

HOW TO BE A STELLAR SUPPORT TEAM



CATHY
SUTTER



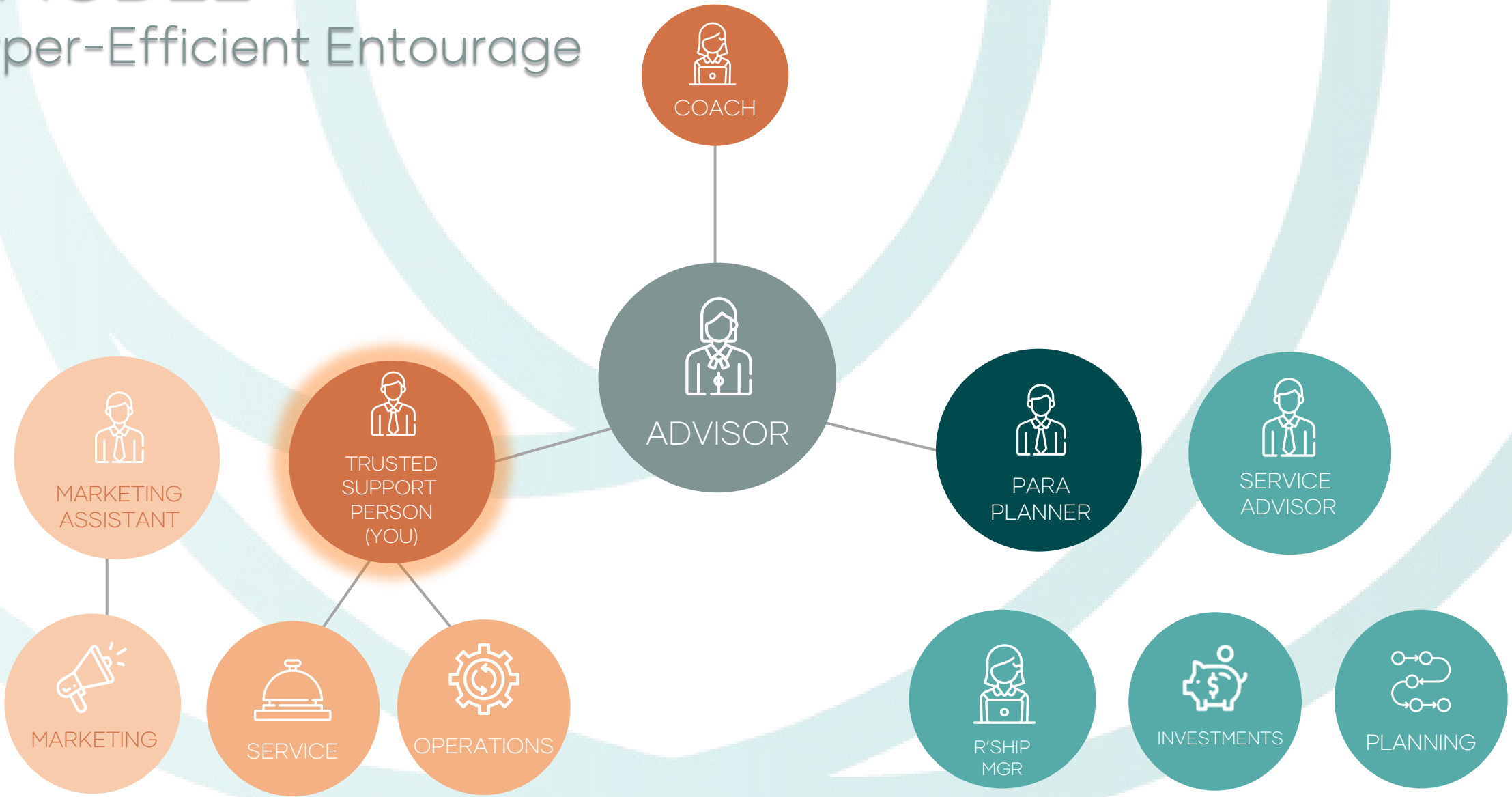
"NOBODY GETS
HERE IN A DAY."

-Cathy Sutter



THE MODEL

The Hyper-Efficient Entourage



CATHY SUTTER
PRACTICE MANAGER



ADAM CMEJLA



KYLE ANDREE:
20/20 Money Producer



MITCH BAYLIS:
Marketing Automation



ADAM FOUT:
Content Writer



GREG WILNAU:
Branding & Design



HOW I GOT HERE



COMMUNICATE

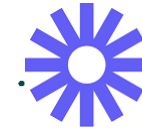
"Educate me."

INTER-OFFICE

- Slack for quick questions
- Asana for non-client related items
(working *on* the business, not *in* the business)
- Loom or screen shots to provide visual details
for virtual staff
- Schedule daily check-in times on the calendar



asana



loom



WORKFLOWS

- Formalize everything that lives in your head
- Constantly refine and add new ones
- Update based on new technologies/integrations

The screenshot shows a workflow management interface for a task titled "Client Service: Non-IRA Withdrawal". The interface includes a progress bar at the top left showing "0/9" with a green segment. Below the progress bar is a list of nine tasks, each with a checkbox, a status icon (person or CS), and a description. The first task, "Client Requests Funds from Taxable Account", has a "Test Client" button next to it. The fifth task, "Client to sign forms", also has a "Test Client" button. Each task has a list icon and a three-dot menu icon to its right. At the bottom of the interface are two buttons: "Mark Completed" and "Add Task".

Task Description	Status	Icon	Action
<input type="checkbox"/> Client Requests Funds from Taxable Account	Not Started	Person	Test Client
<input type="checkbox"/> Confirm Details of Clients Desired Withdrawal	Not Started	CS	
<input type="checkbox"/> If forms are required, send to client	Not Started	CS	
<input type="checkbox"/> Meet with Tanya for Strategy	Not Started	CS	
<input type="checkbox"/> Client to sign forms	Not Started	Person	Test Client
<input type="checkbox"/> Complete any trades required	Not Started	CS	
<input type="checkbox"/> Process Withdrawal in ICP	Not Started	CS	
<input type="checkbox"/> Email client letting them know when to expect funds	Not Started	CS	
<input type="checkbox"/> Review Account Post Withdrawal Date	Not Started	CS	

Learn *(and Love!)* New Technology

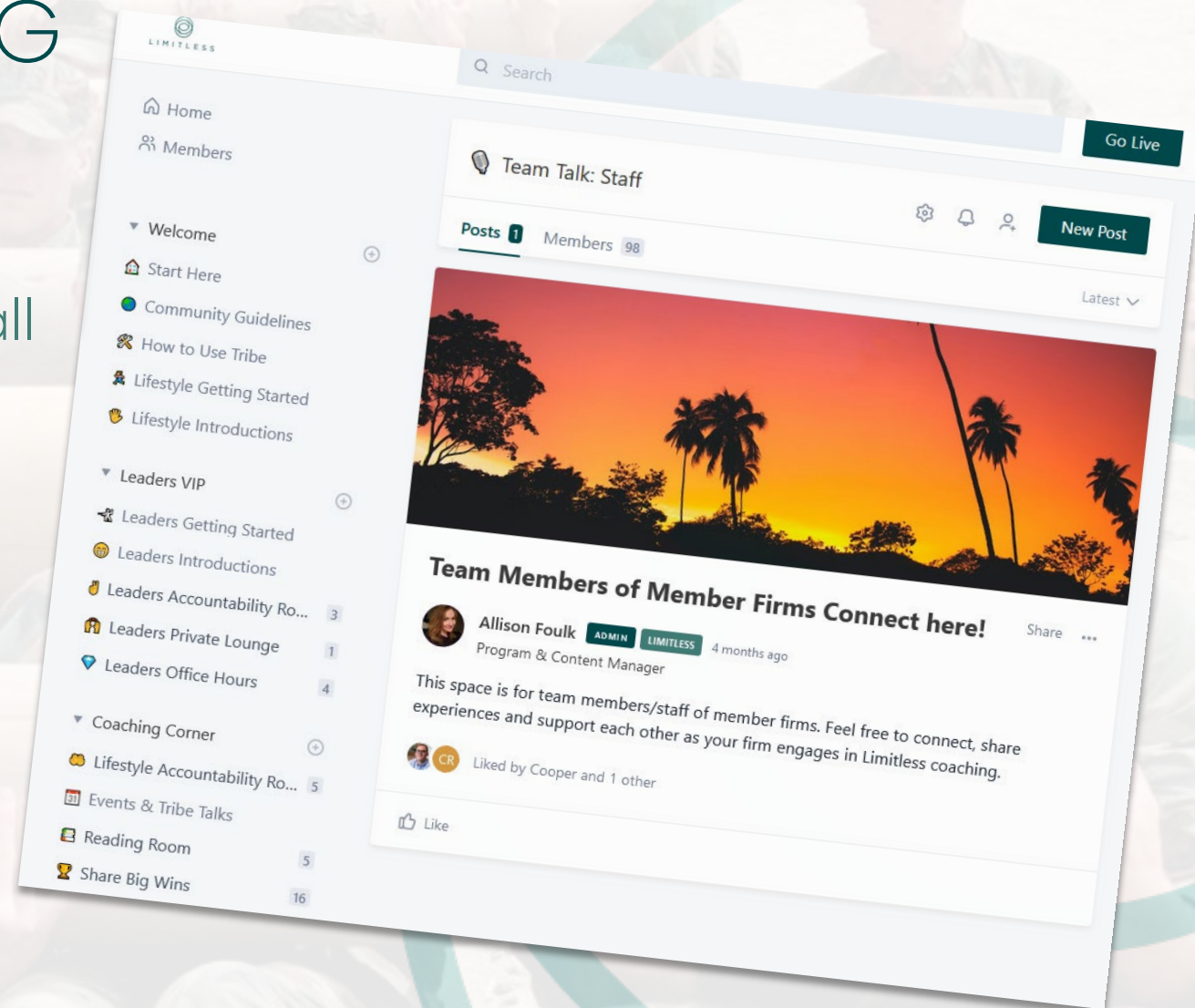
- Check out Kitces Tech Stack options
- Review integrations for your current tech
- See what your CRM integrates with

- Text Expander
- Mobile Assistant
- Slack
- Asana
- Doodle
- Loom
- Jotform
- Acuity
- Zapier
- Active Campaign



COMMUNITY BUILDING & RESOURCE GATHERING

- Find others that can help
- Use Team Talk on Tribe – connect & problem solve in small groups
- Share your contact information in the chat now
- Watch Limitless lessons and download sample resources on members.limitlessfa.life



*If you need assistance with your access to the Limitless site or the Teams space on Tribe, reach out to the Limitless support team:

coaching@limitlessfa.life

ABOVE THE LINE

BELOW THE LINE ACTIVITY

- Decide and prioritize
- Task enjoyment
- Capacity





LEARN MORE

- The Art of Work, Jeff Goins
- Drive: The Surprising Truth About What Motivates Us, Daniel Pink
- The Culture Code: The Secrets of Highly Successful Groups, Daniel Coyle
- The Five Dysfunctions of a Team: A Leadership Fable, Patrick Lencioni
- Come Up for Air: How Teams Can Leverage Systems and Tools to Stop Drowning in Work, Nick Sonnenberg



ADAPT & APPLY

- Use the Above the Line worksheet to determine what is energy-creating for you



TAKE ACTION

- Connect with other Limitless support staff on Tribe



LIMITLESS Q&A