

LIMITLESS Coaching Call Transcript

November 6
Lifestyle Coaching Call
Business Planning

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Stephanie Bogan: All right. Is everyone ready? We are narrowing down the year hard to believe time flies so much when you're having fun as we wrap up the year and really reflect on progress

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Stephanie Bogan: that you've made. It's also time to start planning if you have not already for next year. So we wanted to go back through a review around the business planning process. Note that, like all things that limitless, you can go skinnier on this process right lighter. You can go deeper on this process if you have a team attend, and you're doing off site retreats

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Stephanie Bogan: and there are resources for you under strategic planning, business, planning and action and accountability in the library, irrespective of what level you're applying these at. And Natalie and I will give you some examples as we go. We joke. You know Adam's business plan is, his one page plan is still on a yellow notepad. He doesn't even use the worksheet. It doesn't matter. I don't care.

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Stephanie Bogan: because what he has is a system. That system can be a post it which is what it was for Adam in year one. It can be a one page business plan, which is what it's been since. But what matters is that he has a clear system for defining his vision and goals, and to hold himself accountable right to benchmark against

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Stephanie Bogan: as he makes decisions. Does this align with the plan that I have for my practice? Is it going to create the outcome and the results that I want. So that's really the focus of today's call. I've got Natalie. He coached Natalie here with me.

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Stephanie Bogan: Here's what we're gonna cover today, right? Approve and process for managing performance. We talk about this when we kick off the year, and I just wanted to do a quick review. All change processes, whether you're on your own or you're in a team of a hundred or a team of a thousand.

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Stephanie Bogan: All change processes that work have 3 factors clarity. What are we doing, and why are we doing it? Why does it matter? How does it align



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Stephanie Bogan: if we don't have that? It's just a bunch of stuff. I wanna grow 20% a year. Cause that's what everyone does. I wanna do. X, because it's on my list.

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Stephanie Bogan: So that's where mission vision values that 3 year vision really comes in transparency. This is the piece very few people get right, which is where most plans break down is, we just decide something, and we have no process to execute to monitor and manage how we're progressing. And that's where transparency comes in. This is with your quarterly business reviews

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Stephanie Bogan: with your monthly or your weekly team meetings, or your marketing meetings, which we'll talk a little bit about, and which are really covered in depth in the review workbook.

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Stephanie Bogan: If we don't have a line of sight between what we said we wanted and what we're actually doing in relationship to that, and how it's going. Then it's just a wish, which means that the odds are overwhelming. At the end of the year you'll wish you'd gotten around to it, but you'll be a little bit frustrated that you hadn't.

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Stephanie Bogan: So when you put a disciplined planning process in place and you follow it, your execution tends to go up to about an average of 70%, not a hundred percent, by the way, because nobody rocks everything, every quarter, not even us.

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Stephanie Bogan: But we ultimately want to get to that 70 or better point, and in many cases we don't even know what the priorities are, much less how we're executing on them. So again, even if it's you or you and a part time assistant, it's really about how you're holding yourself to that plan that becomes your calendar. It becomes your your time, but it also becomes right. What are the activities, and how are you tracking them?

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Stephanie Bogan: And then we hit account ability. Which is, what are you doing on a consistent basis to make sure that the decisions and behaviors that you're engaging

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Stephanie Bogan: actually align with the goals and the outcome that you want, because, remember, we all know, we spend a lot of time and energy getting busy and doing that factory focus faki work, but it may or may not be fiercely aligned with the vision and goals that we want to achieve. And there's usually something standing between us and that. So your discipline process

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Stephanie Bogan: is really about. You can't manage what you can't measure. So again, it could be a post. It could be a one page plan. It could be the deeper resources. But have you laid out a plan? That's proactive, is it? Process driven, Kevin? It can't just be like, oh, I wonder if I'm on track middle of July.



Right? What's that system? As Tiffany likes to say? The system must be greater than the resistance it will experience, and when it comes to business planning. Let's be honest. The resistance is the day to day, and the fact that we have to really step out of it

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Stephanie Bogan: and get in a completely different head space to have these conversations with ourselves. So we have to make sure that there's a time and a space for accountability in our business planning processes. So as you look at your calendars for next year, remember Mondays on the business days. That's where you put on your CEO hat and run the shop. Run the business working on it, not in it. That's when you should be having team meetings, planning sessions, right reviewing your

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marketing results, reviewing your business plan reviewing your mastermind group up like whatever it is.

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Stephanie Bogan: Mondays are your days to work on it and hold yourself accountable to it right? And the rest of the week. You can schedule things that you need to do to support it.

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Stephanie Bogan: So you can go back and watch the vision lesson. You can watch the action and accountability lesson. If you wanna go deeper with teams, you can watch the strategic planning lessons. There's a lot of deep stuff there and Tiff and Jared graciously shared a lot of the process that they've applied based on their work at limitless, really get their teams both involved because ultimately people who are involved tend to be much more invested.

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Stephanie Bogan: So this isn't just a process for you. If you have even a part time, person, or any kind of a team. It's about creating alignment and interest

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Stephanie Bogan: and investment in the goals that we set out. Which means that we need to show purpose, because people remember need 2 things, purpose. What are we doing, and why? And progress?

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Stephanie Bogan: Our is our time, energy and effort actually making a difference. Both you want that and your teams want that. So we're gonna go through the Quarterly Review workbook the business review workbook which walks you through doing a quarterly business review to make sure you're aligned with your annual planning process again.

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Stephanie Bogan: You do not have to fill out every page of the workbook every time, but I want you to get in the habit of thinking about and reflecting on these kinds of thoughts and ideas as you set up your plans and priorities for the next quarter

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Stephanie Bogan: this is our mapping, your business model worksheets. Natalie and I were actually talking about this going into the call. Right? This is where you're gonna translate the ideas about what you wanna do over the next 3 years, which you should do every year. By the way, because you're future casting

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Stephanie Bogan: whatever happened this year, right? Your next 3 years is right, plus 4 from where you started this year, right? And plus 4 for so you're constantly reiterating. But it's good to sit down, remind yourself of the mission vision and values. Describe what it will look like. This is the hard part for most people that we skip.

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Stephanie Bogan: Vincent, I literally want you to say I come in every day. I do work with people. I wrote 56 people that I really love. It energizes me. I'm focusing on energy creating activities. I feel productive when I leave. I'm creating the income in the lifestyle that I want. Our clients feel like they get deep value. And we have, you know, incredible, you know, client service like whatever like. If you, Kevin or Edwin or Aaron, we're gonna paint us the picture of what that awesome practice look like.

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Stephanie Bogan: What would it look like from a descriptive standpoint? And then and then only, we get into the tactical pieces

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Stephanie Bogan: right? Natalie loves to go through these and business plans like, Where are we? Where are we gonna go?

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Natalie Bergsma: I think what's really important here is there's some neuroscience behind it as well. I actually really love printing out

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Natalie Bergsma: this worksheet and writing with your your hands, because there's science that says that, hey? We just learned how to type with our fingers and our thumbs. And so actually using pen to paper ingrains those things into our neuroscience. And so when we sit down and we say, What's our mission? What's our vision? What's our values? What's it look like? And then we get into the real like goal setting piece of it. How big do we wanna be? What's our average revenue per client?

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Natalie Bergsma: How many days off do I want to do? I cannot tell you the number of people I say, like, Hey, I wanna take 60 days off here, but then they don't track it. They don't measure it. They're like, I don't know how many days I took off this year, and we don't know. It's almost always less than what we set the goals for, so I think this is a really critical piece of the process. It's just getting 100 clear

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Natalie Bergsma: on what you want it to be like and what you want it to look like. And that's where I also love the other box. I have clients who work



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Natalie Bergsma: in kind of a progressive space, and we've set a goal for impact.

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Natalie Bergsma: How are you going to impact and give back

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Natalie Bergsma: in the world? Right? That's really important to them. And so when you take a look at those 3 year goals like, Hey, where do I want to be in 3 years? Where do I want to be in one year? And where am I today? That last column really becomes a little bit more clear, because now you can see the gap in where you are and where you want to be. But one of the things that I recommend is, start on the right and work your way. Left. Always start with the vision of where you want to be

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Natalie Bergsma: and then work to. Okay. Now, here's where I am, because that does another thing for your brain which it says, Hey, I actually get to think from that future state and my future self. What would I be doing? What are the things that I've done to get here as opposed to looking at it as like this large bridge that you have to cross that has these huge gaps in it. So like as you're filling out this worksheet. I think those are some tips and tricks to help you get into like a really positive state of mind.

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Stephanie Bogan: as you're thinking about where we're going and what we're doing. Well, think about it iteratively right? So if you're at Revenue X, and you want to be at revenue plus 50 x and 3 years. One year is gonna look different than 2 years is gonna look different than 3 years right? But everyone might sit down and say, right that 3 Year Gap, which you don't need to be afraid of, because the gap is just

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Stephanie Bogan: information. It's your roadmap for change. Edwin can look at his current math and go, hey? That's 27 people, or Hey, you know what in my new model that's gonna be 15 people at a higher revenue or a higher price point or a higher minimum. And then our brain, to Natalie's point, starts to actually triangulate. What will it take to make that happen? Where am I gonna find 27 people. So we get all freaked out like, Oh, my God, I'm gonna grow. It's gonna be so much work. And it is work.

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Stephanie Bogan: But if you realize it's 27 people over 3 years to use that example that might mean it's 5 people in year one and 10 people in year 2, and you know 15 people in year 3 right? Like when you could break it down for your brain, it becomes a lot less intimidating to Natalie's point. We don't tend to break it down. We tend to go. Big goal, very fuzzy and ambiguous. Not gonna put any great pencil to it. Just gonna be squishy around the edges, you know Charlie Brown's mom. Wa.

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Stephanie Bogan: And then at the end of the year, gonna be like. But I work so hard. I don't know why I didn't hit all those goals. This is where clarity really counts. When you tell your brain I'm gonna need to find 27 clients at this amount of revenue. It starts to go. Oh, well, I'm a curiosity problem solving machine. I guess I should get on board with that. That's why, reviewing your goals on a weekly, monthly, consistent basis are super helpful.



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Stephanie Bogan: And aside when you set those goals it's in the library. We didn't pull it into this session. But if anyone remembers Jed's limitless lifebook.

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Stephanie Bogan: it sets out his goals. And then the principles and the strategies. Here's my time model for the year. Here's my client model. Here's my fee model, and he reviews that. I think it's every week or every month, every week, and he's like man. I review that every week, and reminds me what I'm doing and why, what I'm doing and why what I need to do, and why I need to do it to fill that gap. There's a level of consciousness when we review

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Stephanie Bogan: that roadmap for change, and what our goals are from right to knowledge, point of place of positive belief and intent. Our brains are much more likely to get on board. But if we go like, Hey, I need to market more. Our brain goes. I don't know what that means, Kevin. Good luck with that. If it's hey? I need 27 people, which means I'm gonna need to have 3 coi meetings devote, you know, 4 HA week to digital marketing. Then your brains, like, okay.

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Stephanie Bogan: I can triangulate. And I can make that happen right. I've got enough coordinate information to to really kind of create some directions for you.

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Stephanie Bogan: So the more you review and reflect on it, the more it bakes into your brain as the target that you want your brain to work towards. So Natalie's point, you wanna go through each of these areas and get really clear about what that roadmap for changes, and what it will take, not from a place of fear and scarcity, but from a place of possibility and abundance. What will it take? Is a wildly different question. Then how am I gonna do that?

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Stephanie Bogan: Where those clients gonna come from? Notice the difference in the conversation and the tone. But if I sit down and I say, Hey, you know I'm getting 4 clients a year, and I wanna get 12 clients a year. What's it going to take?

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Stephanie Bogan: You genuinely? Have good information and intellect to be able to start to figure that out, hey? If I'm doing this to get 4, and it's all referrals. Then could I double that? What would it look like if I doubled that? What are the things I would have to do? Should I do an advisory board? Should I put a referral program in place?

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Stephanie Bogan: Should I be doing referral workshops? Now you can. Now you can start to narrow how I'm gonna do it. And I hope you guys figured out by now there's no shortage of how running around limitless. There's no lack of how right. It's just harnessing what you wanna do. So this is our one page business plan. You've seen this many, many times as an example. The goal is not to fill this out for the whole year, because Laura, whatever you put on in is probably not gonna happen in



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Stephanie Bogan: right but understanding. Going back to that workbook. What are our priorities for the year? And then each quarter going back to that launch process which is very similar to us, or traction. If you use that, no worries go for it.

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Stephanie Bogan: It's about really looking at the broader plan and then saying, What am I going to invest my time and energy on the business in each quarter to make sure that I'm doing things that really move the needle. Not 50 little things. Not that there's not a lot of those. But Erin and Roseanne and Danny like, what am I going to do in Q one that's gonna really move the business forward?

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Stephanie Bogan: Is it a fee issue, a systems issue, a staffing, a marketing. So you guys can have all gone through this a bit. But I and we're gonna do some breakout, so you have more time to talk about it. But really Adam has this on a yellow pad

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Stephanie Bogan: he literally goes through every year, and I don't care that it's on a yellow pad. What I care about is he has a system. He has a place where he captures his priorities, and he reviews and reflects on them regularly.

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Stephanie Bogan: When you do that, your odds of achieving them go up to well, over 70%, especially if you share it with someone. It goes up to over 85%. If you don't.

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Stephanie Bogan: the odds drop precipitously. So this is really the time. If you haven't yet to sit down and go through the vision workbook and ask yourself, what's my plan for next year? Remember, the workbook has the 5 big moves. If you did nothing else that could be your plan for next year.

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Stephanie Bogan: The business plan just gives you right a one page format to kind of focus. How am I getting from the big goals to the objectives, to the priorities that I need to attack. And again, if you guys do these drafts and need feedback, that's what we're here for.

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Stephanie Bogan: Here's what the Quarterly Review Workbook covers. Natalie and I are going to take you through this pretty quickly, and then we're going to do some breakouts to help you really start to think about priorities and plans for next year. One financial performance. Are we on track?

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Stephanie Bogan: Why or why not? What needs attention. What am I going to have to do? What action will it take? Do I need to generate more leads? Do I need to improve conversion? Do I need to improve messaging? So I'm not losing, as many people do. I need to strengthen my call to action because they're getting to the contact us, page, but half of them are dropping out right. If we start to really get clear



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Stephanie Bogan: on the Co. What's not working, we can ask ourselves good questions around finances, practice marketing and your personal performance. Are you focusing your time, Vincent? Are you doing the things that you said you wanted to do this year. If you're not cause you're human, and people get in the way. What are the things that are sitting in between you and that progress? And how can you account for them? So this really asked you to look at the financial performance of your practice?

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Stephanie Bogan: The practice itself. Is it operating and running in the way that you want is your marketing, driving the growth, profitability, and the results that you want. And then how are you doing? Is your momentum right? Are you empowered? Are you operating from that positive state? And if we look at these 4 areas, then we're gonna be in a much better position to really build that plan of attack?

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Natalie Bergsma: Yeah.

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Natalie Bergsma: well, and I think the the critical piece of adding all these components together is it gives you a roadmap to measure your progress. It gives you a structure to create

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Natalie Bergsma: progress right? Because when left to our own devices, I'd probably rather sit around and watch Netflix, then then move forward. So right having that structure is gonna enable you to create that consistent progress like, we all talk about creating big goals, how do we get to them. And we hear all these success stories and all these wonderful things. But what Adam can tell you what all of the people that who've been through limitless. When you say, Hey, when do I get

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Natalie Bergsma: to be that person? Right? It wasn't necessarily leaps and bounds. It was something that they did consistently, regularly over and over and over again.

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Natalie Bergsma: right? And that's where the business planning piece really comes into play, because it allows you to set your objectives, your priorities and then set small incremental steps to move forward in each of those areas it focuses you on what's most important in what you want in your business and your life.

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Natalie Bergsma: and it gives you a structure to get there. That doesn't mean that it's going to be easy. It doesn't mean that every day is going to be fun. But it does create that model. When you say, Hey.

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Natalie Bergsma: it's hard today.

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Natalie Bergsma: Alright, what's the model that I put in place? What's the goals? Okay? I committed to working on my business on Mondays from one to 3. All right.

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Natalie Bergsma: I know that's tough. My brain doesn't wanna do it. But I can go back and look at my why and the purpose. And what do I get from doing it and sit down and spend that time. So I think that's a really important piece of this is having a consistent structure that's reviewed annually, quarterly, monthly, and even on a weekly basis, keeps you moving forward towards your goals when your motivation isn't always there, because I think when we set goals

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Natalie Bergsma: there's a lot of motivation and energy and enthusiasm, and what I can promise you is 6 weeks later, you're not gonna feel the same energy and motivation motivation actually works in a curve. So that's I think a big piece of this is creating that structure to keep you moving forward.

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Stephanie Bogan: Well, and the thing I want you to think about is if you're sitting down on a Monday or any day but Monday time should be blocked at this point, certainly going forward, and you don't know what to do.

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Stephanie Bogan: You have not defined that in advance the odds are overwhelming, that you will not do it, or you will waste that time. So this is where, having a clear set of priorities. What even if it's what is the one thing and limitless? I'm working on right now, and that time is devoted to that consistently. However, you've time blocked weekly, etc.,

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Stephanie Bogan: if you sit down and go. Oh, I've got 2 h. What do I need to do? You'll waste an hour of the 2 h figuring out what to do, which is why, again, we wanna lay out that clear, clear roadmap for change.

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Stephanie Bogan: and then really talk through each quarter. Hey, Dana, what are the things we're gonna walk, focus on? What is the team communicating around? How are we reporting our progress and making sure that we're doing it. So again, it's making sure that you have habit patterns for clarifying, creating transparency and creating accountability. If we don't have some structure with ourselves and or our teams. We simply can not create that flywheel. Right? The momentum that brings change.

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Stephanie Bogan: Here's a quick overview of what's in the Quarterly Business review. And again, we're gonna we're gonna speed through it and then do some breakouts. One right? What's the 3 year Vision, your one page plan and your landscape. What's going on in the markets? What's going on in your practice? Where do you? What does that fit in? Does anything need to change in our business or a client model.

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Stephanie Bogan: This is the time to decide it, hey? I need to increase my minimum or raise my fees or

clarify my services, so I can make it more tangible and feel confident in the value. Or I need to hire people right? This is the what resources do we have? Then you're gonna set your 90 day plans right? That's each quarter. Dana, what are the things we're gonna thing with things? We're gonna focus on this quarter.

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Stephanie Bogan: There's an action plan, form it. It's really it might take you an hour to get through the workbook. But you're gonna find that that hour is gonna be so wildly invested in creating clarity. That's gonna help you move forward when Dana sits down and says, Well, I need to do this. But the roadblocks already don't know this, and I don't know about that. And I gotta figure this out. Now again, we have a roadmap for change. If we know what we don't know. What can we do, Dana?

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Stephanie Bogan: We could go figure it out right. We can call someone or ask someone. So it's getting really clear. But a lot of times we get overwhelmed, and we don't take time to create that clarity. And as a result, we get around 2 things when we have time, which isn't very often.

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Stephanie Bogan: So that 90 Day plan is a staple in your success diet. If you sit down and you put one project on a post at Laura, and you stick it on your computer. And you're like this is all I do until it's done. That would be a huge win.

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Stephanie Bogan: right? We don't bring that level of discipline which is why we have deeper processes. But it's really about. Can you force yourself? Can you create a forcing mechanism to work on the business.

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Stephanie Bogan: And then can you monitor and manage? This is your accountability financial performance. If you're looking at those numbers every week, every month, every quarter. You're gonna be really tuned in, hey? Where my SEO numbers my conversion rate isn't where I want. I'm not getting the number of prospect calls, hey? Markets were down. I gotta focus on share a wallet. What were referrals? So that's where those reviews help us evaluate. What is? Where do we need to tweak things financially.

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Stephanie Bogan: Where does the practice need to change? This is where we look at our benchmarks, our metrics, right? Anything we're trying to pay attention to to really elevate the game

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Stephanie Bogan: marketing performance again, there's deeper details. But you wanna be looking at all of your growth channels and how they're performing on a consistent basis because you are a marketing data scientist. If you're doing marketing right doesn't mean you have to love it or be perfect at it. But it means. You need to look at it, to be really aware of what's working and what's not, and how you can start to find tune, remember, refine, and repeat, refine, and repeat that growth engine, that marketing machine we talked so much about.

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Stephanie Bogan: And then, last, but not least, your personal and professional goals. To now these point you can say I want more time off. But are you tracking? Your hours worked per week? Are you tracking the days off that you take? Are you holding yourself accountable to those things?

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Stephanie Bogan: Are you working on energy creating activities? If you're not, what's holding you back right? What's keeping your momentum from being in that positive, empowered success state that's really driving things forward, which is probably the most important thing that you can do, because when you get in that lane, even if you don't do any of the other stuff stuff tends to get done right when we show up clear, conscious, and committed, it doesn't matter if it's on a piece of paper or post it.

162

00:37:08.890 --> 00:37:15.529

Stephanie Bogan: or a 50 page plan we show up and we apply ourselves and we get things done. So that's the overview.

163

00:37:15.600 --> 00:37:33.029

Stephanie Bogan: And again, Natalie and I are gonna go through this really quickly, cause you can dive into it. But it's gonna take you through those those review areas that we talked about. How did you do this quarter? How is performance? Are you clear on your goals and priorities? So that as you're going through. You're now in a position to skip one.

164

00:37:33.430 --> 00:37:34.860

Stephanie Bogan: I go back. Sorry

165

00:37:35.550 --> 00:37:38.650

Stephanie Bogan: you're in a position to get the information that you need

166

00:37:41.420 --> 00:38:05.119

Natalie Bergsma: alright. So as you look at the the business review and preparing, there's some things that you might want to pull together right? What's your Pnl budget versus actual financial performance is a really critical thing. We wanna continue to plan for and measure on an ongoing basis your aorum reports. How many new clients have they contributed. What's going on in the market? How do we plan for that? We all know the markets fluctuate? So we have to think about.

167

00:38:05.120 --> 00:38:20.700

Natalie Bergsma: how does that impact or change my goals for new clients, or where I need to focus in the business. Taking a look at your business pipeline, right? Where are clients coming from? I cannot tell you the number of cli times I go into a firm, and I say, Hey, where do your clients come from? They're like. Oh.

168

00:38:20.830 --> 00:38:37.640

Natalie Bergsma: we don't know. We don't know. We don't track it. We have 0 idea right? And then I take them to the fun exercise. Well, let's go look at your last 30 clients and see where they came from. Right? So, having a system to do that consistently not only

169



00:38:37.780 --> 00:39:02.039

Natalie Bergsma: makes your life easier, IE. You don't have someone having to go back and do it. When you start something new. It gives you a model to measure that performance. Your practice benchmark, which is another way to kind of track your financials, and how we break them down. And critical kpis, right? We go in and we look at this and say, Hey! Our goal was to increase our average revenue per client from, let's say, 5,000 to 8,000,

170

00:39:02.170 --> 00:39:31.859

Natalie Bergsma: or from 8,000 to 10,000 right? If I don't track that progress. I'm not seeing the decisions that I make. You know, when we used to do this step quantum, we had a client. We sat down with them, and they were like, Oh, yeah, no, we're doing great. And then we ran the numbers. We said, well, you took in 3 clients under your minimum this quarter. So your average revenue per client has literally gone down, not gone up. So it's another way to hold you accountable. Right? So are you measuring your client profitability.

171

00:39:31.860 --> 00:39:40.710

Natalie Bergsma: so kind of setting out for you which one of these you're gonna move the needle to make sure that you're measuring that performance, and that also can then share

172

00:39:40.740 --> 00:39:58.540

Natalie Bergsma: changes as you get to that quarterly process. Okay, this area is doing really good. I've actually maybe hit the goal sooner. How does that change next quarters? Priorities? Right? Maybe we've mailed marketing, and it goes on autopilot. And now we really need to focus on adding a new team member, because I'm not leveraged enough.

173

00:39:58.670 --> 00:40:17.190

Natalie Bergsma: So that's kind of then going into each quarter, going through that work right. What is that I'm doing? Here are some of the metrics that I'm tracking. What are the goals that I have right practice, professional and personal? I think I always get the question, what's the difference between

174

00:40:17.190 --> 00:40:33.119

Natalie Bergsma: a practice goal and a professional goal? Right? The way that I break it down is practice goals or goals for the business things you want to change in the business goals that you have around financials or new clients, professional goals, or what I consider to be leadership goals.

175

00:40:33.260 --> 00:40:40.559

Natalie Bergsma: How do I want to change who I am and how I'm showing up, or what areas do I want to grow

176

00:40:40.560 --> 00:41:03.879

Natalie Bergsma: as a professional. So maybe you're doing podcasting as a practice goal and a professional goal might be, hey, I need to get better at public speaking. I Wanna, hire a speech coach to help me with that right? And that's gonna be different than your personal goals. But it's really all of these things together, collectively, right. We are not are only our business, or only a leader, or only, you know, a dad or a mom, or

177

00:41:04.080 --> 00:41:29.340



Natalie Bergsma: ourselves in real life. For all of these things at the same time. So right sitting down and doing that the same time makes a whole lot of sense. Well, and I think the thing that's really important is 90% of you won't or haven't done this on a regular basis. So just sitting down and saying, What are my 3 big practice goals for the year, or personal or professional, is a clarifying exercise that forces Edwin or Christine or Rizario to say.

178

00:41:29.500 --> 00:41:54.140

Stephanie Bogan: Oh, what are they relative to where I'm at and what I want to accomplish of the sea, of everything that I am overwhelmed by on a daily basis. It's it's a forcing mechanism for focus. When you go through this workbook exercise, it is a continuous forcing mechanism to create clarity for your brain. What worked, what didn't? What do I need to do? What are the steps I need to take? What does success look like? What challenges might I face if Dana goes?

179

00:41:54.240 --> 00:42:14.820

Stephanie Bogan: Hey? I'm gonna face the challenge of being scared of raising my fees or losing clients in an advisor transition or right updating my website, or I'm not gonna have enough time or money now that we've put it out on the table, we're not governed by the fear now, it's just a fact of data that we can sit there and really right, start to assess and learn how and really focus on how to overcome.

180

00:42:15.020 --> 00:42:30.699

Stephanie Bogan: So each section in the workbook just takes you through a different piece of that forcing exercise. Once we've got our goals for the year. Right? Aaron, I can say, Hey, I've got this big practice goal. I wanna double my client revenue or average client revenue over the next 3 years.

181

00:42:30.700 --> 00:42:46.579

Stephanie Bogan: Jodi, you see how I just went from? I want more to a very specific. I'm gonna double my client revenue over the next 3 years. Okay, this year. What does that mean? I'm gonna grow it by 25 or this year. I'm gonna raise my minimum and not take anybody that doesn't need it.

182

00:42:46.770 --> 00:43:10.459

Stephanie Bogan: Hey? What does that mean? In the next 30 days I'm gonna need to update my fee agreement and make sure I really love it. I'm gonna laminate that baby, so I cannot change mine right? What am I going to do in the next 60 days. Hey? I'm gonna update the website, get my script organized. What am I gonna do in the next 90 days? Hey, Dana, in order to execute that plan right by month. 3. You're gonna be doing XY or Z. Having conversations, whatever it is.

183

00:43:10.660 --> 00:43:28.280

Stephanie Bogan: it again is just. It's like a a planning funnel. The same way that we think about marketing funnels. Right? We're gonna start at the top. We're gonna get narrow and narrow. We're gonna continue to force our brain and our consciousness to say, How's it working? What do I need to do? So you can see right, there's a lot of sections in here.

184

00:43:28.650 --> 00:43:31.470

Stephanie Bogan: But the goal is right. How are we going to measure this?

185

00:43:31.520 --> 00:43:50.809

Stephanie Bogan: You do not have to go deep into 19 pages of reporting and benchmarking you, Joe,

you might pick 2 metrics, right? Average revenue per client and number of clients per advisor like, what are the couple of data points that are gonna really tell you that you're moving the needle in the direction that you need to be moving it.

186

00:43:53.410 --> 00:43:54.080

Yes.

187

00:43:54.310 --> 00:43:56.449

Natalie Bergsma: and those are

188

00:43:56.790 --> 00:44:19.299

Natalie Bergsma: kind of the high levels. But like get into the quarterly priorities as well. Right? So what is the priority for each of those things? Aaron and I did this recently as A, and one of the coaching sessions is okay. So we have this one page business plan. We have all these individual things. But then we went in. We said, What's the priority? Right? If

189

00:44:19.300 --> 00:44:31.689

Natalie Bergsma: you don't get 100% of this done, what's the one or 2 things that if you get this done it will actually move the needle and create success. Because what I know is when we fill out those plans. The first time

190

00:44:32.380 --> 00:44:49.790

Natalie Bergsma: you all put everything in the first 2 quarters. Yeah, and you all put too much in the first 2 quarters every time we do it. I'm like, Nope, you can't do that now. You have to wait for this. This goes here later. It's really critical exercise to say what's most important

191

00:44:49.790 --> 00:45:02.679

Natalie Bergsma: to me, and then go through that process on a regular basis. And as you get to that Quarterly Business Review, and you sit down here in like quarter to planning, going back to quarter one and saying, Okay, what did we accomplish?

192

00:45:03.170 --> 00:45:29.430

Natalie Bergsma: What didn't we do? That maybe wasn't as important as we thought it was. And anything there needs to go into like the parking lot or our big ideas list again, and what needs to move over. And then one of those upcoming goals and priorities and then re prioritize it, because I think we all feel like, Hey, we set a plan, and it's locked in stone, and it shouldn't move. And the reality of it is, I've never worked in a business or on a project where the plans didn't

193

00:45:29.430 --> 00:45:54.140

Natalie Bergsma: change, where the projects didn't evolve, where everything ended on started and ended on time. So this is what I like to call it's an iterative process, right? Your business grows and evolves. You need a planning process that allow you to grow and evolve with it right? So those are like the big pieces that we need to bring together each and every quarter to keep that progress moving.

194

00:45:54.370 --> 00:46:22.220

Stephanie Bogan: So keep in mind you're not completing the workbook for the year. You're completing



the initial section for the year, and then each quarter you're going through and answering the questions so that you know what to put in the one page plan. If you need that again, additional guidance and direction, some of you will just be like, Joe, be like next year. I'm working on this and this and this, and you'll drop that into those big objectives and each quarter I'll be like, okay, what am I gonna tackle? Right? I'm gonna update the fee schedule or the website, or whatever it is.

195

00:46:22.310 --> 00:46:45.929

Stephanie Bogan: If you need help getting that clarity. The workbook is there obviously calls like this are here right? And we're on tribe email, office hours, etc., one on ones. To make sure, as Natalie did with Erin. We can help you get really clear and focused on a plan to get committed to. I don't care if there's 2 things on it. It's about getting in the habit of picking and progressing. If, Dana, you pick anything

196

00:46:46.140 --> 00:46:58.240

Stephanie Bogan: and you sit down on a regular basis and you work on it, and you get it done. At the end of that you're gonna be feel 1,000 times more productive and empowered than you are, if you're like, oh, I need to get some stuff done this quarter. It didn't quite get around to it

197

00:46:58.520 --> 00:47:15.710

Stephanie Bogan: like our ability to hold ourselves accountable to create a sense of purpose, right? Clarity and progress is what we need to feel good, right? We're always talking about what makes it work. Remember, this is the what it feels good part. I don't care if there's one thing on this page.

198

00:47:15.870 --> 00:47:24.900

Stephanie Bogan: It's about sitting down and saying I'm intentionally choosing how I'm going to invest my time in this practice.

199

00:47:25.220 --> 00:47:45.739

Stephanie Bogan: and to what effect? What are the results that I am choosing to get through that work? Not gonna be perfect, not gonna be right to Natalie's point, right right on point. And every time like that doesn't happen here, it's not gonna happen there. But you hit 70 or 80. You're gonna see that fly will start to move. And that's where we get those hockey stick effects right? It builds and it builds. And it builds.

200

00:47:45.940 --> 00:47:48.209

Stephanie Bogan: So a couple of best practices.

201

00:47:48.260 --> 00:48:11.100

Stephanie Bogan: This is so important. Just get started, then get better. Here's my post it from the beginning of the year. Still, SIM, here, right. Want to do this? Wanna take 6 weeks off or do this? Miss Gail's death? Want to build a happy high performing team right here right there every day. That's my business plan, like it's condensed into a post it so every single morning I can remember, and then we can get better.

202

00:48:11.160 --> 00:48:20.310

Stephanie Bogan: Alright. We can build a team process right? We can engage the team. So it's not about a perfect process. It's not about a 3 day. Exhaustive, planning retreat.



203

00:48:20.580 --> 00:48:40.060

Stephanie Bogan: It's about sitting down, Kevin, Edwin Erin, Laura, and saying, What is it I want to create over the next few years? What do I need to do next year to make that happen. What's the roadmap for change that I need to fill? And then how am I just going to get a little bit better at it than I was before. So again, you can have a post it on your desk.

204

00:48:40.210 --> 00:48:52.560

Stephanie Bogan: and if you use that it will be, and can be just as effective as a 90 page business plan. It's about having something clear to focus on, because that's what governs our decisions and our behaviors

205

00:48:52.990 --> 00:49:25.130

Stephanie Bogan: to sharpen your acts. If you're too busy to have any kind of process, it definitely means you need a process and meditation. We joke that everyone should meditate for 30 min a day, unless they're really busy, in which case they should meditate for an hour. I feel the same way about planning. Hey? Everyone should plan rate, sit down for 20 or 30 min and review their goals and progress for the week relative to the month, year, and quarter. If you don't have time you should spend even longer right? Because it means we're on the flywheel of overwhelm and just get in and do it, and we aren't able to hit the pause button

206

00:49:25.500 --> 00:49:34.390

Stephanie Bogan: and really be a governing regulator in our business. The governing regulator is the person that could sit in the middle of the mayhem and say.

207

00:49:35.140 --> 00:49:53.610

Stephanie Bogan: what do I need to focus on to make what I need to have happen? Happen? Happen it might be working on clients today and getting to planning later. It might be making sure you've got planning in the schedule. But what are the things that you can focus on? If you've read deep work by Cal Newport. Enough color of other favorite books. Right? Essentialism.

208

00:49:53.610 --> 00:50:15.410

Stephanie Bogan: Fabulous book. If you wanna be more successful, you're gonna give up doing about 80% of what you're doing don't freak out because about 50% of that, 80% is fake and factory work. It's not even high value work. You wanna do right. It's putting ourselves in the position to do that higher impact higher value work, which means we can't do too much, which is our notorious habit.

209

00:50:15.540 --> 00:50:34.820

Stephanie Bogan: And then, fourth is, you've heard us say so many times here at limitless consistency, really does compound. If you check in with yourself every week relative to your goals. That awareness is gonna drive action, which is gonna drive right accountability and agency over your practice. That's gonna yield you results that are very different than if you don't do that.

210

00:50:34.820 --> 00:50:58.410

Stephanie Bogan: That's why we look at the marketing data and the results for the quarter. If you do that, that's way Jed looks at his limitless life book every week. Here's what I said I wanted. Here's the time model. Here's the clients I'm gonna work with. Here's why it matters to me. You're constantly reminding your brain. This is the operating system, these these are the GPS instructions. This is what I want to



create. If you don't do that.

211

00:50:59.100 --> 00:51:04.029

Stephanie Bogan: ladies and gentlemen, the world will happily do it for you.

212

00:51:04.340 --> 00:51:15.560

Stephanie Bogan: Your business is like Angie Herbert has this great saying, your business is like a spoiled toddler. It will never get enough time, energy, or attention, no matter what you give it, it will want more and more and more.

213

00:51:16.820 --> 00:51:28.930

Stephanie Bogan: So it's our job to get really clear and sit in the seat of what are the behaviors? Right thought, habits, business habits. behaviour, habits, that we can engage consistently over time, that if we do them.

214

00:51:29.360 --> 00:51:44.570

Stephanie Bogan: if you look at your marketing results every week, even if you're clueless when you start doing it, Joe. and you do it week after week after week. And you're like, I don't even know what this data means. I'm just gonna go Google, it, would you in the span of 52 weeks be a better marketer.

215

00:51:45.340 --> 00:51:55.729

Stephanie Bogan: What do you think? Just best? Guess. Yes, you would. And we're like, I don't know how to market. And I'm like, I don't know how you're gonna get better at it if you don't spend any actual time on it.

216

00:51:55.840 --> 00:52:18.030

Stephanie Bogan: right? So we talk about marketing all the time, but it's not like you. Just go do it, and everything works perfectly, and clients fall from this guy right? We gotta refine a repeat, refine a repeat. We gotta hone the craft and figure those things out. And that's why building discipline of that. What we're really talking about. We're just disguising it. To be more palatable is what we call a professionally managed firm.

217

00:52:18.830 --> 00:52:42.610

Stephanie Bogan: the best advisors that we have in limitless even the solos with very few people that get those killer results have a professionally managed firm. They have discipline processes. I don't care if it's a post it or one pager or the cool one page plan. They have a process for getting clear, getting focused and getting to work each year, quarter and month and making sure right that they're inside the coloring inside the lines if you will.

218

00:52:42.800 --> 00:52:54.300

Stephanie Bogan: So what's most important here is number one. Just get started. I don't care what it is, Joe, if you sit down once a week with your post, and you're like, how did I do this week? That's an amazing start, because next week it'll be like.

219

00:52:54.300 --> 00:53:15.010

Stephanie Bogan: well, I didn't do anything this week, either. Wonder what I'm gonna do next week?



Maybe I'll do this one thing, and then you do that one thing, and then you do the next one thing. And now you're consciously thinking about, what am I investing my time in? Am I that process? That thought. Habit will make you better at the practice, and then, day by day, and very big and small ways

220

00:53:15.010 --> 00:53:23.979

Stephanie Bogan: that becomes your your default behavior. You don't have to wait to set off for the meeting. Edwin's just going to show up and be like. Actually, this isn't aligned. I don't know why I would do that

221

00:53:24.380 --> 00:53:40.080

Stephanie Bogan: great cause. He's training his brain to cross reference. Everything against the goal. Is this what I was looking for? Is this what I wanted? Do I need to change tack. What will it take to do that? Right? So if we do that consistently, our brains can't not help it.

222

00:53:43.920 --> 00:54:09.650

Natalie Bergsma: So as a next step. Right? I love this. Rip off and deploy right. You don't have to create this from scratch. Limitless has built it for you, and you can up, level it or simplify it to meet your needs. I've definitely worked with people where we focus on the one page business plan, and that's like the one thing that we look at every quarter in addition to the financial metrics in the marketing. But right? Really keeping that focus and attention. So

223

00:54:09.660 --> 00:54:27.169

Natalie Bergsma: as you look at what you're doing for your quarterly business view. What's on your agenda, and who needs to attend? So this is a fun one. If you are a lifestyle practice and a solo advisor, and you don't have any staff, or you have an outsourced virtual assistant. Guess what this still applies to you.

224

00:54:27.770 --> 00:54:29.639

Natalie Bergsma: You need to do this work.

225

00:54:29.830 --> 00:54:50.049

Natalie Bergsma: If you are a larger firm right? Who are the key stakeholders in your business? If you're a team of 3 people, it's everybody. If you're a team of 10, right? That's a different story. How much time are you going to spend on it? You're gonna wrap in team retreats. The most important thing that you can do here is set aside the time, and

226

00:54:50.670 --> 00:55:05.000

Natalie Bergsma: I recommend getting away from the office to do this, because as soon as I sit at my desk. The first thing I want to do habitually is check my email, check my calendar, look at my task list. So when I do strategic planning. I leave the office for 2 days

227

00:55:05.180 --> 00:55:11.230

Natalie Bergsma: at the at this time of year for annual planning, and for a half a day I go to a wee work, and I work at a week

228

00:55:11.540 --> 00:55:33.579

Natalie Bergsma: right? Getting into a state and a space that's not going to pull you into old habit. Just remove all the distractions. It gets a lot easier if Joe, sitting in his desk and his emails there, and there's someone coming like it just gets harder. So I have a client who goes to a lot of see runs a billion dollar firm. I'm not making this up, and he goes to McDonald's every Monday morning

229

00:55:34.200 --> 00:55:46.529

Stephanie Bogan: he goes to McDonald's. I was like dude. There are so many better places that you could go. He's like, I just go to McDonald's. I get my coffee and Mike McMuffin, I sit there. I look it over everything before I go into the office. He's just got it

230

00:55:46.620 --> 00:56:08.009

Stephanie Bogan: drilled. He was like. If I go into the office it doesn't happen, and he's like it's my little guilty pleasure. And I was like dude. If if an egg McMuffin keeps you on track, go you? That's between you got in your doctor like workout? It's broccoli. It's gonna be okay. But what he's investing in. Can you imagine, Edwin, if you went to the coffee shop every Monday morning and you just started with

231

00:56:08.140 --> 00:56:21.489

Stephanie Bogan: my life book, and am I on track? And who are the clients, and you just reoriented your entire thinking pro habit process, too. That's right. This is what I'm here to accomplish. Everything I do this week has to write Orient me to these goals and objectives.

232

00:56:21.770 --> 00:56:36.440

Stephanie Bogan: So again to Natalie's point. Right? You don't have to have the Louis Vuitton bag. You can have the fake Louis Vuitton bag. We won't tell. It's about having a process that really serves you and getting clear, getting conscious and getting committed to your priorities.

233

00:56:36.470 --> 00:56:38.039

Stephanie Bogan: So here's the kicker.

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00:56:38.360 --> 00:56:45.509

Stephanie Bogan: You've all heard this a couple of times. Now we like to review it at the end of the year, because it's when we start to wrap up this year.

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00:56:45.530 --> 00:56:55.270

Stephanie Bogan: and our brains start to narrow right. We're kind of cruising into the end of the year. I want you to do the opposite of that. I want you to use the next 60 days as a catalyst.

236

00:56:55.310 --> 00:57:15.319

Stephanie Bogan: This is your kick as clarity time. Where you say, hey? You know what I've learned a lot in limitless. And the next thing I'm gonna chunk away because it's foundational is when I sit down, whether I'm in limitless or not. But let's say you're with us next year. We're doing right our our breakthrough course with our 6 weeks classes on mindset vision and time, or we're gonna help you break this down.

237

00:57:15.480 --> 00:57:41.850

Stephanie Bogan: You should. We'll remind you then. But if you talk, if you do what we're talking about



now, you shouldn't have to build the process at that point, Joe, it becomes, what are the priorities? Right? So what is your process for planning your 3 year vision? What's your process for transparency. Right? How are you gonna know what progress you're making? And then what's your process for accountability? Again, we've built that into the launch process. You can skinny it down. You can deepen it up.

238

00:57:41.950 --> 00:57:49.590

Stephanie Bogan: But it's about going through what we call the Quarterly Business Review to get clear, get focused and get aligned on where you're going to invest your time that quarter.

239

00:57:50.460 --> 00:58:09.140

Stephanie Bogan: Alright, do you guys have questions? I know you've heard this a couple of times, but it's really important as we hit the end of the year to really understand how we're going to enact change in our firm and is not just showing up every day and hoping for a better result. Any questions, because otherwise we're gonna drop into some breakouts and let you guys practice

240

00:58:12.560 --> 00:58:25.199

Stephanie Bogan: overwhelmed with questions. Today, I see? All right, then we'll we'll drop straight into breakouts.

293

01:23:42.610 --> 01:23:43.850

Stephanie Bogan: Alright.

294

01:23:45.120 --> 01:24:06.150

Stephanie Bogan: So our room we talked about vision and clarity. Really some examples of how to curate a big idea. Who I wanna grow next year into a plan that you can sit down with each quarter month and each week, and be like, Hey, it's Isaiah. I know what I'm doing it, you know, to implement my priorities this quarter. I know what I'm doing in the first 30 days.

295

01:24:06.300 --> 01:24:23.940

Stephanie Bogan: the next 60 days in the next 90 days. So it's one of the things I wanted to pull back to the group. And then, Natalie, I'll let you kind of share any key takeaways is when we sit down to break out the, to to build a plan in our head doesn't like an invisible force field to show up where we're like. Oh, no! What am I supposed to do? I don't know

296

01:24:24.200 --> 01:24:35.239

Stephanie Bogan: literally even I don't like I don't know, and then it's about getting tactical and practical and breaking it down. So when we set those goals, and this, if the one of the key objectives next year Jesse is to grow.

297

01:24:35.820 --> 01:24:59.829

Stephanie Bogan: Then. Q. One. It might be right. Build my marketing plan to drive, you know, 20% year over year. Growth like that might be the priority. I gotta do the research. I gotta think about podcasts or blogs. I gotta get clear on my niche. I gotta update my website. But if you know, if you go through that vision workbook, that's where it has, you break down your top. 3 practice goals, personal goals, and professional goals.



298

01:25:00.210 --> 01:25:13.800

Stephanie Bogan: That's very helpful, because, if you know, they are to grow revenue, you know, increase the client size, and I don't get some help on your team right? So that you're leveraged better when you sit down for that 90 days there's a section 30, 60, and 90 days.

299

01:25:13.860 --> 01:25:25.550

Stephanie Bogan: Joe and I went through like, okay, if the goal is to build a Coi, you know growth engine. And one of those channels is the Coi campaign. That's where the worksheet really helps. What do I do? In the first 30 days

300

01:25:25.550 --> 01:25:47.649

Stephanie Bogan: I gotta build my coi campaign and identify a list of right 100 cois. I wanna put through it next 60 day, right next 30 days. Hey? I'm gonna build out that campaign. Get it in my crm update. The copy rate the letters, whatever it is. 90 days. I'm gonna launch that campaign. And I'm gonna have that first meeting with 10 centers of influence

301

01:25:47.820 --> 01:25:56.059

Stephanie Bogan: I went from, I gotta grow. That's really hard. I don't really know what I'm gonna do with my time to how am I gonna grow? Where do I need to focus.

302

01:25:56.090 --> 01:26:15.810

Stephanie Bogan: What do I need to do in 30, 60 and 90 day increments. So just breaking it down into 30, 60, and 90 really helps your brain go. I don't know. How do I get started when that's done? What's next? Oh, to really wrap this up in 90 days. Here's what I'm gonna need to do with the tail end of that. It doesn't mean that you're gonna have every detail perfect and final and clear.

303

01:26:16.020 --> 01:26:16.980

Stephanie Bogan: We don't.

304

01:26:17.200 --> 01:26:20.829

Stephanie Bogan: What it means is, you've got a track to run on.

305

01:26:20.900 --> 01:26:31.490

Stephanie Bogan: and we were talking. If I want to get my train from California to New York, if I just push it across the dirt. That's gonna be really heavy lifting. If I lay some basic track, even a wood track.

306

01:26:31.630 --> 01:26:39.030

Stephanie Bogan: it's gonna be easier. And when I get that really nice track laid where everything just runs smoothly.

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01:26:39.170 --> 01:26:59.999

Stephanie Bogan: Right, we're gonna have very little friction, and we're gonna move relatively quickly, right from one location to the other. That's what I want you to think about with your plans and your priorities is don't worry so much about them being perfect worry about laying the track, because as soon as you start by definition you will get better. So that's one of the takeaways I wanted to share with you



all.

308

01:27:00.200 --> 01:27:02.909

Stephanie Bogan: Natalie. What happened in your room. Good stuff

309

01:27:03.380 --> 01:27:23.149

Natalie Bergsma: stuff, although I think we got really to the breaking point of what our biggest issues are. And we're back in the room. Yeah, here we are. But 3 things, I think, came out. You know, in what we were talking about. And how do we execute on building a plan. One is getting getting stuck on

310

01:27:23.180 --> 01:27:35.380

Natalie Bergsma: what the goals are, and then how to break them down into the actual vision plan. So we started talking about. And I think this upcoming vision workshop that you're they're doing in November will be really helpful, is

311

01:27:35.800 --> 01:27:43.260

Natalie Bergsma: getting getting clear and taking some space away and time away to to really just define what I want.

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01:27:43.270 --> 01:28:03.430

Natalie Bergsma: so that I can then break it down into okay, what is the goal that's going to get me there right. So Laura was sharing, you know, more time and and flow, and, like all the busyness comes in, and it kind of disrupts me. So how do we then turn that into a goal? Right that might be focused on

313

01:28:03.430 --> 01:28:26.789

Natalie Bergsma: creating a better time schedule, or creating boundaries with my clients in terms of when they can communicate with me. Right. Those might be some of the goals we set in place in terms of building other processes, the second, which no one really loved or wanted to talk about except for a couple of people. Which is, how do we turn this into a business system. How do we create a workflow?

314

01:28:27.080 --> 01:28:40.379

Natalie Bergsma: Right? You know. Hey? I've got wealth box. I've got workflows. What's the 3 steps that I take every quarter to do this work, and so I think at a minimum I would share. I didn't get to share it in the meeting. Is it a minimum?

315

01:28:40.550 --> 01:28:49.170

Natalie Bergsma: Put the days on your calendar. That's the base minimum workflow that you need to put in place. Right? Strategic planning day should be a part of your annual planning

316

01:28:49.340 --> 01:29:15.739

Natalie Bergsma: process. So get those days on the calendar so that you have time to work on them. And as you get to your weekly schedule breakdown right, how many days a quarter am I gonna do planning? Maybe it's a half day. How many, how many hours a month am I gonna work on these things? How many hours a week am I gonna work on progress towards my goal? So if you haven't done the annual planning that time calendaring, you know how I'm setting up my schedule. That's a really good place to be.



317

01:29:15.740 --> 01:29:19.940

Natalie Bergsma: And then I think the the third takeaway was is

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01:29:20.100 --> 01:29:27.359

Natalie Bergsma: flowing to execution right? I've got a plan in place. How do I now start executing towards it?

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01:29:28.420 --> 01:29:37.429

Stephanie Bogan: yeah. Time on the calendar after decisions on priorities becomes where the rubber hits the road. If you do not put time on your calendar.

320

01:29:37.570 --> 01:29:49.250

Stephanie Bogan: the odds are overwhelming. You are not. Gonna get really any dedicated, focused time to set your priorities, break them into a 90 day plan. Figure out what to do this Monday versus next Monday. We're just so busy.

321

01:29:49.650 --> 01:29:58.599

Stephanie Bogan: All really successful business owners and leaders make time for clarity, because it's what ensures

322

01:29:58.600 --> 01:30:21.569

Stephanie Bogan: that the energy, time and capital that we're investing is genuinely and truly aligned with our goals for the practice. And I think very much to Laura's conversation when we get on the treadmill, and we're just really busy spinning. We never feel like we can keep up, and we honestly don't feel like we can affect change. So this is that thing that feels really contrary to your system. Your brains, like I'm not taking a time

323

01:30:21.570 --> 01:30:25.110

Stephanie Bogan: 2 days. I'm not gonna go to Mcdonald's every Monday morning.

324

01:30:25.200 --> 01:30:48.409

Stephanie Bogan: I don't really care what system you put in place. It is the system that will save you. It's how you will start to own your time, align your priorities and make sure that the things you say you want and need to do are actually the things that you learn how to attack as a founder. It doesn't mean they're all easy. It doesn't mean they're all gonna whippity snap out 90 days, and it's gonna be perfect. But if we don't build a system

325

01:30:48.630 --> 01:31:08.660

Stephanie Bogan: to create new levels of success, then we're relying on our hardwired operating system. And I hope if you've all gotten anything from limitless this year, it's that without affecting systems for change, thought, habit systems, behavior, habit systems, business practice systems. You are 95%

326

01:31:08.870 --> 01:31:13.320

Stephanie Bogan: hard wired to do today what you did yesterday.



327

01:31:14.000 --> 01:31:28.859

Stephanie Bogan: This whole conversation is about the fact that the odds of change are stacked against you 9 to one. And the only way that we can affect change in the midst of our habits and hardwiring is to use that 5% to exercise agency

328

01:31:28.920 --> 01:31:40.640

Stephanie Bogan: awareness. What do I need? Where is it? Where do I need to be doing? What do I need to fix right action? What actions. Do I need to take accountability? Did I do it? Is it working?

329

01:31:40.760 --> 01:32:10.570

Stephanie Bogan: Not because, William, it's gonna be perfect, right? You're gonna have the perfect marketing machine on day one. It's because you laid the tracks and then you'll hit 12%, and then you'll hit 15%, and then you'll hit 18 and you'll hit 27%, and you'll get to forward one day. You'll call me like Adam, he texted me the other day. He's like, Oh, my! Gosh! Look at all this cool stuff, and I'm like, Oh, my gosh! That's pretty awesome. I'm used to it by now. Go add it. But I was like, Yeah, we go, Adam, but like like, it's great that he sends me this. But I'm like, yes, of course I expect these awesome things from you. At this point

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01:32:10.730 --> 01:32:13.520

Stephanie Bogan: he still gets excited about him, which is awesome

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01:32:13.810 --> 01:32:37.600

Stephanie Bogan: right? But that's his flywheel is. He knows that when he shows up and applies himself. Not that it will be perfect. Not that it will be easy. Not that there won't be economics and effort, but he knows that he is the latitude to create change if he shows up and follows the system right. And again, your job is to define the system that works for you. Your job is just to not.

332

01:32:38.160 --> 01:32:54.179

Stephanie Bogan: What's the word I'm looking for? Don't fib to yourself and tell yourself that you're building a system when you haven't built a system. So a couple of basic takeaways. the business planning process. Right? We've got the vision lesson, the action and accountability lesson, the strategic planning lesson. They're all there to help.

333

01:32:54.480 --> 01:33:10.860

Stephanie Bogan: It's about looking at your calendar for next year. You can do this whether you're in limitless or not. Next year Mondays are still work on the business days. Right. You don't have 9 h worth of work on Mondays. If you put running the shop on Tuesdays, Wednesdays, and Thursdays, which you should be able to do.

334

01:33:10.910 --> 01:33:23.329

Stephanie Bogan: which means you should have time for limitless calls and or other things, right team meetings and rate work on the business. So if you just look at your Mondays you should be able to carve out 2 or 3 HA Monday.

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01:33:23.500 --> 01:33:40.969

Stephanie Bogan: I've got one of our clients. He does team meetings every other week, and then every other week. It's quiet time where they he and the team work on business stuff like, Hey, you've got to go through the click, whatever he needs from the team that week. They've got time allocated. If they don't need it. There's plenty of work to keep everyone busy.

336

01:33:41.000 --> 01:33:49.570

Stephanie Bogan: but they can sit down as a team and be like, Hey, what are we going to get done in the next 30 days, Jay, and do this? Bob's doing this. I'm doing this alright. I know what how to spend my Mondays.

337

01:33:50.020 --> 01:34:01.829

Stephanie Bogan: so you can really go into the calendar. Now, block out that time you don't even need to know what you're gonna do with it yet. You just know you're gonna use it, Isaiah. There's plenty of opportunity to use it.

338

01:34:01.930 --> 01:34:19.830

Stephanie Bogan: Then, as you're wrapping up the year. Certainly, if you're joining us next year and need help with that vision and clarity, we are as I shared with our group that 6 week. Course, we're really doubling down because getting clarity and building plans tends to be the place where people get hung up. So if you pick a priority, and you go. You feel good.

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01:34:19.830 --> 01:34:34.049

Stephanie Bogan: But if you're like, oh, what am I supposed to do next? That's where those invisible force fields right? Those resistance pieces start to kick in. So we're gonna really make sure that we get clear on what you want to accomplish. And why, from a rate a thinking in a mindset perspective.

340

01:34:34.520 --> 01:34:56.389

Stephanie Bogan: we're gonna give you very specific assignments. So if you can do that in advance definitely go for it, there is no downside right. And then how do you translate that into your calendar? So that by the time we get through that queue quarter you really do have this system built and launched and in place, and what you'll find is now you've laid the tracks, it will just deepen and anchor, and you'll get better and better. And 2 years from now you'll be joking

341

01:34:56.390 --> 01:35:07.199

Stephanie Bogan: like Adam. Right? You'll be like, here's my one pager. I got this here like it just becomes a non. It's a non event for Adam to plan now. He just sits down with his team. He's got a process. Everybody knows how it works.

342

01:35:07.200 --> 01:35:21.359

Stephanie Bogan: They do the stuff. They don't hit all their goals every quarter right, but they hit on average a good 3 quarters of them, like most people who have a good process so hopefully, that helps you all get really clear and focus and get to work on getting yourself set up

343

01:35:21.550 --> 01:35:46.549

Stephanie Bogan: to really execute a strong plan that you feel confident about next year by one creating a plan and 2 really curating a system and a process that put you in that founder leader role where you're managing with intention and discipline, not one of my running a billion dollar firm. So I thought you'd all



really appreciate this. I was meeting with them a couple of weeks ago, and he the 83 year old founder, which says a lot.

344

01:35:46.880 --> 01:36:10.559

Stephanie Bogan: and the 77 year old founder, which also says a lot, they said, we've been running this place. Freestyle. Why do we have to get all disciplined about it? I'm like, well, cause you have, like 2 partners who are buying you for millions of dollars, and you got 12 people running around, and no one really knows what's going on or how it's like, well, this freestyle thing is worked out. Okay. But it's kind of breaking down at the 1 billion dollar part.

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01:36:10.590 --> 01:36:21.810

Stephanie Bogan: They are literally struggling with the I. And they've done okay. But how did they get to a billion dollars? They just grew. And what happens when you Bro, when you're when you don't grow? Will you grow the revenue? But you don't grow the operation

346

01:36:22.490 --> 01:36:33.269

Stephanie Bogan: when it doesn't mature with you. Just create a lot. You don't trust me. Nobody wants the complexity of this room. Right? We're spending a lot of time on complexifying this firm to be honest with you.

347

01:36:33.570 --> 01:36:42.860

Stephanie Bogan: So you can grow without doing this. But what tends to happen is you end up sitting in the seat of looking at what you've grown and going? Oh, this isn't exactly what I wanted.

348

01:36:42.910 --> 01:36:54.130

Stephanie Bogan: or it's harder or more complicated, or I'm not making enough right where I'm not keeping enough, or I'm doing the wrong thing. So it's really about aligning your plans and priorities with the goals that are going to put you

349

01:36:54.140 --> 01:37:09.100

Stephanie Bogan: and the seat that you want to be in in terms of your practice, your revenue, your income, the value to deliver to clients, and the time off that you take so hopefully. That gives you guys a little bit more to dive in and dig into plans as you hit 2024, and you know where to find us if you need help

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01:37:09.140 --> 01:37:16.489

Stephanie Bogan: any pressing questions. Does anyone have any questions around their plan, or take aways as we as we wrap up today's call.

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01:37:19.910 --> 01:37:27.560

Stephanie Bogan: Who else got a takeaway? Somebody give me a give. Give us a couple of takeaways. What'd you take away from today. Sharda? How about you?

352

01:37:31.910 --> 01:37:47.100

Sharda Ryan: So now I you know Natalie was great. It's for us connecting like the big picture plan to actionable goals. So that's gonna be my focus is just, you know.



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01:37:47.260 --> 01:37:55.529

Sharda Ryan: do my vision do my big plan and then break it down into okay. What? What do I need to do? You know, weekly, monthly, that kind of thing

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01:37:55.560 --> 01:38:01.940

Natalie Bergsma: awesome. And I think for those of you right who get, you know you get your monthly check in. If you're struggling, you need support. Right?

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01:38:02.050 --> 01:38:07.929

Natalie Bergsma: Reach out. Here's a draft of my plan, right? That. What do I do? In what order? Here's the trick.

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01:38:08.130 --> 01:38:17.120

Natalie Bergsma: Yes, sometimes there's a better order to do things, but just doing things is better than doing nothing. Right? So I think that's a big piece.

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01:38:17.860 --> 01:38:32.310

Stephanie Bogan: Yeah, yeah, I think, Cheryl, put it beautifully in the chat. Get started on 2024. If you can just take right time between now and our call on the twentieth to Natalie's Point. We're gonna do a cool version of visioning that I think you're gonna really dig

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01:38:32.370 --> 01:38:40.880

Stephanie Bogan: that you can use to clarify and use with your team in a really fun and inspiring way. And then you can revisit those plans and priorities

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01:38:40.950 --> 01:38:55.919

Stephanie Bogan: and then hopefully hit the ground running in January with the start of a plan. And again, if you're joining us next year, and you need help defining that plan, we'll be there to help you define it. And to Natalie's point. If you've got drafts, you want to send them back with your check in or post them on, try or email them for feedback.

360

01:38:55.950 --> 01:39:07.589

Stephanie Bogan: Please let us know. That's what we're here to help you with is to get the clarity that you need to get focused and get to work. Move in the needle. Not just this year, but every year beyond. So it's been great chatting with you guys today. Hey, Josh, good to see you.

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01:39:07.630 --> 01:39:29.400

Stephanie Bogan: If you've got any questions, don't hesitate to let us know. But hopefully, this helps you get into a really empowered position to lay out your plans and your priorities for next year. So you know where to focus your time and attention and where to focus your team's time and attention in ways that are actually gonna get things done and create that momentum that I know many of you are looking for.

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01:39:29.610 --> 01:39:33.029

Stephanie Bogan: Yep, Kevin, stop stressing on the goal and focus on the steps.



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01:39:33.170 --> 01:39:51.059

Stephanie Bogan: Our brains love to see the big hairy goal and go. Oh, gosh! I don't even know what to do with that. But the second that we go, what can I do in the next 30 days? What do I need to get done in 60 days, hey? By 90 days. I'm gonna need to have this built and practice on a few people. Okay? So I think to your point, to Natalie's point. We could kind of work from right to left at that point

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01:39:51.280 --> 01:40:15.790

Stephanie Bogan: and build a bottom up plan. That gives us what we need to take that next best step. We just have to create clarity about what that next step is. So again, please feel free to reach out. Let us know how we can support you. And with that, Natalie, thank you for your time and coaching support today. That's always great to have a friends on the call with us, and to have deeper opportunities to break out with you guys so as always, don't hesitate to reach out, but go forth, make it an

365

01:40:15.790 --> 01:40:21.999

awesome week. And just remember how incredible you really are as you build those plants.

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01:40:23.100 --> 01:40:27.859

Stephanie Bogan: can we just underscore the I'm so incredible as I build my plan piece? Please do that.

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01:40:28.180 --> 01:40:32.910

Stephanie Bogan: Whoop-poop! I love the whoop! Whoop! Alright! Guys! Have a great day. We'll talk to you later.

