan: based on right sound understanding of the financials and the impact of those decisions which that makes it a lot easier. Right? We always joke that you can't manage what you can't measure.

287

01:00:02.830 --> 01:00:24.969

Stephanie Bogan: so we try not to look at financials as an aggregate rear view dashboard as much as right, a present day tool that great tells us where we are on course, and is really forecasting our financial success in the future, so that we can proactively pivot and change plans or adjust based on to Natalie's point. We know when we're gonna have client capacity issues, we know when we're gonna have

288

01:00:24.970 --> 01:00:38.720

Stephanie Bogan: advisor issues or team can like, we can predict that with really great reliability if we've got that data. So John, great job, really appreciate the shares just around how that's really kind of shifted the way you look at the business and make decisions.

289

01:00:38.730 --> 01:00:42.970

Stephanie Bogan: That's the discipline shift that we talk about. It's really important.

290

01:00:43.390 --> 01:00:44.200

John Rojas: Thank you.

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01:00:44.420 --> 01:00:51.040

Stephanie Bogan: Liz, how about you? Where are you with planning and performance management? And what kind of what are wins and challenges?

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01:00:51.950 --> 01:01:02.770

Liz Hand, CFP®: So we have our strategic planning meeting. We do an annual cadence of that coming up next week and the week for this week and next week. So smaller group this week.

293

01:01:03.360 --> 01:01:15.779

Liz Hand, CFP®: and then the whole team next week. But piece that I am taking from our conversation today is I'm always like I always hear that conversation about buy-in getting team buy-in.

294

01:01:16.120 --> 01:01:28.300

Liz Hand, CFP®: and I have defaulted to. That's the brainstorming place where I like to live. and it sounds like that doesn't need to happen. So Clinton and I were having a conversation this morning about how

295

01:01:28.320 --> 01:01:36.950

Liz Hand, CFP®: he wants to remove brainstorming from the strategic planning day with the whole team. And then we're talking about this week's meeting.

296



01:01:37.310 --> 01:01:44.179

Liz Hand, CFP®: And I was like, well, brainstorming has to happen sometime like gotta get that some. And I'm just realizing now, like brainstorming happens with me.

297

01:01:44.420 --> 01:01:53.680

Liz Hand, CFP®: and then I am bringing it and putting in some of the the key pieces that I'm taking away. It just feels so directive for me in a place where

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01:01:53.940 --> 01:01:58.600

Liz Hand, CFP®: I need to continue to feel that comfort of

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01:01:58.700 --> 01:02:05.079

Liz Hand, CFP®: hierarchy and and the fact that employees are desiring that so

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01:02:05.610 --> 01:02:09.089

Liz Hand, CFP®: those are the key pieces.

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01:02:10.800 --> 01:02:18.559

Stephanie Bogan: What would that look like when you think about putting that that shift in place? What what do you think that would look like, what would you do? Different?

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01:02:19.200 --> 01:02:22.090

Liz Hand, CFP®: Which shift brainstorming on my own? Yeah.

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01:02:22.520 --> 01:02:49.559

Stephanie Bogan: like, it is the idea to bring it as we talked about right? I think you had just joined, or it was right before, you know, especially in a larger firm. You may not sit there and open yourself up to, what does anyone think about anything on any given day cause? Then you gotta spend a little energy. And again, it depends on your culture and your people. If half the people are like, kinda okay and half are on board. If you've got 3 people and everyone's on board, it's gonna be a different kind of conversation.

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01:02:49.570 --> 01:02:56.090

Stephanie Bogan: And so that's where it is. Okay to have what we call a democratic dictatorship.

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01:02:56.330 --> 01:03:09.189

Stephanie Bogan: And what I mean by that is, you can see the ideas which is hey? You know, Clinton and I sat down. We brainstorm right? We reflected on the vision of the firm. It remains the same. Or here's the updated version

306

01:03:09.340 --> 01:03:38.760

Stephanie Bogan: would love to get feedback. Does this like, now, we're just in Feedback land. It's not, hey, go craft a brand new vision. It's actually that's great. What about you know? Being a best place to work or something? Oh, okay, well, like, we'll reflect. You don't have to say yes or no in the meeting you can say it's great feedback. We'll reflect on it. You can say, what is that great? So you can decide in the



moment. But I think one of the things we sometimes worry about is right, that we have to say yes to all their feedback, or include all their feedback, and we want people to feel involved.

307

01:03:38.760 --> 01:03:45.279

Stephanie Bogan: But it's Oh, it's also okay to say, Hey, really appreciate that. Let's have a conversation about what it would take

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01:03:45.400 --> 01:03:58.719

Stephanie Bogan: right, and then you can do a quick brainstorm there, or you can say, Hey, that's something, Clinton. And I really need to think about what will be required to execute. Let us put that on the list, and we'll come back and bring that to the group, or bring that to you for feedback. When we get closer.

309

01:03:58.740 --> 01:04:05.010

Liz Hand, CFP®: So a lot of times, especially with teams where you're kind of seeding the agenda, it's here's the vision.

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01:04:05.300 --> 01:04:23.700

Stephanie Bogan: Here's goals, we, you know. Here's you know, our leadership meeting. Here's what we framed out. Draw that on a slide or a whiteboard. What do you guys think? Right? So you can take 15 or 20 min. It doesn't have to be 3 h to say, because what we want them to do is have a chance to look at it. Here's the really important part, and not reject it

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01:04:23.730 --> 01:04:28.549

Stephanie Bogan: silently or otherwise. Because if they say, Hey, yeah, those make sense.

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01:04:28.790 --> 01:04:39.599

Stephanie Bogan: Don't have anything else that is implied consent right, and that overtime becomes investment. The more involved they are in the process, the more invested they become.

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01:04:39.630 --> 01:04:50.729

Stephanie Bogan: So that's where you can look at. What are anchors right here? Things we want to share with feed, you know, and open up to feedback is very different than a brainstorming session. To say.

314

01:04:50.840 --> 01:04:53.509

Stephanie Bogan: what do you all think the top priorities are?

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01:04:53.670 --> 01:05:21.779

Stephanie Bogan: And you can do things at scale where you get feedback in a contained environment. You can do surveys right, hey, everyone! What do you think the top 3 wins were for the year, the top 3, you know things we need to solve, for in your department across the firm. And if you see a lot of consistent feedback you're like, Oh, this is probably gonna come up. If you see a lot of random feedback. You can consolidate that and then bring it to the group and say, Hey, in the you know, we asked, you guys what you thought, here's what you came up with.

316



01:05:22.030 --> 01:05:35.430

Stephanie Bogan: Let's spend 30 min brainstorming around this. So I think you can. You can lay the track really confidently, that you're framing out the vision and the goals, and probably pretty directionally priorities. But then open that back up to feedback.

317

01:05:35.540 --> 01:05:56.070

Stephanie Bogan: So the team has an opportunity to think about? What will it take? What are the milestones where we capacity? Wise? Right? What are the what are the challenges we would face? That's the conversation that helps evoke investment. Even if they're like, we hate it. It's awful. It's not gonna work. Then, at least you know, their initial response to it is. And you can say.

318

01:05:56.070 --> 01:06:07.810

Stephanie Bogan: Okay, that's fair feedback. Let's continue the discussion. And right when when we're done, Clinton and I will ref, you know, review all of this and come back to you guys with the plan or have some follow up meetings to get a little bit more clarity around things.

319

01:06:07.820 --> 01:06:21.029

Stephanie Bogan: So I think you can feel okay, being directive, open it up to a democratic conversation. But it's still a dictatorship said with great love, because you ultimately do have to make the decision.

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01:06:21.280 --> 01:06:22.070

Liz Hand, CFP®: Yeah.

321

01:06:22.140 --> 01:06:51.959

Natalie Bergsma: you're the leader. 2 things that I do tactically here to help in this process as a function of team professional development, or even separately before I do the brainstorming and leadership work. I send out a survey to the team, or I talk in their one on ones like what's working. What's not working? What do you think could be improved in your role? Do you have any ideas for the business? So we're soliciting feedback before leadership needs, so that you can kind of aggregate that and then put it into buckets.

322

01:06:51.960 --> 01:07:06.739

Natalie Bergsma: It also helps you in another way, which is, if something's not big enough, or an important enough for the firm as a whole to take on a strategic initiative. People, then, can take individual ownerships over this thing. So we had a team member in a meeting. She came. You know, she said.

323

01:07:06.740 --> 01:07:23.850

Natalie Bergsma: I think that we should change our birthday process like we have multiple advisors now, and only one person signs the birthday cards, and that seems weird in an ensemble. It's team structure. And we were like, that's great. We love that idea. It's not a team again. This is not a big thing. Do you wanna take ownership over that?

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01:07:25.190 --> 01:07:51.300

Natalie Bergsma: And she was like, Oh, yeah, It would totally do that. So it became a goal for them to take ownership over. We had another team member who wanted to create a getting to know you process for the whole team and kind of be the cultural leader in the organization. Another example of



great. Go run with that. But no, it's not like this big strategic initiative. So getting feedback before you meet. And then I literally separate out a leadership meeting

325

01:07:51.380 --> 01:08:10.669

Natalie Bergsma: and a team meeting. And the structure of those meetings is exactly what Steph said. One is for where are we going? What are we doing? We're the captains, the other is, hey, what do you guys think, where are the roadblocks? What's that piece? And then, after that meeting, you do say, Hey, we're gonna take all the feedback and give you the finalized plan.

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01:08:10.970 --> 01:08:12.850

Liz Hand, CFP®: And who's gonna own? What

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01:08:12.900 --> 01:08:21.869

Natalie Bergsma: in that plan, or what working groups are gonna own? Which piece of it? And it's simply you get bigger and bigger. And you can't involve everyone

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01:08:21.890 --> 01:08:27.889

Natalie Bergsma: in the process unless you're using a very different, very different model. And you have to have really

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01:08:29.260 --> 01:08:42.020

Natalie Bergsma: people who really want a lot of ownership, and I find, as you grow, staff don't always want a whole lot of ownership. Your client service person doesn't necessarily want to do big strategic projects like just would like to do my job. That would be great.

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01:08:42.330 --> 01:08:43.090

Liz Hand, CFP®: Yeah.

331

01:08:44.210 --> 01:08:57.169

Liz Hand, CFP®: It reminded me that. the other piece, one of my. I was talking to Clinton about a potential kpi that we have next year is meetings kept

332

01:08:57.529 --> 01:09:09.669

Liz Hand, CFP®: because notoriously this year we have set up meeting cadences, and then, Kadam, when someone was like, Oh, this isn't working, or people weren't showing up, or whatever. So it

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01:09:10.140 --> 01:09:12.260

Liz Hand, CFP®: that continue a place for feedback.

334

01:09:12.450 --> 01:09:16.839

Liz Hand, CFP®: but intentionally creating some time during our strategic plan

335

01:09:17.120 --> 01:09:28.580

Liz Hand, CFP®: to address that and say, like what? What constructs the good meeting, and I think that



was coming out of a call with Stephanie as like a follow up item. Or maybe it's my mastermind. I can't quite remember somewhere here.

336

01:09:28.680 --> 01:09:30.029

Liz Hand, CFP®: But yeah.

337

01:09:31.450 --> 01:09:55.440

Stephanie Bogan: well, and then it goes to okay. Team. What will it take to write? Improve meeting consistency where the like? Hey? Let's. This is where brains like, what are the reasons? Right? What are the top. 5 reasons. This keeps happening. Boom, boom, okay, what can we fix? What can we? Now, you notice just through the conversation? It's okay. Ca, you know, can we fix that process? And that's where I think you can take rate 30, 45 min depending on the topic and say, Okay, we're gonna share the vision.

338

01:09:55.460 --> 01:09:59.300

Stephanie Bogan: Here are the practical issues or practice issues we want to talk through

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01:09:59.360 --> 01:10:11.520

Stephanie Bogan: right. And you can have an open session for, hey? Did we miss anything. But for the most part you're not gonna get 9 people jumping up and going. Oh, yeah. Oh, yeah. Oh, yeah. You forgot about all of these things

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01:10:11.580 --> 01:10:24.980

Stephanie Bogan: and Natalie's point. The follow up is very valuable, so it's good to have a team meeting on the back end and then say, Hey, here's what we came up with. You guys have any feedback? Great, we'll meet with you. And then to Natalie's point around performance development.

341

01:10:25.080 --> 01:10:44.860

Stephanie Bogan: the next step of that process as the firm gets larger when you're smaller, this doesn't exist, but as you get larger it becomes, how do those goals that we set and priorities we have for the firm for the year. Translate into department goals and individual goals. So if our goal is to grow revenue and you're the head of operations

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01:10:44.900 --> 01:11:04.360

Stephanie Bogan: right? Where can you effect change there? Where can you not? To your point? Or maybe we can create operational gains right? Which drive productivity, which is that capacity for revenue. So we try to take the firm goals. Look at groups when you have larger groups or practice areas. If it just right, you've got marketing operation staffing, even in a small, small firm.

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01:11:04.380 --> 01:11:09.729

Stephanie Bogan: And then how does the plan affect each of those areas? And how can we track progress against those as well.

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01:11:10.530 --> 01:11:26.350

Stephanie Bogan: and then that ultimately informs what everyone's goals are next year, like, Hey, like, hey? In order to advance my career. And we have this priority. This would be a great course for me to take, or I could build out this processor. So that's where you can start to connect the dots



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01:11:26.380 --> 01:11:47.290

Stephanie Bogan: between the goals, to the groups, to the individuals like the managers, should sit them down with their team and say, Hey, these are the department goals or the firm goals. What are the things we can do to effect? Change here? What are our department priorities? Right? Cause you're not necessarily gonna do that in the big group meeting, and that's where Liz Tiff and Jared did a bunch of committees.

346

01:11:47.330 --> 01:11:57.370

Stephanie Bogan: because great, we don't have a bunch of people just sitting around with free time. But everybody had a little bit of time to focus on areas, and that really help people get involved and invested

347

01:11:57.580 --> 01:12:08.059

Stephanie Bogan: right. And then they kind of shepherded it through the process to to our conversation to kind of get the outcome they needed to make sure that they got while still allowing people to kind of participate in the process.

348

01:12:08.810 --> 01:12:14.549

Stephanie Bogan: Because again, sometimes we have to just be like, yeah, that's not gonna work. We're gonna need to do it this way.

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01:12:14.630 --> 01:12:21.259

Stephanie Bogan: But I love that you're putting that process in place. How often are you reviewing? Are you in Clinton sitting down and reviewing

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01:12:21.700 --> 01:12:26.250

Stephanie Bogan: priorities and numbers quarterly. Or are you putting that in place as you look at next year?

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01:12:27.030 --> 01:12:31.250

Liz Hand, CFP®: It's been sporadic this year. We've been trying to go for monthly

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01:12:31.410 --> 01:12:37.770

Liz Hand, CFP®: One note that we made was during our review season.

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01:12:38.190 --> 01:12:49.880

Liz Hand, CFP®: Our meeting was at an awkward time that we wanted to get client meetings in, and so we had removed it entirely from the schedule. And then that created several breakdowns. So we're now meeting every Monday. Okay, great.

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01:12:50.330 --> 01:12:51.719

Stephanie Bogan: You find that helpful

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01:12:52.360 --> 01:12:56.909

Liz Hand, CFP®: today it was great first time. Awesome.

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01:12:57.240 --> 01:13:03.430

Stephanie Bogan: Anything you need wanna solve for account for you feeling pretty good so far. Awesome.

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01:13:03.910 --> 01:13:07.570

Stephanie Bogan: Love it good to hear it, Leah. Cute puppy!

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01:13:07.660 --> 01:13:11.319

Stephanie Bogan: Happy time! It's doggy day here at limitless.

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01:13:12.890 --> 01:13:26.170

Stephanie Bogan: Alright, Leah. Travis, you and Leanna. We're how are you guys applying or not? Again. No pressure business planning and anything you want to share with, or I get support from the group line.

360

01:13:26.910 --> 01:13:29.009

Liana Poodiack: Yeah, so

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01:13:29.330 --> 01:13:37.900

Travis Poodiack: we do. Do annual business planning. We have our fiscal Year End meeting in September. Cause our

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01:13:38.360 --> 01:13:42.449

Travis Poodiack: fiscal calendars just weird.

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01:13:42.520 --> 01:13:48.419

Travis Poodiack: I'd say. Me and Leanna probably over the coming weeks into December, will.

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01:13:48.600 --> 01:13:58.110

Travis Poodiack: you know, kind of start looking at next year. I mean, our. Our big thing, you know, is obviously going to be the transition to our own Raa. So that's

365

01:13:58.350 --> 01:14:05.229

Travis Poodiack: I mean, you're gonna be kind of an all in all consuming, you know, business planning objective. This year it played

366

01:14:06.350 --> 01:14:18.320

Travis Poodiack: a a still large part. But you know there are still kind of other things that that we were trying to push the ball ahead on. historically, we haven't done Qbrs.

367

01:14:18.740 --> 01:14:22.820



Travis Poodiack: That is something, you know, once we're in this new state, and we have.

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01:14:23.120 --> 01:14:33.399

Travis Poodiack: you know, full control, full grasp over of all those business lovers. That's something that I see important. And really, I'd say.

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01:14:34.090 --> 01:14:41.290

Travis Poodiack: you know, big. I want to get a better handle on kpis

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01:14:41.500 --> 01:14:52.969

Travis Poodiack: and stuff like that. Obviously, some of the things will be more relevant in the future state as far as some of the tools that we're using or have historically used.

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01:14:53.070 --> 01:15:00.589

Travis Poodiack: I'd say we've been doing Eos light we do use a a software solution to

372

01:15:01.210 --> 01:15:13.160

Travis Poodiack: coordinate all of that for us. That's the tool that we kind of launch our meetings in. I like it just because it's one spot for us to kind of keep track of.

373

01:15:13.970 --> 01:15:21.320

Stephanie Bogan: you know, all of those elements? Is that the Eos software, or something different?

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01:15:21.370 --> 01:15:27.980

Travis Poodiack: Yeah. So we were using the the Eos software from like the

375

01:15:28.220 --> 01:15:32.560

Travis Poodiack: the ones that created Eos probably 5 years ago.

376

01:15:32.940 --> 01:15:37.269

Travis Poodiack: Then we found an alternative called 90,

377

01:15:37.500 --> 01:15:48.119

Travis Poodiack: like the number and I actually liked that more. I found it. It was a better tool than what we were using. I haven't checked out.

378

01:15:48.850 --> 01:15:52.700

Travis Poodiack: The Us. Company's like new revamped tool

379

01:15:52.940 --> 01:16:00.190

Travis Poodiack: but I mean for us. We're a team of 3, and and the pricing I in all honesty, the pricing that we're able to get for 90 was like



380

01:16:00.520 --> 01:16:03.429

Travis Poodiack: way less expensive than we're paying

381

01:16:03.440 --> 01:16:14.139

Stephanie Bogan: the the original tool that we found. So that was probably the primary reason.

382

01:16:15.570 --> 01:16:19.940

Travis Poodiack: 3 years we were using the other tool for probably about 2

383

01:16:20.350 --> 01:16:29.910

Travis Poodiack: really like it. I think you know it saves me the hassle of having to create spreadsheets and all of this kind of stuff

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01:16:30.110 --> 01:16:32.690

Travis Poodiack: and I think I mean, I think we pay like

385

01:16:34.290 --> 01:16:39.570

Travis Poodiack: I think it's under \$30 a month. I think it's something like \$15 a month for 3 seats.

386

01:16:39.850 --> 01:16:55.530

Stephanie Bogan: Oh, that's great. Yeah, we'll check it out. I haven't heard of that one, but we're always looking for it right? Anything that can create a system and maintain the system for you is a good thing to invest in. So we'll definitely highly recommend looking at it. Awesome nineties. Is it like ninetycom

387

01:16:55.620 --> 01:17:20.800

Travis Poodiack: 90

388

01:17:21.340 --> 01:17:31.840

Travis Poodiack: in the new State? I am wanting to get the team more engaged in a sauna. I myself am still having to kind of get my head wrapped around it.

389

01:17:32.080 --> 01:17:39.740

Travis Poodiack: you know, and I know there's a lot of more knowledgeable experts out there that can kind of set up various things in Asana.

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01:17:40.040 --> 01:17:43.569

Travis Poodiack: So yeah, before I kind of roll that out to anyone

391

01:17:43.990 --> 01:17:46.220

Travis Poodiack: on the team, I kinda got to get

392

01:17:46.320 --> 01:18:03.190



Natalie Bergsma: my understanding a little increased. Yeah, it's always a challenge. You've got your Crm in the tasks and other tools, right? So that's about kind of consolidating and focusing. And do what works right. So don't necessarily abandon a tech that's working really well for you

393

01:18:03.190 --> 01:18:27.039

Natalie Bergsma: in trade for another one, unless there's a really really good reason for it now. And they're building that out a lot. So compared to the Crms.

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01:18:27.520 --> 01:18:31.259

Natalie Bergsma: Really great benefit of using that tool.

395

01:18:31.320 --> 01:18:33.479

Stephanie Bogan: Yeah, it's integrated, which is awesome.

396

01:18:33.560 --> 01:18:38.030

Stephanie Bogan: Well, good Leah, anything you want to add around the business planning process.

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01:18:39.730 --> 01:18:45.990

Liana Poodiack: just that. We are full year ahead. Now, Travis is

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01:18:46.100 --> 01:18:49.919

Liana Poodiack: back to work officially this week, so

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01:18:50.030 --> 01:18:56.599

Liana Poodiack: he's got a lot on his plate. So he's gonna start cracking the whip for Alexis and I, where

400

01:18:56.630 --> 01:18:59.170

Liana Poodiack: doing a lot trying to get our

401

01:18:59.200 --> 01:19:01.720

Liana Poodiack: kind of records.

402

01:19:02.040 --> 01:19:12.469

Liana Poodiack: up to date. Make sure they're accurate so that when we start building out, some of the other things are transition. We've got good data for that. So

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01:19:12.480 --> 01:19:35.719

Stephanie Bogan: it is, it's one of those things you go so long without it. And then when you start talking about it and hearing about it and looking at it as John is done. And Liz is done, and Melissa's done. You're all now in the process of really right now, all of a sudden, it's like, Wow, I can't really imagine running my business with. If I said to John, I'm gonna take your financials back to square one, and you're gonna run that business. He'd be like

404



01:19:36.660 --> 01:19:51.629

Stephanie Bogan: not gonna not gonna do it. So I know you're in the middle of the messy middle or the beginning of the messy middle, as you do transition. But pulling in those technologies right? Having agency over your data so that you know what you've got will be, I think, a a big.

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01:19:51.650 --> 01:20:02.629

Stephanie Bogan: a big win for you guys as you make that shift next year. And again we get there. Let us know right? We've got the tools, spreadsheets, all the stuff. But square one is, get yourself in a place where you have control over your data

406

01:20:02.780 --> 01:20:10.370

Liana Poodiack: right? I guess my next biggest thing for me is to think about compensation. You know, in this new space.

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01:20:10.690 --> 01:20:20.350

Liana Poodiack: how does the whole compensation structure work. You know, paying our assistance is easy. That's that's an easy thing. But how do we set things up as far as

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01:20:20.380 --> 01:20:30.119

Liana Poodiack: myself and Travis and the business, and you know, running it as an Llc. And all of that stuff. So that would be, I think, something that

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01:20:30.320 --> 01:20:35.959

Liana Poodiack: you know, starting the last part of this year into the beginning of next year. We're gonna wanna.

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01:20:36.090 --> 01:20:45.980

Liana Poodiack: you know, get a good handle on that, because we're thinking of transitioning. You know, mid mid mid mid to end of April beginning of May at at some point during that timeframe. So

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01:20:46.830 --> 01:20:47.989

Liana Poodiack: help with that.

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01:20:49.030 --> 01:20:54.070

Stephanie Bogan: Well, good. Yeah, we're gonna be. I think it's the March retreat. But I have to double check

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01:20:54.120 --> 01:21:13.169

Stephanie Bogan: what we're calling gross strategy for staffing, like, you know, if you lose a person, and you replace them. You all know how to do that. But we're what almost all of you we're dealing with in some form is okay. What's as I build to this next level of success? What's the staffing and compensation and Hr model? That's gonna support that. And we don't necessarily

414

01:21:13.170 --> 01:21:37.809

Stephanie Bogan: right. If we took Liz's work chart and her expenses, of yours, Leanna or Lyles, and we

said, Hey, we wanna quadruple. We wouldn't wanna quadruple time overhead staff expenses right, we'd want some. Some efficiency gains right? Some optimization along the way. So we build out growth strategies. Obviously, we talk about the marketing machine right? But the the people engine right? Is the other very big piece of it.

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01:21:37.870 --> 01:22:01.110

Stephanie Bogan: So we're gonna really dive into that. You know, what do those staffing models look like as you grow. How do we design compensation plans? What you know? Do you? You know, Liz, if you quadrupled, would you be hiring a manager in there. So would you not? Right? And then what does that mean to those metrics? So we don't. If our revenue per advisor is 500,000 now, and our goal is to get it to 750,000.

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01:22:01.110 --> 01:22:10.850

Stephanie Bogan: We can't just do more of the same right? So how are we aligning people process and platforms. So Leana will. Yeah, we'll definitely be talking about that, because it's really big on most everybody's radar

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01:22:10.920 --> 01:22:24.170

Stephanie Bogan: right as we grow. How do we, staff? How do we rate pay? And then how do we advance and reward those folks all the way up to right for some of you partnership and equity and to our buyout plans for for a couple of you.

418

01:22:24.460 --> 01:22:29.329

Stephanie Bogan: This you've already done that part. The taking over part is awesome.

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01:22:29.400 --> 01:22:34.150

Stephanie Bogan: So yeah, for sure. But again, those would be things we can definitely pay attention to.

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01:22:34.160 --> 01:23:01.320

Stephanie Bogan: And again, as you get more of that data, we'll be in a better position to use that data to say, Hey, at 3 x. This is what the firm could look like right versus just 3 xing overhead and expenses. Let's talk through that organizational strategy and design. Right? What's the staffing model look like? And then once you guys have your growth strategies, right comp plans, it becomes economics and plan design, which I know seems complicated and cool. But there's a lot of ways you can do it, but it's just

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01:23:01.400 --> 01:23:11.230

Stephanie Bogan: aligning math with the results and the outcomes we want to create. So yeah, we'll definitely talk about that awesome Lyle. Good sir, how are you today?

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01:23:13.450 --> 01:23:15.970

Stephanie Bogan: Very well, how are you good

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01:23:16.130 --> 01:23:32.120

Stephanie Bogan: as you sort of listen to this conversation, share with the group a little bit about where you are in business, planning in general, and or for next year. Anything that you've used. It's been beneficial, and any challenges, or anything you want to bring to the group.



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01:23:32.250 --> 01:23:38.230

Lyle Rosman: So we definitely do our annual business planning. We definitely do

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01:23:38.290 --> 01:24:06.679

Lyle Rosman: sort of a quarterly business review Drew and I I would say the one thing that I would wanna do more regularly would be weekly and monthly. That stuff kind of happens ad hoc. We do only keep it to Monday morning, so it it does. It can't just fall anywhere. That's the one piece of structure we have, something we have. We had sprung on us our first since we've been independent lpl, branch audit thing, which when the first time that shows up, by the way, that's new.

426

01:24:06.680 --> 01:24:08.709

not exactly a comfortable

427

01:24:08.880 --> 01:24:18.170

Lyle Rosman: email that you get, and we're gonna come to our audit and it seems scary. And then you talk to the folks in the Home Office. They're like, Yeah, it's not really a big deal. It'll take 10 min, and

428

01:24:18.510 --> 01:24:35.990

Lyle Rosman: but we kind of had to do a couple of things to prepare for that. So Droop said to me, you know, we really need to spend some time with that. So we did that this morning. So you know, just from a working on the business perspective. We've been really disciplined about keeping that to Mondays.

429

01:24:36.070 --> 01:24:54.350

Lyle Rosman: which is great. But it needs refinement. What a. And it's just not something where we've spent a lot of time on this year because we spent so much time. On other things that we felt were, you know, at that point way more critical from a the perspective of just getting the house in order.

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01:24:55.560 --> 01:24:56.430

Stephanie Bogan: Awesome.

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01:24:56.660 --> 01:25:22.860

Lyle Rosman: Where? Where are you set up? Are you gonna start the monthly you'd mentioned, potentially monthly and weekly with those be withdrew on Mondays. Or is that just? Yeah, that? No, they would definitely. Those would be Monday mornings. That's our work on the business day. Obviously, we do a limitless stuff in the afternoons, or mastermind stuff happens on Mondays. So that would be. That would be consistent, as our sort of, you know, admin work on the business day.

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01:25:23.530 --> 01:25:35.729

Lyle Rosman: Calendars are already blocked out, for that. Clients can't make appointments and things like that. So so that works but just from a systems perspective and and from a discipline perspective, I will say,

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01:25:36.070 --> 01:25:41.170

Lyle Rosman: is the last. Probably 2, 3 weeks has been a really good



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01:25:43.290 --> 01:26:13.230

Lyle Rosman: I guess a really good example of of of this stuff. And why, how we know it's not particularly on point yet. We had our our bleakly annual retreat 2 weeks ago. That was amazing. We got a lot of stuff done there that we knew we needed to do around February like how that was gonna work, what it was gonna look like, etc., came out of that super excited. We were gonna hit the ground running last week with that, and we had kind of carved out some time around because we're in the middle of surges right now. So we'd actually carve time around that.

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01:26:13.360 --> 01:26:26.719

Lyle Rosman: And then, in the midst of all that quite literally, had a one very, very nice opportunity referred to us. And then on the back of that

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01:26:26.720 --> 01:26:48.960

Lyle Rosman: literally the largest opportunity that I've ever had in my career referred to us that just took all the attention to a completely different place. And that's great and awful at the same time, cause it made me realize that the systems are probably not where they need to be, because it wouldn't have caused us to sidetrack everything else we were doing, and at the same time

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01:26:49.180 --> 01:26:56.860

Lyle Rosman: really thankful, obviously, for having the opportunity. and I will say a little bit.

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01:26:57.380 --> 01:27:09.099

Lyle Rosman: I owe a little bit to all of everybody here in this room, and then a whole bunch of limitless people who aren't my ability to go into that situation from a place

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01:27:09.780 --> 01:27:32.159

Lyle Rosman: where I didn't feel like I would have felt previously like. I should not have been having that conversation with that person about a pile of money that big, because that's not who I was, and everybody here. You know, throughout limitless. And all the things that we've worked on put in place and created throughout the last, you know, 11 months or or 10 and a half months is

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01:27:32.320 --> 01:27:39.789

Lyle Rosman: really huge. You know, in in the way that I was able to meet that opportunity. So that's

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01:27:40.300 --> 01:28:05.939

Stephanie Bogan: but yeah, we. Still, we, we know we still have some work to do around systems, because we back burner our whole fee, raise thing. And that was like we had absolutely that was teed up for last week. Yeah, I mean, like, if I don't think anyone on this call would be hurt about pushing a project out a week when they got their largest client ever, I mean, let's be honest. But now I love the

442

01:28:05.940 --> 01:28:29.989

Stephanie Bogan: yes, we can build discipline into the process right, because we don't have to drop everything. But let's be honest. Your largest client ever for everyone on this call is a pretty large client, and that means complicated, and you don't have that super tight, like high end client system built like. So you've just great. You got to get involved. Roll up your sleeves and make sure things get done. And



that happens. And that's totally okay. What I love

443

01:28:30.150 --> 01:28:54.020

Stephanie Bogan: what I always wanted to do. We do it, too. It's intention. There's a complete difference between. I meant to do this. And now I'm gonna go get distracted by this big client is very different than Hey, we were going to do the fee raised this week with the circumstances being what they are in order to meet this client opportunity and maintain our sanity. We're gonna push that out 2 weeks. Does that feel good? Yes.

444

01:28:54.050 --> 01:29:06.370

Stephanie Bogan: that's intentionally redeciding straight to re prioritize. That's being a business owner, right? That happens 17 times a day, 17 times a week, 700 times a year for all of us.

445

01:29:06.670 --> 01:29:30.219

Stephanie Bogan: Lyle. I don't think you would put it off for 19. So that's where the Pro. The system will save you right. Putting it off for a week or 2 is one thing, but when you're doing your week, your monthly check in. It's oh, crap! We thought we were. Gonna put it off for a week, and it's a month that we still haven't started it. Are we still dealing with this thing? And we wanna keep it on hold, or do we wanna make it an active priority again? Right? It's just the consciously reflecting on where it is

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01:29:30.440 --> 01:29:45.839

Stephanie Bogan: active or not active. And you clearly deciding, hey, I'm gonna put this on hold is great. Your quarterly process, if you put it. That's the beauty of a process. If you put it on hold too long, if nothing else. When you do your next Quarterly Review, it's like, Oh.

447

01:29:46.150 --> 01:29:51.920

Stephanie Bogan: we like to call that learning. Here's what I did right, and then quarter over quarter. You get better and better at it.

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01:29:53.080 --> 01:29:59.120

Stephanie Bogan: But congratulations on the progress. and certainly on the client opportunity. That's amazing.

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01:29:59.180 --> 01:30:19.800

Lyle Rosman: Yeah. Well, I listen. I'm not. I don't spike the ball until we get in the end zone. So categorize projects or priorities is a really good point that Stephanie's making. When we do this.

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01:30:19.800 --> 01:30:44.379

Natalie Bergsma: right? If you're going through those meetings you're looking at, right? Is this project on track. What are the issues around it? There is that conversation around. Other things come up and prioritizing and being intentional. And so deciding like is it on hold? And we still need to do it this quarter, or like? Is it no longer a priority, this quarter? And it's moving into next quarter, and then when you get to quarterly planning, you need to say, Hey, something had to move

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01:30:44.390 --> 01:30:58.379

Natalie Bergsma: right. Do we still have the capacity in resources? Right. So you become very focused

on that interruptions not being disruptive, but actually just being a part of what is an iterative

452

01:30:58.430 --> 01:31:15.109

Natalie Bergsma: process, right? Because those things are gonna change along the way. And so I think if you look at your monthly and your weekly meetings right checking in on the status of all the things that you've committed to is a really great way to look at it like, where are we? Red, green, yellow, you know, on track off track.

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01:31:15.350 --> 01:31:33.629

Natalie Bergsma: And then, like, okay, what are the issues around? So that conversation becomes, hey? The issue is, we have another big priority. We're gonna move this out. So we're gonna outsource it. Right? You're resourcing becomes the conversation. How are we resourcing the firm? Not what are we not getting done? Right? Very different framework?

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01:31:34.080 --> 01:31:48.930

Stephanie Bogan: Yeah. One feels like you're making conscious decisions. The other just feels like you're getting caught on the on the wheel again. When I was united we had 8 or 9 people on the executive team to start, and they had no process for tracking priorities or progress. It was really fun.

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01:31:48.940 --> 01:32:07.329

Stephanie Bogan: So you know me, I built a spreadsheet, and I color coded it right where we had each white leader and their priorities, which is a very easy thing to do in Asana or with your team. And then it was right. What's the priority? What's the status? Green, yellow, or red owner? Due date of project and next action? And then the best part.

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01:32:07.410 --> 01:32:11.230

Stephanie Bogan: which is the conscious part is reason for status.

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01:32:11.520 --> 01:32:20.059

Stephanie Bogan: Right? It's yellow. Because, we, you know, decided to take on a big client opportunity, and that push the timeline out 2 weeks. Okay.

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01:32:20.340 --> 01:32:44.749

Stephanie Bogan: now we're aware of that as a team. We get it all right. Fine. Right? You come back the next week and the next week, and the next week, and it's still yellow. Then it goes red like you can't ignore it right. It's like putting that speed machine that you see on the side of the road in your office once a week, once a month and going, you know, speed check. How are you doing? Do you need to speed up? Do you need to slow down so that that autonomous external feedback loop

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01:32:44.850 --> 01:32:58.299

Stephanie Bogan: is far more powerful than what we do in our heads. It's why the speedometer on the dashboard doesn't slow us down, but the speed box, when we drive by it grabs our attention, and we moderate. We regulate our behavior.

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01:32:58.490 --> 01:33:23.539

Stephanie Bogan: And that's the important point. All the change and the energy and the time and the

momentum. We've talked about what we're talking about is the system to regulate the application of time, energy, and capital. So you're doing it in a conscious and committed way. And when you take actions, or don't, Lyle, you're doing it confidently, understanding the circumstances, the conditions

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01:33:23.670 --> 01:33:34.979

Stephanie Bogan: right? And you know you've gone through, even if it's 30 SA quick process of like, hey, am I willing to put this out next week so that we can tell this client that this prospect they don't have to wait 2 weeks for their first meeting.

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01:33:35.130 --> 01:33:42.790

Stephanie Bogan: Now, next time you might decide differently might be like, Hey, I'm gonna make this guy wait a week, but you might not. It's that sitting in the moment

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01:33:43.060 --> 01:33:50.490

Stephanie Bogan: and getting awareness, and then making the decision, that is the most, the most powerful part of the exercise. Right being the regulator.

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01:33:50.580 --> 01:33:57.100

Lyle Rosman: it'll give me the opportunity to recognize whether whatever I'm

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01:33:57.130 --> 01:34:06.379

Lyle Rosman: quote unquote reprioritizing is really something I'm reprioritizing, for if it's or or if I'm hiding from doing something I thought was uncomfortable.

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01:34:06.500 --> 01:34:27.060

Lyle Rosman: Which is, you know, again. By the way, to that point, I have a very quick, funny story about the whole fear is concept. This is a very scary thing for anybody who's who has thought about doing it, but it's never done it. Liz knows she's done it. It's piece of cake. No problem. When you're on the back end of it. It's easy for everybody. So I tell Jamie

467

01:34:27.190 --> 01:34:37.510

Lyle Rosman: or Ca that this is what we're gonna do and cause. Obviously, she's gonna need to prepare the docuign. She's freaking out about it. So at our bleakly retreat.

468

01:34:37.540 --> 01:35:02.800

Lyle Rosman: Harold and and Tracy are there who got went through limitless are going through limitless. And did the fee raise earlier this year? So I asked them how it went. And they're like, Oh, is great. We sent out 37 emails. We got 2 phone calls and everybody signed a hundred percent. It was not even a question. So we send out 37 emails only. Yeah, I said, Okay, Camille, I need you to tell Jamie that story where they were.

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01:35:02.800 --> 01:35:07.749

Lyle Rosman: And I'm like Jamie, you gotta hear this story, Tracy, tell her about the fears.

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01:35:07.910 --> 01:35:08.920

Lyle Rosman: Lord.

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01:35:09.290 --> 01:35:15.499

Stephanie Bogan: well, it's great sometimes, Liz. I think you went through this a bit tiff, and Jared have gone through it like sometimes your staff.

472

01:35:15.500 --> 01:35:40.290

Stephanie Bogan: I say this would love care too much. They're like that. Servants. Heart is like you can't raise the fee or transition, the client that makes this evil money grubbers. And we we've never been that. And who are you? You know? What's this limitless program? What are they doing to you. And it's like, No, this is a business we're allowed to make more like we're allowed to, you know. Bring our fees up to market levels and make sure we have profits to sustain the like.

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01:35:40.330 --> 01:35:57.399

Stephanie Bogan: but they really can get like they take ownership of that piece you're like, well, I wish you would take that good ownership of all the other stuff, right? They really can get locked into that. Oh, this is not a good thing, and it's funny cause they're getting paid, no matter what. That's the hilarious part.

474

01:35:57.450 --> 01:36:24.980

Lyle Rosman: But it shows how condition you know. If if we do it and all our clients leave. Then there will be revenue to pay me anymore. So you know, there's there's, I think there's a little bit of fear, too. I'm scared for you. I'm like, we're gonna be okay. Well, that was, it's nice that there's concern there. And again, right? Your job is to provide the information so that you can make good choices, and they'll they'll figure it out. Liz went through the same thing

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01:36:24.990 --> 01:36:49.090

Stephanie Bogan: and no one died, and they made, you know, 6 figures more in income, and you know everyone was the benefactor of that. And on the other side, everyone thinks it's the best thing ever. We call them white knuckle moments, and Adam will tell you Tiff and Jared, Harold and Tracy on the other side, 99% of the time. And I just say that cause I like to, you know, not make guarantees.

476

01:36:49.470 --> 01:37:01.299

Stephanie Bogan: but it hasn't happened yet. 99.9 9% of the time. It's I wish I would have done that sooner. It was a non event. It was like, maybe one or 2 people asked, or I got a little. But in the grand scheme of things.

477

01:37:01.410 --> 01:37:02.529

Stephanie Bogan: I just

478

01:37:02.560 --> 01:37:12.469

Stephanie Bogan: improve my ability to run a good business like, Wow! Imagine that! And clients did not run screaming from the building. So kudos to you cause. That's a big leap, and

479

01:37:12.970 --> 01:37:33.619

Stephanie Bogan: it's good for her to hear it from other people that you're probably not gonna get

eaten by, but literally, to people. This kind of changes the equivalent of not just getting eaten by a tiger. It's like walking over to the tiger's cage, opening its mouth and sticking your head in on purpose, and the team sometimes looks to you and go. Why would you do that? You're putting your head in the tiger's mouth?

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01:37:33.630 --> 01:37:42.120

Stephanie Bogan: And it's cause we know that for the most part the tigers not gonna eat us. And right, we're gonna have a better surface when it's all done so good. I love love that progress.

481

01:37:42.670 --> 01:37:59.220

Natalie Bergsma: Yeah, it can also be helpful to share with the team right? The reasoning behind it. And what's going on? We did that with the team. Once we said, Hey, we ran the numbers the opportunity cost. Here is \$70,000 a year. That's another client service person to support you so that you can grow into your goal being the operations manager. And she went.

482

01:37:59.600 --> 01:38:15.150

Stephanie Bogan: oh, okay, right. We're aligning incentives because you can't motivate people with compensation. Not for any per per period of time.

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01:38:15.260 --> 01:38:39.649

Stephanie Bogan: You can demotivate people right? And compensation isn't just cash. It's involvement. And we'll talk a ton about that next year. But, Lyle, I'm really glad to see that you guys have a process in place. I like to see that it's working and definitely would look at those weeklies and monthly. Is just it right? Speed, speed, check in right like they have one in my neighborhood. Every time I drive to the grocery store. It's right there. It's awesome.

484

01:38:39.650 --> 01:38:50.109

Stephanie Bogan: Cause I'm always like, Oh, look 27 and a 25. Okay, gotta slow that baby down a little bit. Right? It's that external feedback loop that's really, really helpful. So hopefully, that helps you guys

485

01:38:50.220 --> 01:39:01.419

Stephanie Bogan: just think about business planning as we right as we kind of roll into the back end of the year. This is obviously, if you want to take time and right, enjoy yourself and the holidays. That's great. And and and

486

01:39:01.500 --> 01:39:18.119

Stephanie Bogan: this is also a clarity time where we use the last 60 days of the year to really reflect on the progress that we've made the wins, the things we still need to account for and really ask ourselves, what's what's our system for ensuring that we can execute

487

01:39:18.300 --> 01:39:25.289

Stephanie Bogan: on creating those new levels of success. Because we know if we have a system, as Natalie's been hearing me say for 30 years now.

488

01:39:25.310 --> 01:39:37.620

Stephanie Bogan: the system will save you. The system will always save you. Right? The more we rely on



the system the more it becomes normal operating behavior. And I think you guys could already see things that you would have never thought about doing

489

01:39:37.740 --> 01:39:48.659

Stephanie Bogan: before are now things that seem like old hat, and you would never go back right lie on the other side of the fee increase. You're gonna feel the same way as everybody be like. Wow! Why didn't I do that before?

490

01:39:48.900 --> 01:40:00.669

Stephanie Bogan: so let us know how we can help, whether it's implementing your business plans or on the priorities. I think Sandy sent out the link. I think everyone on this call has scheduled Lana and Travis. Maybe you have not scheduled

491

01:40:00.750 --> 01:40:11.050

Stephanie Bogan: a November call yet, if you want one, you should have that information in your inbox. If there's anything else we can do to support you in November. Please don't hesitate to reach out our next call on the twentieth.

492

01:40:11.070 --> 01:40:36.270

Stephanie Bogan: as I shared. We're gonna be revisiting a very cool lesson on drawing out your future to double or triple your growth, and then how we can use that to keep ourselves and our teams inspired, as we right put plans and priorities to those visions and kick off next year. So, looking forward to that conversation with you, and if you guys need anything as always, please don't hesitate to reach out. I, in the coaching team are here to make help. You make the most of your year.

493

01:40:36.620 --> 01:40:38.280

Liana Poodiack: Everyone have a great day.

494

01:40:38.390 --> 01:40:52.739

Liana Poodiack: Yeah, you, too, Steph. I believe Travis and I are on your schedule, and I think it's for this week 2 appointments. Yeah, I know, Sandy said a couple of people had, and I wasn't sure if you were on the list. Are you guys ever getting back in your office

495

01:40:53.390 --> 01:41:13.429

Liana Poodiack: we still don't know yet. We're crossing our fingers, but we have met our 7 year anniversary for steward partners, so we are fully rested at this point going forward. So congratulations! That's great for you.

496

01:41:13.670 --> 01:41:16.449

Stephanie Bogan: You got some big, big momentum going, Lyle.

497

01:41:16.650 --> 01:41:32.489

Stephanie Bogan: Yeah, I and I'm I'm I just wanted to mention. I'm I'm in with you on Thursday afternoon, so oh, perfect! Alright! Then I will talk to you in a couple of days.

