

LIMITLESS Coaching Call Transcript

AUGUST 7TH, 2023

CHOOSING YOUR CHANNEL

LEADERS PRACTICE DEVELOPMENT CALL

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Stephanie Bogan: All right, as we kick off Happy Monday. Everyone always so good to see you. you know, we email and talk and connect. But it's just nice to get together as a group once or twice a month to really just continue our work together today's practice development call is going to be on really choosing our channel. So we're gonna dive into that a couple of things before we do one growth. Retreat is right around the corner. What is it like? 2 weeks, 2 weeks away?

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Stephanie Bogan: Yeah. So just make sure I know some of you are attending lifestyle. Some of you are coming to the leaders portion. Just make sure that your teams are registered. Allison created a space for them and tried to make it simple and easy So if they want to participate, they can go there and then. on the 20 eighth of August we'll be doing our one page Marketing Plan Book Club. If you want to avail yourself of that, if not, no problem, continue to work as planned

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Stephanie Bogan: And then on the 20 eighth. There are not any tribe talks. We're working on retreat takeaways so that just makes it a little bit later month for you guys and is everyone set up for retreat? Have any questions, any issues with your team? What to attend, any, how to make the most retreat questions before we kick off.

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Allison Foulk: Everybody's very excited for our leaders's event, too. We're gonna have a good time to get anyone open the agenda and see what we're doing on Thursday night something about improv that's actually done improv classes, and they're funnier than they were before in all honesty.

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Stephanie Bogan: So we were talking about like, oh, this would be a great day to build into a you know, it's all big and kind. And then we just thought what the team found this place

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Stephanie Bogan: in Denver, and we just thought what a great opportunity that would be to break it can nether and have a good time and connect. And really, you know, just be collegial. But also there's some real skills building in there, and things that we think will be valuable. So we're very excited about about the Improv. On 39 Thursday night there will be alcohol involved. No question. Ask

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Stephanie Bogan: a lot will be needed to make that work

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Stephanie Bogan: this month before we dive into. You know the growth strategies that you're all executing and support you on the implementation. One of the big conversations we always like to have. And I think it's even for those of you who've been in the program for multiple years, right? And are building on your success. It's really important

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to get clear on the channels that we're choosing and how we're leveraging our time, energy, and capable to really elevate our growth, using those channels as tiff can tell of options and opportunities, and when you're good at what you do, and you like marketing, you can really do anything.

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Stephanie Bogan: and if you're not careful, that can be a huge distraction, and when it comes to really succeeding with any specific strategy, Tiffany, I think, will echo with me. Experience really is everything right. No. One starts out in a podcast to Youtube cois, and they just right rush to the top of the mountain and become the hair folded resource. There's actually work involved. And I think that to me is the most important conversation we can have

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Stephanie Bogan: around growth is, let's get clear on outside of the audience. We want to support. What is the channel that we want to with a very intentional inflection, point on the word choose. because it means that we're no longer reacting.

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00:12:14.320 --> 00:12:38.790

Stephanie Bogan: It means that we're being intentional about how we deploy our thought habits right and our time, energy and capital in a way that align with. In this case, our growth calls. And that's what today's conversation is really about. So we're gonna tiff, and I are gonna walk you through kind of the the course content as quickly as we can. And then we're gonna really do some Q. A. And then do some breakouts if we can, after that, to just really have. You talk through



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Stephanie Bogan: what you're doing in your channels, and how we, as a group, and with your peers, can support you as you head into growth. Retreat. So that is our agenda for today. Anything else on your agenda that you all would like to cover.

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Stephanie Bogan: All right, set ready to go

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Stephanie Bogan: right. So let's talk a little bit about having so many choices. I feel like marketing is either one of those things where you like. It's seen it sizzles, and I want to do all of it, or it's so big and overwhelming that you're like, I I just don't even know where to start, and I really hesitate to do any of it. So it's what I call the any or all problem. think of going to the buffet. You have a core dish. Right? You're going to the Asian center or the Italian center, or right, whatever it may be.

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Stephanie Bogan: But that doesn't necessarily mean that you're not doing. Or in this example, analogy, eating other things right. If you have blogging as a primary strategy, you're going to get speaking invitations, and you're going to get opportunities to write. But your core pipeline, your lead gen engine

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Stephanie Bogan: will typically be one primary channel, and then you may supplement that with secondary channels that over time build into significant pipelines of their own. But one of the most effective things we can do for marketing is get really clear and conscious and committed

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Stephanie Bogan: to pursuing and executing on a course of action in the channels that we choose, which is very different than the hodgepodge of right doing something over here for a couple of weeks or months, and then doing something over here for a couple of weeks or months. We were on lifestyle call earlier. Tiffany. Adam and I were talking about this, and one of our members said, Well, I've tried everything, no joke. This happens all the time, like, I did a podcast.

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Stephanie Bogan: And I did this. And I did this. And I said, Okay, well, tell me about it. And he said, well, I did a podcast. Once, a month for 8 months

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Stephanie Bogan: it didn't work, so I stopped doing it. And then I did a Youtube thing where I did like a video a week for like 9 weeks, and then I stopped doing that because it wasn't working. 8 or 9 weeks is not inappropriate even 30 days, or even 6 months Adam was talking about, you know, when he first started his podcast he told his podcast producer, don't tell me about downloads for 6 months. I just don't want to know

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Stephanie Bogan: because it becomes like comparison and a contest right? That first 6 to 12 months is really about laying the tracks in your channel, whether it's podcasting or Tiffany at right cois. It's about getting that groundwork credibility and gaining permission to take it to that next level. So recognize that you should have a primary channel.

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Stephanie Bogan: and that you're gonna have core channels, that support, that which we'll talk a little bit more about.

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Tiffany Charles: Yeah. And then what is your core channel for demonstrating your purpose, or your expertise. So there's really 3 here that we look at audio video and written so in our firm. We have a varying amount of people who would like to do one or the other. so do you like to talk?

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Tiffany Charles: Do you like to perform. Do you like to write so? And then this is really a great place to start on like, where are you gonna like? Choose that entree like what is gonna help you contain? Maintain discipline, keep the behaviors going, going to keep you inspired to keep.

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you know, all the tasks that go with marketing. Stephanie always does it. But marketing is not sexy, it is a process, and so as the sexy piece is getting the prospects through it over time, right like. It's very rewarding. But it really is just what's going to keep you inspired. What's that above the line?

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Tiffany Charles: Energy for you for marketing. so auditory, you can hit podcast radios. You can live stream. You can do so many different things there. video, webinars, the seminars, Youtube vimeos like mute.

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Tiffany Charles: You name it social media videos. And then visual, this is this is where Jared is really, really sure. Actually, Jerry, it's pretty strong at all 3, which is super fascinating, and he doesn't mind any of them. but blog writing and content creation. And so like our CIO He really loves the visual stuff. and he doesn't like video as much. but he'll do it again

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occasionally for certain content pieces just to provide connection and perspective in a different way. and so

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Tiffany Charles: I don't know. I'm kind of curious like, is there anyone who has one that's like this is mine like this is the, this is the core channel.

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Tiffany Charles: Neil.

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Neal Albritton, ChFC®: Oh, probably. Video

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Stephanie Bogan: video, I like it. I can see that about you videos for people who like to talk, but don't mind being seen. Some like a lot of you like to talk. But the being seeing part kinda right pulls you back behind the curtain a little bit.

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Stephanie Bogan: and so much of these are cross-pollinated channels at this point. Right? I swear like I show up, you know, last year I started showing up at podcast, and they had video. And it was like, Come on, I'm supposed to be in my mom, but just giving you good advice. Now, I now like has to be a whole thing. But the cool thing is you can cross pollinate, so we'll talk a little bit more about this when we get to the marketing wheel.

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Stephanie Bogan: The thing that I think is really interesting here is when we talk to people about the different channels. The number one thing that we hear is that they don't think there's right that it's been done. They're not going to do it. Well, there's plenty of opportunity which we'll talk about. It's about finding the format that really works for you. Naturally



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Stephanie Bogan: great. If you hate video, we can get you over the hunt. But you're never going to thrive and shine. Whereas if you're great at content, creation or podcasts, right, there's an opportunity to really invest in the things that we can leverage a lot more rapidly, and then you get to make choices right? There's interview style where you're engaging with people. And then there's monologue where you're on your own, and that's a little great. It's just it requires a little bit more from you. So there's a lot of opportunity.

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Stephanie Bogan: And what I want you to think about is we're not going to leverage any one of these opportunities. We're going to leverage all of them in some form. I should say some of them in some form, depending on what your strategy is.

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Stephanie Bogan: The most important thing is that you have to believe that you have something valuable to share. And I, right, you guys, are leaders, your successful advisors. But there's still that that moment to pause or hesitation when we, when we look at right the the hurdle of climbing a hill to a podcast or a Coi campaign or passion, networking or a Youtube channel.

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Stephanie Bogan: right? We think to ourselves, oh, so much work. I don't know what I'm doing. What are people going to think? And so our job is to really just acknowledge that we do have something valuable to share. We're not sitting here in a round table presidential debate with the top peers in our space, proving that we know what we're talking about. We're literally saying

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Stephanie Bogan: what's on people's minds. What questions do they have? Do? I have some information that might be helpful. So we really overestimate what's required to show up an incredible, knowledgeable way. And it really does. If we're not careful that impostor syndrome or that can't or right, what will people think really slows us down?

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Tiffany Charles: Yeah, this just really echoes a lot of what stuff was saying is those mental hurdles? that often create like that humanly piece of just freezing and not moving forward like I just don't know what to create. Well, as we've mentioned many times this year, Chat Gpt just changes that. Hey? What are the 10 top questions? Retirees are thinking about right now, like, what's you know? What is on to what are entrepreneurs searching. What are the top? 3 topics I can talk about for



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Tiffany Charles: business owners. I don't know if you're seeing it. but there's definitely a trend in like mailbags like, throw a mail bag on your website and ask whoever is following you what they want to learn about right? And you're able to

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Tiffany Charles: right, or think about, or video or audio, any of that? I'm not gonna be good. This one is the one that gets me. I really have to work through those pieces. But I'm always worried about like, what if I just like? Say nothing and it doesn't land, and it's just going to be awful and and it's never the case. by the way, And a big a big lesson there was.

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Tiffany Charles: It just never was about me. Anyways, it was about them, and it's just information that's out there. And, by the way, if it doesn't land, then great, I'll go to the next topic, and we'll make it one that lands. it turns out nobody's rid of healing or cancelling or doing any of that with, you know, topics that we tend to address. So it's really great. no one's paying attention it takes time for it takes time for paying attention. A lot of the stuff that we've done has really

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Tiffany Charles: our client experience. Our retention has been 0 for like almost a year now, and I think part of our retention has been a hundred percent almost for a year. Now, like we've had no clients leave. And I think a lot of that was because

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Tiffany Charles: our marketing like we're still working on like growing and and creating that further brand awareness. But our clients are paying attention. And now they're sending it to people, and we're reaffirming that. And so it's amazing what ends up coming as as you grow or like, we're starting to learn why Youtube is sending out certain pieces for impressions and not others. It just takes time to learn it, and then people are paying attention.

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Tiffany Charles: And I always find it fascinating how like there may not be engagement in certain platforms that we're using. But when I go out to do like traditional marking, people are like, Hey.

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Tiffany Charles: I saw that I really liked that, or how many people like we meet in client meetings and like



Oh, my gosh! I totally sent that own to my friend, and you're like, how did we? You know? So it's happening? it's happening just because we're being consistent. And it's showing up. And all of those things. And I'm gonna look bad like you. You. It's it's amazing

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Tiffany Charles: where we're at from

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Tiffany Charles: any of the marketing pieces now. But it's it's it's almost. It's it's hard to look bad like. There's just it's like the way that content is out there. People are videoing themselves, you know, in there. Oh, that's such a bad example. But I was gonna say, hotel bedroom, you know.

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Tiffany Charles: but like they're doing messy hair and morning with, you know, morning routines. And they're doing all these things that I think it's just this, you know, really getting in tuned with don't allow like that mindset to hold you back. We gotta find the disciplines and just abilities to get out there. And you know, feedback as our friend. If there's just better things that and that really comes from the data, it rarely really comes from other people. By the way, unless you're asking for it in a really really direct way. but it's, you know, getting over those mental hurdles are really important to the disciplines and behaviors that keep you going for the timeframe that you need for these strategies to become successful.

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Stephanie Bogan: And here's the really honest answer. All of these things will be true at some point.

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Stephanie Bogan: I'm not sharing them with you. Tiffany's like oh, it's always going to be amazing. And you're always gonna be a rock star. And you're always gonna perfect lighting. You're always gonna say, no, I don't. Tiffany doesn't Jared like if you go back. We were choking earlier with Adam, like Adams, early videos, right? They're like dark, he, you know. And if you go back, my early videos. The thing about the Internet is they don't take stuff down

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Stephanie Bogan: right. Every video interview I've ever done for the last 30 years is on the Internet. And I go back and I watch them, and I'm like some of the prospect will reach out and they'd be like, oh, I watched all your videos, and I'm like, Oh, you really should have stopped at the last 5 years. And they'll be like, oh, I listen to your podcast. 7 times. And I'm like.



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Stephanie Bogan: what in there could possibly be worth listening to 7 times. And that's not everyone, by the way. But this is the point that we are making assumptions about the quality of our message and content based on our stories.

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Stephanie Bogan: instead of taking action to deliver value and experience and advice that meets them where they are and solves, for their stories.

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Stephanie Bogan: like our stories, are shrinking us. And the thing that I you know, I was listening to Tiffany talk, and I just think it's so powerful we can't let our fear of mediocrity keep us from creating mastery.

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00:24:49.950 --> 00:24:54.050

Stephanie Bogan: and that's what we do. We're like. I'm not going to be good enough, or what about this or

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00:24:54.130 --> 00:25:21.470

Stephanie Bogan: right? We have ideas on our head about how it's perfect and polished, and then, because we can't execute on that out of the gate we simply pull back, and we don't do it. And then we end up in the place of that energy and effort, expending a lot of time doing a lot of different things, often in reaction mode, because they're easier and more accessible. But they're not necessarily tightly aligned with our vision for growth, and the channels that we really think offer us the greatest opportunity. So

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Stephanie Bogan: with with any gross strategy, the mental hurdles are the biggest issue, because on the other side of that is just. Who are we talking to? What's our message, and how are we going to execute consistently and to to Tiffany's Point. It is a science like you're tweaking and exploring. And so if we just get hung up on what am I saying? We and we don't get started. We don't get to get to the point. We're actually creating engagement with people. And we actually improve from there. So that basically, as we've said many, many times. Right talk. Speak

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Stephanie Bogan: to the trash, can. and people ultimately will start to listen, and you can get better and better at it.



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Stephanie Bogan: So let's talk a little bit about the marketing wheel. Any good strategy should always include a SEO, because that's going to be a key driver. You right in Internet searches which are still in the number one way that people find people on the Internet. But as you look around the wheel, I want to sort of apply a concept right? Our ideal client is in the center.

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Stephanie Bogan: and then we marketed them through personal marketing client referral cois, right low, lying, fruit, passion, prospecting as we like to call. That's your personal networking. You go to Yoga class, or you hang out with right wealthy tech execs like it's just part of what you like to do. And then, you know, obviously, things like speaking. So this is where we're putting ourselves out there personally.

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Stephanie Bogan: and that has long been the kind of standing tradition for marketing in the space, and still works really, really well.

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Stephanie Bogan: right? We want to build all that on our brand messaging which we've talked a lot about right story, website, etc. What what a lot of you are really looking at are also one. How do I get really clear and committed

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Stephanie Bogan: and consistent about my personal strategies. Right? Like Dave, you guys have so much referral opportunity. Your clients love you. What happens naturally. But what can we do to commit to that channel and create consistent application of effort? That's what's gonna really create right? That trajectory of growth that we want.

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00:27:19.910 --> 00:27:35.020

Stephanie Bogan: Some of you are looking at those core channels and or just digital marketing videos, audio, right? Content, creation and blogs the number one complaint I hear about this. I know Tiffany and I talked about this a couple of years ago is well, it's already been done.

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Stephanie Bogan: Spaces failed. Oh, my God, no! There are as of 2023, 70, active advisor. Podcast by active, we mean people actually producing things consistently with episodes that haven't dropped off, or, you know, been heard 6 times, or they don't have an episode in the last 90 days. So there's a lot of



stuff out there. There's very little that sticks and gets traction. Why.

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00:27:59.110 --> 00:28:13.909

Stephanie Bogan: everything we've talked about up to this point, right? We got to build a system. There's a lot of head space trash, right? We got like all of those things, or why people start things, do them for 6 to 9 months, and then bail out on them, leaving ample opportunity for all of you.

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Stephanie Bogan: Patrick King, one of our advisors, is super successful on Youtube. He's gone through a lot of channels. He really landed on that early last year after finding his niche. And it's gone, really, really? Well, so we were talking about that earlier today with the lifestyle group. And someone was like, Yeah, but there's so much financial advice on Youtube.

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Stephanie Bogan: Do you know how many actual financial advisors have established an active Youtube channels, advisors not random 30 year olds dispensing correctly advice. 30,

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Stephanie Bogan: 30.

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Stephanie Bogan: Do you know how? It's one tenth of No. 1, one hundredth of one of the 300,000 advisors out there like it's infinitesimal. But we see someone doing something. And we think, Oh, someone's already got that podcast. Check the box up. Some is already doing that of someone's. Already, you know, everyone's following up with cois, 90% of people that have to doi relationships do it horribly.

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Stephanie Bogan: So there's no one right channel. When we do research everything that people say are the best. Things are also the things they say they're working. Seminars are amazing. Seminars are awful.

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00:29:15.710 --> 00:29:28.689

Stephanie Bogan: Webinars are amazing. Webinars are awful. Referrals are amazing. Referrals are awful. It is all about the seat that you sit in with relationship to that channel, and then how you commit to executing around it

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00:29:28.970 --> 00:29:44.989

Tiffany Charles: so tiff. Do you want to talk a little bit about just really making sure that you're understanding your market and what they care about and baking that into your channels. Yeah, this is really foundational, like, before you go in, because otherwise you could be just. You're pushing in too many directions. Right? You're just looking at

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00:29:45.200 --> 00:29:55.689

Tiffany Charles: you. You're getting out too many confusing messages. You're just trying to hit. It's spaghetti at the wall. And so this is how we really make that bento box right? That we talk about earlier in the year. But

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Tiffany Charles: understanding your target market and what they care about. So getting really clear getting clear on. What do they do? How do they do it? Where did they go to collect information? what's their top searches right now? All of those types of things. clarifying those needs and pain points like, what are the motivators that are going to get them there? this is something that's been really interesting for us from the entrepreneur aligned area. The retirees, like the motivation, is

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00:30:19.580 --> 00:30:37.600

Tiffany Charles: pretty clear, and it's there, and we can hit on it in several different ways and just consistently hit there, whether it's technical or emotional, like we can hit both sides of that And then the entrepreneur, the ones that we're going after. It's an interesting space, because it's not in that like

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Tiffany Charles: family office, like, we're totally successful space. So like, what's motivating them? And where do they then prioritize wealth management into that And then clear, concise, and compelling storytelling. So

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Tiffany Charles: being really clear, we've there's that brand messaging. But what are those like 5 keys messages that you're gonna hit on right? Like as we've created? Jared did it in a tribe talk? But our assessment. We've really created that that those 4 pillars and we're going through them consistently that has been huge on, like our content calendar. The ways in which we're presenting how we're getting out that information and how it's

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00:31:14.380 --> 00:31:35.260

Tiffany Charles: being received. So as we've gotten clear on our story, that we're definitely getting more opportunities, and it's landing in a much bigger way. So this, I think, ha! Is very foundational and very



important to go through these exercises and get there. I don't want it to prevent you from like. Oh, this is where I've been stuck for years. Right like this, I do think.

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Tiffany Charles: is a piece where people just get stuck so they don't start

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Tiffany Charles: But like, even if it's as simple as like, what are the you know? What are the 4 technical pieces that they have. And what are the 4 motivators? They go from feeling this way to feeling this way. And you start there like that's going to be a good place. But if you can really get through those exercises this stuff has set up and limitless to set up, it'll be huge so that you can then create what platforms and channels and the ways that you're gonna go about it.

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Stephanie Bogan: Yeah, this is really important for the very simple fact that the number one issue around driving into these channels from for many people is content right outside of the system and the conversation. It's what am I going to talk about whether it's sitting across from a Coi or sending an email to a relationship or doing a speaking engagement or writing blog content, or Youtube. You know that there's this inherent pressure to constantly come up with contact. And I have days where I'm

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Stephanie Bogan: I'm like, I have nothing new to say. Everything's always been, you know. It's already been said. And then I, for, like 17 min later, it'll be like, I have 19 ideas running. There's just no shortage. But what we do want to do is put it in the container of Who's the ideal client.

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00:32:42.540 --> 00:32:59.100

Stephanie Bogan: and what are the pain points and needs that we're speaking to Many of you remember Kyle Walters from last year? Right? He has this Sunday video. And it's literally just whatever is going on right now, right like, what's the impact deflation on my portfolio? Why do you? Stock market returns matter? I mean, like

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00:32:59.120 --> 00:33:28.559

Stephanie Bogan: basic conversation. And to Tiffany's point, right? Her entrepreneurial clients will have slightly more complex or complicated conversations. But there's still basic conversations around time, energy, capital making smart decisions. Right? How do we move the levers. This is too complex, like it's the same conversation from family to family. It just rate the details tend to change. So the sooner we can get clear on this that really allows us to home the marketing and the messaging that we do inside each of these channels.



119

00:33:28.640 --> 00:33:42.230

Stephanie Bogan: So again, on the personal side, you. Really, you've got to speak from a place of authenticity. We're so afraid to find our voice, and when we do find it you are without question, going to eliminate some people from your Prospect Pool.

120

00:33:43.620 --> 00:34:15.280

Stephanie Bogan: But what you, at the same time we're gonna do is radically elevate your stock with the people that stay in your pool because you're really speaking their language. 2. Once you've found your voice and you're willing to show up with it unapologetically. Step 2 is to figure out, how do I show up where my market is? Plant referrals is pretty straightforward, right? It's the low, lang fruit. We don't tend to spend a lot of time here. This is a channel. If you just double the number of client referrals with a wee bit of effort. What would that mean to your growth with very nominal effort. Relatively speaking.

121

00:34:15.320 --> 00:34:32.490

Stephanie Bogan: same thing with centers of influence. Many of you have a lot of them, right? You've touched base with over the years. You've got a lot of them buried in your client files in terms of their supporting cois, and we don't have them in a channel with a really intentional campaign, where we're consistently dripping on them in a credible way.

122

00:34:32.699 --> 00:34:47.420

Stephanie Bogan: So that's the third leg of the stool, whether it's speaking or Ceos, or referrals, right or showing up at the Yoga, or the mountain biking, or the the rotary event. It's your consistent demonstration of capability.

123

00:34:47.480 --> 00:34:57.880

Stephanie Bogan: an authentic ongoing connection. If you show up in a credible and likeable way over time, you will ultimately pick up traction in that space in terms of opportunities.

124

00:34:57.880 --> 00:35:18.199

Stephanie Bogan: So when it comes to the personal stuff we tend to ad hoc it because it's personal, and it just shows up in the calendar here, there. I'll talk to Bob or Jane and Jackson and a referral. But when we bring order and organization to this, and we treat it, no different than a podcast or a Youtube channel or anything else. That's where you really start to get those optimal results on the organic roadside.

125

00:35:18.230 --> 00:35:38.160



Stephanie Bogan: So we tend to skip over this because we're talking about digital, and it's sexy, and it sizzles. But I think what Tiffany, what like this is the core growth for most firms, and we step over it to go do new cool stuff. And that's okay, if that's your primary channel. But if the one of these or some of these are your core grow channels start here really nail that

126

00:35:38.410 --> 00:35:51.469

Stephanie Bogan: because it's near term revenue and growth, while you're simultaneous looking at longer term channels to help build a broader pipeline, whether it's right, Youtube, a podcast right legion referral systems, whatever it may be.

127

00:35:51.600 --> 00:35:55.270

Stephanie Bogan: But the goal is to really get very clear about how you're going to do that?

128

00:35:56.920 --> 00:36:16.509

Tiffany Charles: Yeah. And then what does it take like choosing your platform as we talked about just a few slides ago? So are you gonna do it via video, when it comes to the digital marketing is an important piece, because it's re for either you're getting it out there. And you're creating brand awareness. And or it's reaffirming to those traditional means in which you're getting it right, like the cois.

129

00:36:16.510 --> 00:36:40.260

Tiffany Charles: If they're referring somebody in it gives them opportunities to just there's expertise, credibility, skill, all of those things that show up there. So just choosing video audio written again, it could be all 3. defining your position. I'm sorry. I don't know if you guys heard that that was my dog. he's like 12 and can be gross. So if that was if I made a face it was cause he

130

00:36:40.580 --> 00:37:08.020

Tiffany Charles: but And then just be consistent like digital marketing is all about consistency and showing up as yourself. Don't be different, like if they're going to get you in that prospect meeting or that client experience. If you're showing up one way, and then you're very different, the other. It's a beer disconnect because you're essentially in this digital platform, right? They're in this in for the information gathering mode.

131

00:37:08.020 --> 00:37:13.170

And then they're coming in to buy. And so if that is such a, if it's such a like.

132

00:37:13.580 --> 00:37:33.740

Tiffany Charles: while they're doing that, such a different experience, it's gonna be a big disconnect



there, and with trust being one of the biggest things on the line here in order to get our prospects and and for them to choose us. It's really really important, that authenticity that comes all the way through. It's very much you and that you're again just consistently putting it out there.

133

00:37:33.930 --> 00:37:47.100

Stephanie Bogan: Yeah. And again, going to that, we tend to think that the the digital world is filled up, that you know the Roger Whitney is the tailors, the atoms. The Tiffany, like they're already there. And so the opportunity window is very, very narrow.

134

00:37:47.150 --> 00:37:54.150

Stephanie Bogan: we did a little research going into this. There are currently in 2023, 70 active advisor podcasts.

135

00:37:54.310 --> 00:38:12.810

Stephanie Bogan: Now, there are hundreds of advisor podcasts. But there are very few of them in the aggregate that right show up consistently right? They're actually really deploying the strategy versus, hey, I did right. The client we were talking about earlier, who did it for 8 months and then stopped his podcast is on the list of every podcast out there.

136

00:38:12.950 --> 00:38:25.960

Stephanie Bogan: But it's not one of the 70 active podcasts. So when you think about the fact that there's right 300,000 350,000 advisors out there depending on the stats that you look at. That's literally less than one tenth of one tenth of one

137

00:38:26.410 --> 00:38:38.809

Stephanie Bogan: of advisors that are doing podcasts. And what we know from all the research is, these digital channels are growing, and they are starting to get traction in terms of starting to shift the balance of growth from organic

138

00:38:38.830 --> 00:38:42.030

Stephanie Bogan: right to more of this intentional growth.

139

00:38:42.490 --> 00:39:03.489

Stephanie Bogan: there are 30 Youtube channels as we talked about again, not counting anybody under the age of 30, dispensing financial advice on Tik Tok, but on Youtube there are only 30 core advisor channels. So again, when you think about style and preferences, there are people that are never going to call me because they're in that like, you know old school stodgy corporaity



140

00:39:03.490 --> 00:39:27.510

Stephanie Bogan: use big words way, and that's fine, like, I don't worry about it at all, because I don't want to spend any energy trying to meet them where they are right. I want the Jens and the Needles and the Lyles to be like. Oh, my gosh! We love what they're doing. And we want to lean into that kind of firm, and that creates a gravity that really draws people in. So I think to tips Point. It's about choosing that channel, and really consistently showing up with your authentic voice.

141

00:39:28.210 --> 00:39:31.110

Stephanie Bogan: The other big conversation is distribution.

142

00:39:32.530 --> 00:39:42.740

Stephanie Bogan: So you have to choice. Michael and I talk about this all the time, Tiffany, you and I've talked about it on a number of occasions. We have 2 distribution channels, we, but we build them or we borrow them.

143

00:39:43.110 --> 00:39:58.380

Stephanie Bogan: So if you go on someone else's podcast, Jennifer, right? You're what we would call a digital sharecropper. Right? You're borrowing right? Their land, their audience, and you're in this case trying to convert some of them over to your audience. And that is a very clear strategy. And it works, by the way.

144

00:39:58.680 --> 00:40:20.939

Stephanie Bogan: The other strategy is building your own audience. Right? You're gonna do your efforts, your digital, your social, your client referrals, your click, the button Adam actually has a business card. He was showing it to me earlier. So his business card when he goes off to events, isn't a typical business card. It's actually a square card that has the promo for his podcast on one side

145

00:40:20.990 --> 00:40:49.489

Stephanie Bogan: it is contact information. When you flip it over, it's got 4 QR. Codes for each of the podcast platforms, apple, spotify, etc. So whichever one in doing that, by the way, he's very intentionally or knowingly, omitting people who don't have a pot who don't listen to podcast so when you're passing that out, 8 out of 10 people, optometrist or otherwise, aren't listening to a podcast so you might think, oh, what is he doing? That's madness.

146

00:40:49.510 --> 00:41:14.720

Stephanie Bogan: What he's doing is in that sea of opportunity, finding the people who are prime for his



channel, because it's hyper leverage for him if they listen to him X number of times. What we know is some percentage of them will call, and as you all have heard over the last couple of years. He's gone from our standard sales process to more like the one that we have here at limitless, where someone calls. You talk to them for 30 or 45 min. And they hire you

147

00:41:14.960 --> 00:41:31.890

Stephanie Bogan: because all that trust, equity and relationship alpha happened in the podcast over time or in the blog or in the Youtube Channel. And so by the time they call, they're already invested, they just want to vet you and know the process. So what you're really trying to build with these channels is distribution.

148

00:41:32.530 --> 00:42:02.149

Stephanie Bogan: So you want to have your core distribution strategy, how are we driving people to the podcast, to the Youtube. Right? How are we finding new coins? And then you want to have your sharecropper strategy, which is for many of you. You'll use that to build up that distribution list that you own, as you kind of right by land of your own, if you will tiff. Do you want to talk a little bit about what? Where you guys build your own distribution, and then some of the things that you do right to build it through partners and alliances and write podcasts and speaking and things.

149

00:42:02.470 --> 00:42:12.859

Tiffany Charles: Yeah, so we're working really hard to build ours through digitally. So definitely through social media LinkedIn, Facebook.

150

00:42:13.340 --> 00:42:37.249

Tiffany Charles: Instagram and Twitter right now. but we may be cutting a couple of those down Facebook really solid for the retirees. By the way. The boomers are pretty heavy there and then. our linkedin, I feel like twitter was supposed to be really there for the entrepreneurs, and we just haven't quite got there yet, but we'll see and then certainly through our lead nags and those types of things through our website

151

00:42:37.250 --> 00:42:53.849

Tiffany Charles: subscriptions. Our CIO mail bag, those types of things and our webinars. those are all areas in which we're building our own list and getting more opportunity there and then. we we do presentations for some entrepreneurial communities.

152

00:42:53.850 --> 00:43:11.670

Tiffany Charles: we get asked to do presentations in the industry. and we have a few others. So we primarily do our borrowing audience through thought leadership. and or presentations. and that's been



really, really great as well.

153

00:43:11.900 --> 00:43:31.890

Stephanie Bogan: yeah, you basically co-OP them, have an offer, right? A lead Gen or something else. You say, hey, you can write, follow me on twitter or this at the end of your podcast or your blog, or whatever it is. And you're trying to convert. So we've got 2 conversion streams. And that's one of the conversations we don't talk about a lot is we all talk about like conversion in terms of the lead becoming a prospect.

154

00:43:32.010 --> 00:43:41.870

Stephanie Bogan: But there's a secondary conversion stream that's almost more important than that, because it just becomes math after that which is your lead gen conversion, like, how many people can you touch

155

00:43:41.870 --> 00:44:03.900

Stephanie Bogan: that? Say, here's my email so that you can keep communicating with me because outside of the people that act right away, that is your largest opportunity pool. Because they're here. They're interested. They're reading your content. Maybe not every week. But it's like I have stuff that I follow. And I'm like, how did I get on that list, and I'm constantly deleting it. I have about 5 things, Seth Goden.

156

00:44:03.900 --> 00:44:11.220

Stephanie Bogan: right? A couple of other things where I'm like. I don't read it. 90% of the time it shows up in my inbox, and I'm like I'm busy right now. Put that my reading folder.

157

00:44:11.230 --> 00:44:31.640

Stephanie Bogan: but in my brain I've gotten enough good content out of those messages that I'm afraid to unsubscribe, because on those days that I don't want to miss them. Awesomely insightful, Jim. Right? That's the kind of connection. And, Fomo, that you're trying to create. No one's gonna read or listen or show up for every single thing that you do.

158

00:44:31.670 --> 00:44:46.820

Stephanie Bogan: It's about. Can we be consistent enough that if we show up it's inevitable that we'll touch on them in a way that will move them up or out, and those ups are either to our digital, like our Legion nurture, email strategy or right to direct conversations.

159

00:44:49.300 --> 00:45:09.769



Tiffany Charles: All right. And so striking a balance like, I think it comes down to again. We've talked about this a few times in the past, but there's a ton of strategies. You can't work them all, and it is really important to think about, like what is easiest for you. And then I don't know if any of you have read that like that tenx

160

00:45:09.810 --> 00:45:34.620

Tiffany Charles: tenx is easier than 2 x that will be going through But like what compounds over time? and that you can compound over time. So what can you consistently do? What can you recycle? How does that go out like? Are there pieces right? So if you're writing a piece of content? Is there a way to turn that into a really awesome real for social right? Is there? And then is there a way that maybe later, that becomes a video, or just

161

00:45:34.620 --> 00:45:51.630

Tiffany Charles: each piece of that. But and then is that creating the followers and the outcomes that you're looking for. But the compound piece is really really important. because otherwise, that's not energy. Where everyone's like, I'm just gonna give that. This is what happens at like that 6 to 8 months, where it's just like

162

00:45:51.640 --> 00:46:20.069

Tiffany Charles: the work that I'm doing is not creating the results. It's not creating more opportunity. Part of that is also data following. By the way. Which is why that marketing dashboard that stuff sent out is super important. because oftentimes we're just like seeing like certain data, we're not recognizing like what could be behind that, or that it actually is progressing. And if we just did that again over the next 6 months, and we doubled, what was there that it would be highly impactful. so definitely check out that dashboard and create that. But.

163

00:46:20.070 --> 00:46:25.009

Tiffany Charles: Jen, what do you think is the easiest for you and what it may compound over time.

164

00:46:27.160 --> 00:46:34.510

Jennifer Patterson: It's easy writing. because I can just write the ideas to capture them.

165

00:46:34.650 --> 00:46:37.079

Jennifer Patterson: even if I so

166

00:46:37.260 --> 00:46:50.729

Jennifer Patterson: what I've learned is what I've done is actually in the song I now have, like a a list of



potential blog posts. So it's like, Oh, I have an idea. Let me just write that down, and if I have a lot of ideas in it, I'll just write right. Right? So when I go back to actually having to write.

167

00:46:50.760 --> 00:47:00.750

Jennifer Patterson: Then it's it's there and then we can. Then the compounding is turning it into other content. And also I, I actually just started to type a second ago that

168

00:47:00.760 --> 00:47:28.019

Jennifer Patterson: I learned a long time ago. There's Brendan Burchard who's been out in the thought meter space for a long time was one of my mentors, and he actually told us that he's like he had one or 2. He would recycle his post. It's like it's my point. So you can find, even if it's just like a basic cash flow thing or something that gets hits that you can recycle that every 90 days. And most people aren't even going to notice. It's not a blog post. It would be out in your social. So I for me, it's the writing.

169

00:47:28.900 --> 00:47:48.540

Stephanie Bogan: Yeah. I love that. Go ahead. Yeah, I think it's great that one of the things when I was listening to Tiffany talk right when we think about the structure that we want to follow one. You're gonna have your strategy, right? Which we've talked a fair bit about 2. You're gonna have your structure. How am I actually going to do this consistently is the second most important question that you can ask to Tiffany's point

170

00:47:48.540 --> 00:48:08.180

Stephanie Bogan: 90%. Probably 99% of these efforts think about the number of podcasts, Youtube's blogs. And like one of them, actually, right, continue on in the consistent manner and are able to get traction. So what's the structure? How much time are you blocking it? And then that really leads to the third thing which is support?

171

00:48:08.370 --> 00:48:28.319

Stephanie Bogan: So Adam and I were talking earlier. Tiff and Jerry and I have had like it's all you hear me say this all the time. It's all about leverage, right? So Chat Gbt is a great piece of leverage. Now, what are the top? 10 questions on retirees? Right? You can go to those Google Web boards and see what? What are the top 10 searches or top 50 searches around financial planning or investments or retiring.

172

00:48:28.620 --> 00:48:44.430

Stephanie Bogan: But it's really about, how do we sit like? Are you hiring someone to help you produce the podcast, you have right, a writer or someone helping you with the content, like the more support we can get in place because we have some thing that we love doing, the ideas and the inception and



173

00:48:44.430 --> 00:49:04.810

Stephanie Bogan: right, how do we share them? Tends to be the part that we like, and the execution is less exciting. So we tend to, I think, very much to Tiffany's Point, get excited about the strategy and the cool stuff we can do, and we forget about what are the support mechanisms we need to put in place to actually make this one of those discipline consistent strategies, and 2

174

00:49:05.020 --> 00:49:10.970

Stephanie Bogan: which we've touched on, but we don't execute. Well on. Is this idea of what I call content stacking?

175

00:49:11.510 --> 00:49:30.890

Stephanie Bogan: We, we think about that marketing wheel that we were looking at with the client in the middle. Once you define your growth strategy, your primary legion, whether it's a podcast theos, etc. And the larger you get, by the way, that wheel in the middle is all of them to varying degrees, because you're pursuing in many cases more of those channels.

176

00:49:30.890 --> 00:49:56.609

Stephanie Bogan: you will still always have a primary one. Ken Fisher, one of the largest firms out there, right? They still to this day get over 70 of their leads through their email campaign. It's a science over there. They have home this to like literally, NASA level data analytics. If we do this, we can expect to get this kind of result, and it's built up. No judging right like it, or don't like it. It's built up one of the largest firms in our space.

177

00:49:56.710 --> 00:50:24.449

Stephanie Bogan: So it's not about a right or wrong channel. I think to this slide. It's about picking one that's comfortable for you, and then making sure that you do. The activities that are gonna consistently compound stacking is leveraging outside of people. But now you're saying, hey, if my core content is in the middle. It's my podcast. Content. How do I each time go back into the library? There's A, I think it was the perfect podcasting lesson with 5 com at last year's growth retreat.

178

00:50:24.560 --> 00:50:43.439

Stephanie Bogan: or they went through podcasting. But they gave a really great example of how you can what I call content stacking. Take any episode of a podcast and turn it into 41 other marketing touch points that podcast it could become 12 blogs, right for social posts, one speaking in gate like.

179

00:50:43.440 --> 00:51:00.149



Stephanie Bogan: you can literally take a video and turn it into a podcast in the blog, you can take a blog and turn it into. So basically everything is a chameleon. You're gonna create it in your core channel, right? Jen loves to write. So the first part of that's probably going to be writing. But she might say, Hey.

180

00:51:00.150 --> 00:51:23.870

Stephanie Bogan: I'm gonna do 2 quick socials with a tiny snippet of video. If she's comfortable doing that right to cross leverage those channels, and it might be 30 s of something. She uses a teleprompter at 4, and records 4 or 5 times until she gets it. But it all she needs is that 30 s of personalization to have that hit be 10 times better on those social media channels.

181

00:51:24.010 --> 00:51:50.320

Stephanie Bogan: If you put that structure that creates scale, hey? I don't ever just produce a piece of content. Every piece of content goes through right? This the strategy Smorgas word, how are we using it for blogs. How are we? So in our larger firms we literally build up marketing machines where the model is right, each piece of content goes into a model. It turns into 4 blogs. 2 articles, right? One speaking engagement, 2 like

182

00:51:50.500 --> 00:52:05.940

Stephanie Bogan: it's just wrote, it's just what happens. There's no like. it's just we had these topics. And in a podcast or a video, for example, you might have 5 or 6 topics. Right? And then you take those out and you could take one podcast or one article that Jen writes.

183

00:52:05.940 --> 00:52:16.949

Stephanie Bogan: and turn that into 5 separate blogs, each of those blogs, then branches off into right, 3 to 5 social media posts like. So you can very quickly cover a massive amount of territory

184

00:52:16.950 --> 00:52:38.689

Stephanie Bogan: really efficiently. But if you don't have that model right, what is the strategy. What is the structure? Then? It can just be like you're throwing yourself everywhere in that share. I'll I'll go here. I'll do this. I'll talk that. And it doesn't mean it won't work. But you guys feel that right to spend in that spot where it's like, Wow, I'm working awful hard, and it's working.

185

00:52:38.870 --> 00:52:46.209

Stephanie Bogan: but it feels like it should be working a whole lot better relative to the effort I'm putting in and the value that I have to deliver.

186

00:52:46.520 --> 00:53:00.279



Stephanie Bogan: So this one really is about, choose your channel. Commit to a consistent course, and consistency. Compounds like that is the formula we tend to think we're not ready. We're not expert enough. It's you know what it is required to be an expert.

187

00:53:02.050 --> 00:53:03.860

Stephanie Bogan: Anyone want to know what secret is.

188

00:53:05.380 --> 00:53:18.279

Stephanie Bogan: You have to show up 7 times in an expert position. What is an extra position? A blog, a podcast you know, you got quoted in Cnbc, literally, there is a mountain of research around trust.

189

00:53:18.280 --> 00:53:38.310

Stephanie Bogan: And what it says is when someone's brain sees you. Your name, your brand, your representation 7 times, and they haven't been eaten by a tiger, their brain will move you over into the will, not eat me. Space might be safe, and might now set down the guard and actually listen to what you have to say.

190

00:53:39.070 --> 00:53:50.840

Stephanie Bogan: That's why consistency with those cois like. Think about every coi that went to a lunch with Tiffany or me, or you got when I was in my twenties meeting with people I was like, why do they keep saying they love us and nothing happens. It's making me crazy.

191

00:53:52.050 --> 00:54:03.140

Stephanie Bogan: It really is about just getting clear on how you're going to position the expertise that you have and claiming it. I love to tell the story. I was 24 years old. I went to my first Fpa. Conference

192

00:54:03.290 --> 00:54:14.659

Stephanie Bogan: and one of my clients, Norm Boone. walked me over to Bob various, and we had a chat, and then Bob walked me over to the financial planning booth and said, I think you should have this girl write an article, and I was like.

193

00:54:14.980 --> 00:54:15.710

shit.

194

00:54:16.330 --> 00:54:30.690



Stephanie Bogan: What if they say yes, which they did. And then I was like. Okay, now, I'm gonna like, now, I have to show up with expert level stuff, and the pressure was like, Oh, my God! And then I wrote the first article and got like all these things, and I was like. Oh, my God! They know nothing. I say that with all the love my heart.

195

00:54:31.590 --> 00:54:42.769

Stephanie Bogan: I was like, you just have to be a couple of steps ahead of your audience, and in our case, and in your case you're a thousand steps ahead of your audience, like none of us are in our twenties anymore, just starting out

196

00:54:43.230 --> 00:54:43.950

Stephanie Bogan: like.

197

00:54:44.170 --> 00:54:54.780

Stephanie Bogan: except for Neil, he looks like he's 20. Right? My, I would. I would make a girl joke about how you still act like you're 20. If you were my husband I would make that joke. But you're not so I won't

198

00:54:55.380 --> 00:55:20.279

Lyle Rosman: right. That's the problem with getting older. I don't feel like I still feel like I'm 30, but my body is telling me it's 50. I don't understand.

199

00:55:20.370 --> 00:55:41.020

Stephanie Bogan: So again, like it's all about demonstrating your expertise and your empathy right like your likability and your your reliability and your trustability are just showing up over and over and over again. So the people go. Oh, Tiffany and Jared are really all about entrepreneurs, and we've been talking about this for a while. And

200

00:55:41.090 --> 00:55:52.640

Stephanie Bogan: yeah, we want it to be less complicated. We don't want to mess up and make bad decisions like we want our money to work as hard for us as we. We've worked. Just so that like resonates with us, so that when we're ready

201

00:55:52.710 --> 00:56:08.309

Stephanie Bogan: to take action the likelihood is overwhelming. The path of least resistance is them. That's what you're doing with consistency, as you're making sure that your message and your phone call or email is actually the path of least resistance.



202

00:56:08.390 --> 00:56:12.299

Stephanie Bogan: So I'm going to stop here and get rid of the screen.

203

00:56:13.810 --> 00:56:35.009

Stephanie Bogan: So Tiffany, we're talking before the call, and we thought, rather than just drilling into this even more deeply, because I think that really sets the tone for right where we want you to take this and act on it. We thought we might go around and just ask each of you. What is? Do you have a primary strategy? What is it? And then do you have any questions about how to leverage that strategy more fully

204

00:56:35.700 --> 00:56:52.069

Stephanie Bogan: so Neil, do you want to start? Are you good, or do you want to start with Jen? No, run away. Yeah. Do you want to share with the group. What's your primary strategy? And if you think about kind of what we talked about, where do you think there's opportunities for leverage? What questions do you have? Or how can we support you?

205

00:56:52.300 --> 00:57:21.249

Neal Albritton, ChFC®: when I go out to Denver, I'm really gonna be paying attention to our current strategy right now is cois with an ancillary strategy of client referrals. so far this year we're 50 50 split between those 2. So there are. We don't get clients through any other means or any other marketing channels. So I wanted to pick Tiffany's brain a little bit more in Denver in regards to how they've continued to evolve their coi strategies.

206

00:57:21.330 --> 00:57:45.730

Neal Albritton, ChFC®: and see what we can do better in next year. So right now, my focus is making sure that, Eric, our new associate wealth adviser, can basically take over a lot of my roles in servicing clients. And then I hopefully, by next year, Tuesday, Wednesday, and Thursday 80 plus of those days are going to be a business development with cois or going after opportunities.

207

00:57:46.250 --> 00:57:48.109

Neal Albritton, ChFC®: That's the goal.

208

00:57:49.140 --> 00:57:51.820

Stephanie Bogan: What questions or challenges do you think you'll face?

209



00:57:52.760 --> 00:58:19.439

Neal Albritton, ChFC®: I think the challenge or the question I have most is, I'm good at the one on ones with cois and keeping those relationships up to date and getting the introductions. But I want to make sure there's an actual process behind the scenes and trying to make it as bionic as possible, so that I just have to show up and actually do the work. And I don't have to worry about the team or someone else behind the scenes, is making sure that the next appointment is taken care of, and I don't have to keep going into the nitty gritty.

210

00:58:20.210 --> 00:58:25.279

Stephanie Bogan: Right? So what are your next steps on this, aside from great. Just go to growth, retreat

211

00:58:25.650 --> 00:58:39.220

Neal Albritton, ChFC®: good growth, retreat. And then also what I'm doing prior to growth retreat is, I'm actually writing down everything that I do from a Coi perspective. because we don't have coi processes. so

212

00:58:39.480 --> 00:58:40.680

Neal Albritton, ChFC®: it's all of mine

213

00:58:40.690 --> 00:58:46.899

Neal Albritton, ChFC®: head right now. So yeah, let's create the processes so that we can replicate it with the team. So I don't have to do it.

214

00:58:47.860 --> 00:58:48.740

Stephanie Bogan: That's great.

215

00:58:50.940 --> 00:58:59.170

Stephanie Bogan: Jen, how about you. What's your primary Legion Channel? Is that staying the same? Do you see that shifting? Can you be stacking more where your opportunities?

216

00:59:00.720 --> 00:59:07.239

Jennifer Patterson: we also? We? Well, we're a small community. So

217

00:59:07.460 --> 00:59:15.820

Jennifer Patterson: the digital marketing that I did do a long time ago is still paying dividends, which is



good. So what's working is digital.

218

00:59:15.860 --> 00:59:29.850

Jennifer Patterson: We've been underground for like 4 years, though. So I'm rebuilding. So that so I think our biggest issue is our cois need to be re-educated and our cois need to be re-educated on the type of client we want.

219

00:59:30.320 --> 00:59:32.330

Jennifer Patterson: That's that's the biggest issue.

220

00:59:32.520 --> 01:00:00.719

Jennifer Patterson: So in terms of what I'm actually doing is, I've been thinking more about who is the ideal client. So because we know that we can service a wide variety of people. We're kind of the only game in town. There's a lot of pressure around that. So now, I've been working on this quote funnel, which is a digital funnel which we will then rule, we'll use that same funnel to educate the cois, but it's going to be very much a tax driven strategy.

221

01:00:01.110 --> 01:00:09.919

Jennifer Patterson: And so so really, what I'm doing is just honing and just saying we're just going to go after only targeting the executives. No business owners.

222

01:00:09.940 --> 01:00:17.280

Jennifer Patterson: no divorces, just executives for the moment in Bermuda and those coming into formula in the tech. And

223

01:00:17.410 --> 01:00:19.040

Jennifer Patterson: it's for free insurance based.

224

01:00:19.930 --> 01:00:30.259

Stephanie Bogan: And then where do you see yourself focusing as you go for it? Is it just doubling down on those strategies? Yeah, it's just doubling down, because there's just so much opportunity. So

225

01:00:30.880 --> 01:00:36.969

Jennifer Patterson: I mean, I can. If I were just a tax prefer. I could just go and blow up the whole island.



226

01:00:37.070 --> 01:00:56.340

Jennifer Patterson: but we're not, and that's the challenge is is not is getting away from the compliance work because we uncover the compliance work the when I mean by we go and talk to a prospect, and they've been preparing their own tax return. And there's a whole lot of complexity just in foreign retirement plans. Everybody's doing it wrong.

227

01:00:56.750 --> 01:01:00.610

Jennifer Patterson: First thing we do is we identify that it's been improperly

228

01:01:00.630 --> 01:01:26.640

Jennifer Patterson: reported, not reported or best yet. They're moving into retirement all of a sudden. I have to tell them that the entire amount that's going to be distributed to them so that they can roll is actually going to be ordinary income on their tax return. And they're sitting on 800,000. That's gonna come in. So most people should turn lots of shades of white. And so I'm trying to develop the marketing strategy so we can get way ahead of everybody before we have to be the bad person, and that's a whole

229

01:01:26.940 --> 01:01:28.010

Jennifer Patterson: wine.

230

01:01:28.160 --> 01:01:34.800

Jennifer Patterson: if that makes sense. So like we're going to just go doubling down on a couple of technical issues and then

231

01:01:35.010 --> 01:02:03.079

Jennifer Patterson: roll it out. Roll it out carefully so that we're not freaking everybody out. I think, Jen, Jen, you bring up a really good point that Tiffany alluded to earlier, and I really want to highlight it for everyone which is, Jen mentioned that they're just focusing on a couple of technical issues right now. So your growth strategy is one thing, right, the structure. But what you're doing in any given time is your actual marketing plan. For now how many times is Coca-cola changed their message and their commercials?

232

01:02:03.080 --> 01:02:19.599

Stephanie Bogan: How many times is Nike done it right? So the core just do. It doesn't change for the strategy of media or right event. Sponsor doesn't change, but the marketing messages that rate, the the the, the, the the package they're taking in the marketplace does evolve over time



233

01:02:19.600 --> 01:02:33.270

Stephanie Bogan: based on what's going on in the landscape and to specific strategies. Right? So Jen's on an island right? So she can speak to anything. It can be a lot. But if she picks 2 pain points that she knows a really relevant

234

01:02:33.470 --> 01:02:56.970

Stephanie Bogan: to her target client, she can build all of her content and every channel around that, and go so much deeper and get so much more specialized. And now it's so much more scalable because she's not trying to speak to 29 pain points. So that's the thing. I think it's hard when we have all this knowledge and this value to add. And we put these campaigns together, we forget to get really honed

235

01:02:56.970 --> 01:03:17.860

Stephanie Bogan: and focus on each campaign is making an offer, each blog is making an offer. Each podcast is making an offer. And that offer isn't necessarily everything. so I love that you're focusing on a couple of technical issues. And then it's really about, how do we share the content around those issues across the parts of the marketing channel?

236

01:03:17.860 --> 01:03:46.140

Jennifer Patterson: Exactly. And then we'll having solve that first problem. They have a second problem which we'll solve in the in the next piece of the the well, we know how we solve one problem. We showed them the other 9. Exactly because I don't want to start talking to them about comprehensive financial planning with taxpayer and investment management all in one go. We have to move them. That's what we're selling them. Ultimately I get to start them with, hey? Did you know that this is even coming? And then they you're like, Oh, my gosh! They're not mentally prepared to even talk about financial planning

237

01:03:46.140 --> 01:03:51.269

Jennifer Patterson: until we get through that first problem. So we're ascending them in the funnel.

238

01:03:51.430 --> 01:04:01.179

Stephanie Bogan: It's a fair point. Tiffany and I have talked about this around messaging on the entrepreneurial, and even the retirees side is sometimes you have to speak to the immediate pain point.

239

01:04:01.210 --> 01:04:13.459

Stephanie Bogan: Retirees aren't often sitting around going prosperous retirement where I'm free. They're like, Oh, my God! For the checks! How much are the checks going to be? And is it going to be



okay? And it takes them. This is my experience. Yours might be different.

240

01:04:13.580 --> 01:04:31.830

Stephanie Bogan: I swear it took like 18 months to 2 years, with clients in retirement, or a shift to divorce and exit before they were really like into their new normal, and in retirees in particular. I when I was coaching advisors at United right? We're having all these client meetings. I'd be like

241

01:04:31.830 --> 01:04:49.129

Stephanie Bogan: they're in their first 18 months. Man, we're just seeding the idea that it's okay. So that in 18 to 24 months we could be like, what do you want to do now that you know they would rush in and be like, Hey, you're retired. What do you want to do with your life? And people were like, I I don't know. I just want to know that the checks gonna show up

242

01:04:49.160 --> 01:05:14.489

Stephanie Bogan: reliably as I figure out what I'm gonna do with my life because it's a massive change for me. So the the point there is just right. Sometimes we have to bring them in the the hook or the offer. That's where the marketing comes in right. If you know that there's been a tax law change in Bermuda, your next podcast video blog coi meeting client email doesn't matter. The format

243

01:05:14.490 --> 01:05:23.299

Stephanie Bogan: is going to be on this topic, and it's relevance to people right? And then you can stack that, have it in the library, pull it out anytime that you need it.

244

01:05:24.050 --> 01:05:48.870

Jennifer Patterson: alright. So it sounds like you've got a good plan there. I like that. You're focusing on the technical issues. Are you doing anything with webinars yet. I know we had talked about that. Yeah, that's gonna be part of the. So we'll deal with the initial thing. And that's gonna come learn it. Basically, the webinars come, learn about this in a deeper level and then that's also basically a seminar. If we want to do it, live. So it'll be the same. I'm just trying to run it more digital instead of running the the In person, because

245

01:05:49.900 --> 01:06:10.209

Jennifer Patterson: it's harder to get away from. I want to run. I want to run them through the process. I did. And when I'm in process they can grab me so Ultimately it's to get them to the prospect process, but I have to educate them, and also to your point about the retirement. One thing that I have learned.

246

01:06:10.290 --> 01:06:20.689



Jennifer Patterson: at least in our market, like the the executives in particular, and some of the business owners, I find, like a lot of times, their their identity is so caught up in

247

01:06:21.040 --> 01:06:22.260

Jennifer Patterson: their career.

248

01:06:22.410 --> 01:06:48.210

Jennifer Patterson: And so there is. There's a lot of conversation that has to happen with retirement, and they're they're not. Anyway. The point is, if you you can get them in the door on something else as opposed to retirement. But you know that you really I me talking about that technical tax issue is really a pre-retirement. Get them in the door to start focusing on what retirement looks like long term, you know. Do they even have enough money?

249

01:06:48.540 --> 01:07:11.250

Jennifer Patterson: But I can't start talking to them about that right now. What I know is I can get them on the did you know that you're gonna have a tax hell problem. because then it's gonna cost you like, maybe whatever to marginal rate you're in, you know, 35% like, in other words, you're 800,000 worth 400,000. You want to do something about that and their strategy. We can reduce it. So it gets their attention.

250

01:07:11.390 --> 01:07:22.310

Jennifer Patterson: and then they feel like they got that win. And then they're like, Oh, what's next? And but then the thing is you get to identify because we're all you know. Good at what we do. You already know there's 400 million other things to do.

251

01:07:22.370 --> 01:07:34.879

Stephanie Bogan: You just started saying, by the way, we can also fix this. What Jen is doing that's effective is using a couple right. She is a function of her messaging strategy. And right. Think about this now. The sales, process her book

252

01:07:35.180 --> 01:07:43.119

Stephanie Bogan: right, her right, her from a leak. Conversion standpoint is going to be right. We're solving these issues and through the sales process.

253

01:07:43.600 --> 01:08:00.649

Stephanie Bogan: We'll right, we'll create other opportunities to go deeper. We're not trying to solve for every single thing every single time. The reason I ask about the Webinars one is, they really are the most



under utilized strategy in the wealth management space. My friend Samantha Russell talks about them all the time. We've built

254

01:08:00.650 --> 01:08:23.540

Stephanie Bogan: limitless on webinars literally literally built, all of limitless on webinars to the tens of millions of dollars over 5 years, because it's a really effective way when you have some brand reach, which is where again, right? You've got to have that distribution. But once you have the ability to get people to a webinar, you're basically aggregating very warm interest, right? As opposed to doing that one on one

255

01:08:23.590 --> 01:08:41.090

Stephanie Bogan: and when you have specific issues and topics to really tailor them to, they can be effective. So Tiffany and Isaac are going to be talking. they're going to be doing a power share at retreat is one of the the leaders topics to dive into webinars. How they use that strategy which I think will be really interesting. Most of you are either doing them.

256

01:08:41.149 --> 01:08:52.500

Tiffany Charles: A couple of you are doing them. Many of you are very interested in doing them, and or want or doing them for client education, and the strategy is exactly the same. So we'll be talking about that. So I think that'll be helpful to you.

257

01:08:53.430 --> 01:08:54.229

Jennifer Patterson: Thanks.

258

01:08:54.330 --> 01:09:02.099

Stephanie Bogan: Lyle. How about you? Where are you focused like? What's your current channel strategy. And where are you taking away from this conversation?

259

01:09:02.149 --> 01:09:12.079

Lyle Rosman: so we have always been referral, focused? and that's been reasonably successful. We've built a hundred plus 1 million dollar

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01:09:12.080 --> 01:09:33.889

Lyle Rosman: practice over 20 years by doing exclusively referrals. I never felt like we were getting as many as we should. I I felt even more so that way when we join limitless But really, weird Shism, it happens when you get into this tribe. So clarity is a really interesting thing.



261

01:09:34.689 --> 01:09:58.870

Lyle Rosman: I I never thought about any type of external marketing, digital or otherwise. That was just not a thing that we ever considered. came from the wirehouse world weren't allowed to have a website. We were allowed to have a web page, but it could only say, like your bio, and like 3 other things on it. And that was it. You couldn't tell anybody what you were good at, because that was in somebody legal. So this whole concept was alien to us, and then

262

01:10:00.130 --> 01:10:03.159

Lyle Rosman: on the piggybacking, on the idea of clarity.

263

01:10:03.530 --> 01:10:14.640

Lyle Rosman: kind of understanding what you want to do, and then who you want to work with we it. It took us a minute to get to sort of our niche and really define what our ideal client avatar

264

01:10:14.720 --> 01:10:31.449

Lyle Rosman: is or was, which is interesting, because my grandparents in 1,983 were the greatest example of these people. to know Long island this to know it's super expensive to live here in retirement. Generally your real estate taxes start somewhere in the 5 figures.

265

01:10:31.460 --> 01:10:45.999

Lyle Rosman: and so most people retire off of Long Island. So when we decided we wanted to go with a retirement planning retirement income, planning niche, but then really low, lean into the idea of moving off, of relocating off of Long Island.

266

01:10:46.380 --> 01:11:04.109

Lyle Rosman: It took us a minute to get there, and because I'd never had sort of that clarity piece of well, who we wanted to work with. We never created any. We never created any content around what we were doing because we were generalist. So we were just kind of throw a bunch of spaghetti at the wall and see what stopped

267

01:11:04.700 --> 01:11:06.659

Lyle Rosman: the other thing that happens

268

01:11:07.120 --> 01:11:21.810

Lyle Rosman: when you're indoctrinated into this cult, for long enough is things start to show up. So in my July check in with Staff, I'm telling her about this whole relocating thing, and she goes, you know,



like, so one of the things you might want to think about is.

269

01:11:21.890 --> 01:11:34.880

Lyle Rosman: you know, when you're talking about like blogs or podcasts or something like that, maybe like realtors in North Carolina or Florida. Maybe you interview one of them, you know, for like a podcast episode. And I'm like, how does she do that

270

01:11:34.880 --> 01:11:59.009

Lyle Rosman: like? How did she make that connection to draw that line? So about 2 and a half weeks ago, on that breakfast with a client of mine. She works for regional planning entity, municipal regional planning entity, and in Atlanta, and they do a bunch of stuff planning for bridges and roads, and and, you know, infrastructure related to health, care and education. And while we're sitting at breakfast she says to me,

271

01:12:00.840 --> 01:12:20.299

Lyle Rosman: you know, we became a huge climate. We became a huge refuge after Katrina, for, like people in New Orleans, like the huge influx of people into the Atlanta area, and we did a lot of work around that, she said. You know. Now you're talking about this whole relocating off of Long Island in retirement thing, and you're going to help clients with that and create some content around it.

272

01:12:20.310 --> 01:12:41.819

Lyle Rosman: one of the things you should really talk about is how climate change is going to impact that like? Do they really want to relocate to Scottsdale, and then have, you know, 60 days a year where it's 115 degrees? We just did this amazing. There was this national study done. We pulled some, you know, content from it. for a presentation that we're doing. Put me in, you know in in front of that. And I'm like, Wow, this is like, in a really interesting bl out thing

273

01:12:41.860 --> 01:12:59.300

Lyle Rosman: like, does it make sense to go to Texas or Florida, where it's always made sense to go to like my grandparents. 1,983, like you went to the east coast of Florida. If you're a Jew on Long Island in the eighties, you'd be located off of Long Island to Fort Lauderdale, Boyden, Boca. That's about West Palm. That's about it.

274

01:12:59.640 --> 01:13:21.289

Lyle Rosman: So I was like, this is really interesting, but I would have never made that connection if I had not been steeped in like Steph's little voodoo trick of. Oh, you look for content possibilities in the weirdest of places, and you'll find them. And that's what's going to work, because that's what no one else is doing so just to kind of put a period at the end of this sense.



275

01:13:22.470 --> 01:13:31.059

Lyle Rosman: Anybody who knows what I've gone through this year so far knows that if I put a plan in place and then subsequently back it up with some type of streak

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01:13:31.320 --> 01:13:36.190

Lyle Rosman: streaks, don't die in my world. And so

277

01:13:36.280 --> 01:13:57.649

Lyle Rosman: what we're gonna look to do is I have no preference. I I think, like I hate writing, but Chat Gpt makes things used to hate not so bad anymore. So we want to kind of commit to doing blog posts on a regular basis. And then I don't know if it'll be video or just audio, podcasts, but certainly

278

01:13:57.650 --> 01:14:18.320

Lyle Rosman: podcast with some regularity. I don't know if we're gonna do like blog posts every 2 weeks or or or twice a month, and then try to do like the podcast once a month. But whatever it is, starting like October first, where that's gonna be in place of whatever that regular cadence for delivering that content is going to be. We have a pretty decent

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01:14:18.320 --> 01:14:28.140

Lyle Rosman: file already of content ideas. And that's going to be the big sort of the big push. And then how to position that and where to go with that

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01:14:28.140 --> 01:14:42.270

Lyle Rosman: is something that we've been chatting with. Greg will now about. I'm going to loop back with him at Retreat. we are going to engage him for that. Him and his team for that. on a a

281

01:14:42.270 --> 01:15:04.519

Lyle Rosman: you know, one on one ongoing basis starting, probably in January. And that's going to be our, our, our big growth push going forward, is he? He? He saw what we were doing from a niche perspective and said, local SEO is where you have to go like. That's what makes sense for you. He also did a quick web search, and it's like, by the way, there's nobody on loan out who is doing anything

282

01:15:04.560 --> 01:15:13.249

Lyle Rosman: local SEO related at all, let alone in your niche. So you gotta you gotta do that And so they



yeah, that's that's where we're at.

283

01:15:13.630 --> 01:15:27.090

Stephanie Bogan: Yeah. So a couple of things that I heard there one I love you. And I've talked about the summer times. But this, like relocating in retirement or retirement relocation plan, right? Like, there's just a lot of marketing

284

01:15:27.200 --> 01:15:54.749

Stephanie Bogan: punch that you can really play with around that the other thing that you heard L. I'll talk about was right. We'll start with blogs. That's the low right written is for some people. It's easier a lot of for a lot of us. Talking is easy, but for some people right, the whole being seen on video part is a little bit harder leap. There are some very cool things that you can do if you're not ready to jump all the way in that give you like a lot of the same benefit. If you look on social

285

01:15:54.750 --> 01:16:22.350

Stephanie Bogan: you'll see some really cool ads that have like a picture of someone, and then like a watermark over it, and then they'll be doing some audio from a podcast, or just pre recorded. And then it'll have the copy up and it'll be like highlighting the boxes as they talk so it creates like an image of them that really hits with your brain like, Hey, it's still personal, but it's a soft way. You get the same kind of connection, because they're listening to your voice, and they're getting that little snippet. But it's a little bit softer entry.

286

01:16:22.360 --> 01:16:41.909

Stephanie Bogan: Who is firefighter of no takeer, Phil, who? My, who's in this room? Someone keeps coming in. I don't know, but I just injected them so, but they just admitted it again. I'm sorry I feel sorry. Let me know who you are, if you need to be here.

287

01:16:41.990 --> 01:16:56.680

Stephanie Bogan: so there! That's where those opportunities really kick in to leverage the content that you have without having to go into wildly uncomfortable territory. What's really important here is building a model.

288

01:16:56.940 --> 01:17:04.530

Stephanie Bogan: Right? So if you think about your content map. If right, you're mapping out your calendar for the year by channel.

289

01:17:04.770 --> 01:17:21.039



Stephanie Bogan: then it would be all right. My theme, you know, for this week, this month, whatever it may be, is right. Pick Jens, you know, one of Jen's pain points, and if my primary channel is a blog right then that's where I'll drop the core content. And then I'm gonna look all the way around that wheel.

290

01:17:21.920 --> 01:17:40.319

Stephanie Bogan: and then I'm going to decide where else I'm going to stack that content. So step one. The model is you want a good strategy which we've talked a lot about, too. You need, then, a structure. How do you make sure that you're doing something that you will consistently do? Because that is absolutely the secret sauce. Right? You get to show up consistently, incredibly.

291

01:17:40.440 --> 01:18:02.579

Stephanie Bogan: Once you've got that, what support do you have in place as we talked about earlier? Do you have someone helping you come up with topics? Do you have the time block. Do you have a podcast editor or a Youtube editor and a writing editor to help you get things over the hum wherever you meet that resistance is, whereas Tiffany loves to say you've got to build a system that's bigger than the resistance that you're gonna face.

292

01:18:02.590 --> 01:18:23.939

Stephanie Bogan: And then you're in a place where you can stack that content. Which is what we're talking about. Now, if I'm doing a video, does that, do I send that off to someone to turn into a blog just made a great point in chat. Right? Whatever J. Jared does, I don't know what it was podcast or something. She'll send that off to someone on Fiverr for 25 bucks, and they'll turn it into a legion

293

01:18:23.940 --> 01:18:33.320

Stephanie Bogan: that it then goes on social. We all do pieces and parts of that. What's really important and what really drives efficacy and efficient growth

294

01:18:33.320 --> 01:18:53.770

Stephanie Bogan: is building a model for that. Hey? My core legion is a blog. Every blog post is going to be 5 social posts. Right? It's gonna go in the idea. Ben, for speaking whatever. Right? I'm gonna branch that off into 5 podcast top. So I think 5 come in that thing like you can literally turn one piece of content into 2030, or 40

295

01:18:53.770 --> 01:19:06.860

Stephanie Bogan: touch points efficiently. If you're not sitting around making it up every time. If you're like, yeah, I need for social media post. Here's my fiber contractor. Send it out. Here's my writing person right? Turn this podcast. Into us.



296

01:19:06.940 --> 01:19:35.419

Stephanie Bogan: you know. And and these days you don't even have to do that. You can literally get your fathom, or your zoom notes, drop it into chat, if it's not too long, and be like some, raise this and give me right 10, you know. Give me 5, 250 blog posts. I mean, it will literally do a lot of that supporting for you. And that's where you ultimately get to the scale piece, and that's where the value is right. You put out content, irrespective of the format, and you're building up that distribution so that you know, at any given time. You set percentage of those people.

297

01:19:35.420 --> 01:19:54.500

Stephanie Bogan: we're going to have a need that requires them to reach out to you. And the more we build that distribution right, the more that that pipeline grows, and we start to put our effort in, concentrate our effort into that pipeline. And then those spin offs become wildly efficient. But what ultimately happens? Tiff and Jarrett have done this? Adam has done this.

298

01:19:54.500 --> 01:20:06.110

Stephanie Bogan: Those secondary pipelines becomes really meaningful streams of their own right. Adam goes out and speaks and he gets business. He gets business from people who are not listening to his podcast but it's a secondary stream.

299

01:20:06.260 --> 01:20:37.660

Stephanie Bogan: He's passing that podcast card out to everybody but the people who really liked what he had to say, who are ready to call him right now or in the next few months we'll do that. And the more that he speaks, by the way, than his name is on the circuit. Right is Jared's doing things. He's writing the book he's talking. Then you become more truly right, a more established expert in that space, because now people are having this is where it gets really powerful, a multi channel experience. You will see me on podcast you will see Stephanie in

300

01:20:37.660 --> 01:20:41.310

Stephanie Bogan: in every single format, there is the only ones we're not doing

301

01:20:41.310 --> 01:21:02.729

Stephanie Bogan: internally right now, our video and podcast because we're focusing on other things that we want to get really nailed down before we make those commitments. And when we do, we're gonna have a lot more opportunity on their side. But we haven't been in a position to capitalize on that opportunity, or it's just no point in starting a podcast and then stopping it after 3 months. And there are days. It makes me crazy where i'm, like

302



01:21:02.750 --> 01:21:16.860

Stephanie Bogan: okay, all these people have. Podcast it's been done already. What am I gonna have to say? And then I'm like, this is the stupid thing, right? That's just the very human part of our experience. Right? We have a voice. We have something to say. We know we'll build up an audience list.

303

01:21:16.930 --> 01:21:29.849

Stephanie Bogan: but we're being very intentional about how we execute, so that when we show up we can do it not just credibly, but really, really, consistently. So you're not gonna be in all 10 channels at level 10 all the time.

304

01:21:29.890 --> 01:21:34.759

Stephanie Bogan: As you grow and you create leverage, you get that traction.

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01:21:34.860 --> 01:21:56.280

Stephanie Bogan: hey, Ryan? I can write articles really quickly now. No big deal. Right? Hey? I can do 5 more podcasts, no big like. Then you can really start to scale it and use people, process and platform. And that's where you can be. And Youtube video put like, that's where it starts because you build a machine around it. And now it's not all this personal effort that you're pushing. It's how you're executing using that structure.

306

01:21:57.290 --> 01:22:01.829

Stephanie Bogan: Dave, how about you? What's your current channels? And where do you think you want to focus going forward.

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01:22:03.820 --> 01:22:14.659

David Burgio: Yeah, you know, we we've had a lot of success with doing educational events like we've done like the educational workshops and colleges, and that that actually pretty much

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01:22:14.700 --> 01:22:39.550

David Burgio: changed the projectile of the practice. We we ended up getting some really great clients, and then great referrals from them. So, though those are really incredible, we just did one you know, to your point about the webinars. We we tested one in April with white white white glove and you know, I just wanted to really see if it would work. But we did a a recorded webinar that was

309

01:22:39.850 --> 01:23:01.929

David Burgio: you know, broadcast twice as if it was live, which was really, you know, I didn't think whatever work, you know, but I just did it just to see if it would work. And in, sure enough, we picked up



an ideal client from just just doing the one of them. So we've had a lot of good experience like doing like video, seminars educational type of events.

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01:23:01.930 --> 01:23:16.899

David Burgio: so the the focus for me is really, you know, focusing on really educational webinars for my current clients. And and I, really, you know, want to do just is how you just left this last conversation. I really want to do

311

01:23:16.900 --> 01:23:37.399

David Burgio: kind of go through it much more, and and just learn how to cut it up and and redistribute it out. One quick thing I just want to mention to Lyle that you may have thought of already, or may not have. But we, what we've been doing in included in this educational Webinar stuff is we brought in a subject matter. I'm in Buffalo, New York. So

312

01:23:37.420 --> 01:24:02.420

David Burgio: if you think people want to leave Long Island. You should see here, Buffalo, you know it's it's even even more so, for my. My. My only question is, has it snowed yet in buffalo when you say that I have to look up the window. But but but you know, when one thing we did, and you may want to incorporate this because I love the idea of this retirement and location plan. But we we brought in a real great subject matter, expert attorney, that

313

01:24:02.420 --> 01:24:25.039

David Burgio: it represents our clients locally in our area. how to survive Residency State audits when they when they buy a place in Florida, and they want to spend time here, and it drives a significant amount of attention so that could really be in your your retirement relocation plan. How to survive New York State Residency at. It's It's been amazing, really well received. We're going to do another one in September.

314

01:24:25.070 --> 01:24:31.149

David Burgio: But yeah, you know, it's definitely my my question. But really be like, you know. we have capacity

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01:24:31.410 --> 01:24:55.119

David Burgio: to to start doing this and and breaking it up and and so forth. But we don't really have the expertise for that. Do you think we should hire, you know, like a like a third party group to do that? Or do you think that? Are we going to be experts? Come, A August 20, fifth will be 100, you know. We'll be experts in. I I don't know. Like, what what do you think on that? Because that'd be a good project for David to do? I'd like David to



316

01:24:55.340 --> 01:25:06.940

David Burgio: to learn how to to fish like that, and and kind of learn the ropes and and be like a you know, like a taylor show. You know how he I know he controls it and does it all himself, you know.

317

01:25:07.250 --> 01:25:10.430

Stephanie Bogan: Yeah, Tip, I saw you nodding, do you? Wanna do you want to kick off with that?

318

01:25:10.890 --> 01:25:24.709

Tiffany Charles: I mean, we certainly can the webinars sessions that we'll be doing at gross retreat will be really great. By the way. But when you say you taking it on as an expert. And or

319

01:25:24.870 --> 01:25:36.269

Tiffany Charles: are you talking about the relocation? The one that you previously did? And now you're looking to be? No, you know it. Just I. I'm so yeah, no, but I I'm sorry it wasn't clear what I meant was,

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01:25:36.320 --> 01:25:40.019

David Burgio: like when we're doing these webinars like, how

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01:25:40.020 --> 01:26:07.860

David Burgio: kind of cut it up, you know. Cut those pieces up. And you know, maybe put some on podcasts, but some on like social media, like you know. Put some on, you know, as webinars, you know. How do? How do we leverage that? I? I know that it's possible. And you know, how do we create some writings and blogs, and so forth, but in terms of like the expertise to really do that like that, we have the capacity to set the the expertise to actually to to leverage those pieces out, you know. It'd be neat, you know, down

322

01:26:08.380 --> 01:26:30.600

Tiffany Charles: to, you know, do one part of it, and then leverage it out. I think it'd be really cool.

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01:26:30.820 --> 01:26:48.189

Tiffany Charles: The webinars I'm like, if you are recording them as stuff does, or having your firefly in there, or something along those lines right easy to throw that into a chat and then create some social posts, some reels, and or create a



324

01:26:48.190 --> 01:27:12.770

Tiffany Charles: again. Send it to Fiverr and create like a guidebook. That's a really great follow up for your next webinar. That's like, hey? If you stayed at the end. We have a free giveaway, right? And or as a follow up send this out. If you found out, you know, if you really loved our webinar, like we have a guide feel free to send it to others, and they have to give you information in order to, you know. Get that lead. So those Ctas are really great.

325

01:27:12.770 --> 01:27:38.640

Tiffany Charles: so I feel like there's aspects of like what you can do in house. And then what may make sense to leverage out of like third party expertise. and there's a lot of systems. So I think a Dave, we, a good conversation with with him, would be like, where is he at on that over time you may find that you're gonna want to eventually push that out. something that we like as a firm

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01:27:38.660 --> 01:27:39.830

Tiffany Charles: is we

327

01:27:40.750 --> 01:28:02.369

Tiffany Charles: have adopted or learned a lot about how we want a certain process so that we can effectively make sure that it's going out consistently, in a really great way, in a way that we like. And so there is something about building it in house and then being able to effectively delegate that to a third party. so. But if you're creating the content, and then you have the webinars.

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01:28:02.780 --> 01:28:04.329

Tiffany Charles: there's so many

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01:28:04.670 --> 01:28:07.870

Tiffany Charles: options that are not

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01:28:07.980 --> 01:28:19.249

Tiffany Charles: crazy expensive that you could get that out there, so I would explore it and just know your capital time and energy trade offs. And then, really, where is Dave best?

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01:28:19.530 --> 01:28:36.819

Tiffany Charles: Would it be putting them in the prospect process? Would it be? You know it? Would it be him engaging with those that are engaging with the content. Would it be personal? Follow ups to those that have provided you email addresses from the lead? Gen's so hopefully, there's a lot that kind



of comes from recycling that content

332

01:28:36.850 --> 01:28:41.059

Tiffany Charles: and then figuring out where he's where. Maybe it would be best use of time.

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01:28:41.110 --> 01:28:42.310

David Burgio: Gotcha.

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01:28:42.340 --> 01:29:11.479

Stephanie Bogan: yeah, I was just drawing, because I'm just gonna to turn that into a picture right? It. This is really tragically bad, as we're all used to. But we're building out like a model for this for next year, so we can take you guys through it. But right like you're gonna have your content. You' to have a piece of paper or a spreadsheet. Right? Pick your format so I'll use your example right? So, my content, driver, pipeline is my webinar, and in this case we're going to use the New York Residency audit. Right? Boom! That's my content. In the middle.

335

01:29:11.480 --> 01:29:36.349

Stephanie Bogan: I'm going to define in advance. This is where you get so efficient. You do the smart thinking once, okay for video, every time I do a piece of content, I'm gonna have 3 1 min videos. I'm gonna get a contractor who's good at that right? So whether it's chat and a right, and then you send it off, or a writer and you send it off doesn't matter in each of your channels. You're gonna that's where the support system comes.

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01:29:36.540 --> 01:29:48.489

Stephanie Bogan: Right. Adam, just does his podcast now with chat Gbt, he's been doing it for 3 years, but in the beginning he was like talking to people. And what ideas do you have? And he had to block time on his calendar and figure. Now he's got that home

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01:29:48.490 --> 01:30:09.650

Stephanie Bogan: right. So now he's in a position to take his. You know his success and expertise in one area and then apply it to the other. So you want to be careful that you don't overdo it in the beginning. You don't necessarily want to start with taking everything you do and putting it 19 places unless you're set right. So step one is, get that core content in that core channel. But as soon as you can

338

01:30:09.650 --> 01:30:22.720

Stephanie Bogan: via your support. You're then going to scale. If it's right that webinar is gonna turn into 4 750 word blogs. You take the webinar. You download the transcript you drop into Chat. Gbt, you say,



please create 4, 750 word Vlogs.

339

01:30:22.720 --> 01:30:39.779

Stephanie Bogan: You send it off to a writer like. However, you get there right. The amount of time that's actually required is nominal in this model. You go around, you know we're not doing this one. I don't have to worry about that, hey? I'm coming over here to see a wise right that Webinar is going to turn into, you know, 6 coi messages

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01:30:39.780 --> 01:31:02.610

Stephanie Bogan: right? And then that becomes, you know, you define that, is it? Email campaigns, is it white papers, etc.? Right? Clients are an audience, hey? It's gonna turn into a 3, 1 min videos for clients. Hey? We were talking this week about blah blah, blah, right? It shows up somewhere social, right? I'm gonna have my addy stuff where I'm promoting webinars. And I'm gonna have my personal stuff. And i' my little voice overs

341

01:31:02.610 --> 01:31:11.689

Stephanie Bogan: where they take audio from right. And it shows my picture because I'm not ready for video. And we've got the highlights, and that cost me a whopping \$150 on fiber.

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01:31:11.690 --> 01:31:25.459

Stephanie Bogan: So once you've got the model built out, you build out your support system. And then you just filled that basically habit machine of if your content is Youtube. You pass it off to the contractors. You've got that relationship established.

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01:31:25.460 --> 01:31:48.010

Stephanie Bogan: and they know what to give you back. So you can. Actually, we've done it, Tiffany, you've done it like you can build a really robust marketing machine without having a big marketing staff. As long as you've got that model to find otherwise you're constantly chasing. Oh, I got an invite for this, or what about this? Or what should I do? Notice what we're talking about is just getting so much more intentional about the work that we do.

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01:31:48.480 --> 01:31:58.339

Stephanie Bogan: So, Dave, that's the model like very much all that stuff, the tiff said. I just like to put it into a model, because I know that right? We just like to replicate what works, so that we don't have to reinvent the wheel.

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01:31:58.730 --> 01:32:00.169



Stephanie Bogan: Does that help a little bit?

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01:32:00.410 --> 01:32:07.240

David Burgio: How about you and Travis? I know you're displaced at the moment.

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01:32:07.280 --> 01:32:14.140

Stephanie Bogan: Nonetheless, where are you guys focusing your channel marketing? And where do you think you want to focus as you go forward?

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01:32:17.250 --> 01:32:27.179

Liana Poodiack: Hello! There! So right now, we've been continuing to do our short videos that, we post on our current website.

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01:32:27.500 --> 01:32:40.040

Liana Poodiack: So we actually use a company that helps us write the script because that is not something I'm I'm very good at. So we hire that out. we produce about 12 of them a year

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01:32:40.290 --> 01:32:52.889

Liana Poodiack: and use them mostly for existing. You know, we will email, some of them out to clients. try to push them to the website to see them or the Youtube Channel

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01:32:52.950 --> 01:33:00.949

Liana Poodiack: is what we're currently doing. So we have not switched our whole branding message. We're waiting for that to roll out once we're

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01:33:00.960 --> 01:33:02.349

Liana Poodiack: at our new firm.

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01:33:02.610 --> 01:33:03.480

Stephanie Bogan: Okay?

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01:33:05.030 --> 01:33:15.949

Stephanie Bogan: Where do you see any opportunities to stack that in terms of the other channels. Or do you feel like that's what you can manage and consistent? I mean, obviously, you've got a lot going



on, but changes. But

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01:33:16.300 --> 01:33:21.860

Stephanie Bogan: driving the growth that you want, do you need to deepen in or expand it as you reflect on growth?

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01:33:22.250 --> 01:33:27.570

Liana Poodiack: Yeah, no, it definitely needs to be deepened. And we need to kind of, you know.

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01:33:27.720 --> 01:33:34.340

Liana Poodiack: narrow the focus of it right now. It's very broad. We have also.

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01:33:34.360 --> 01:33:41.560

Liana Poodiack: done a few different little webinars. They're more live presentation type stuff. We have done that in the past.

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01:33:41.650 --> 01:33:52.599

Liana Poodiack: so I think those are. You know what everybody is talking about, and what we're all wanting to do is have more of a consistent presence out there.

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01:33:52.700 --> 01:33:59.610

Liana Poodiack: And that's just a a big time commitment that right now I don't think we are able to commit to.

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01:33:59.890 --> 01:34:03.099

Liana Poodiack: as far as having something that's more frequent.

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01:34:03.170 --> 01:34:21.929

Stephanie Bogan: something that I would love to see you do. Tiffany's done a really good job of this. Going to the conversation with Dave is setting up, as you guys are preparing for the change next year is setting that up so that when you are ready to drive that growth you're just leveraging the system right? So finding that upward contractor who can do the blogs, etc.,

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01:34:21.940 --> 01:34:41.890



Stephanie Bogan: because you've already got your core content. And it's working. And you're doing that consistently. So it's right. As we talked about. Are we driving deeper, which Tiffany's done right? You go into more topics and more subjects where you're building deeper and deeper credibility in that audience? Jen, right? Your technical issues or David's retirement. you know, relocation audits are a great example.

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01:34:41.890 --> 01:34:52.129

Stephanie Bogan: And right you can. So that's where we just have to get really clear about, which is why, as lean of that question, doing everything they're dealing with, it's really easy to disperse our energy too much.

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01:34:52.130 --> 01:35:06.320

Stephanie Bogan: And remember, it is like watering a garden right? You're trying to keep the landscape alive, but you've got one hose, and wherever you're pointing that water hose is where the water is going right now, which is our typical marketing style. What Tiffany and Jared

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01:35:06.330 --> 01:35:25.209

Stephanie Bogan: have really put in place, and I, many of you are working on really well over the years, is building a sprinkler system so that you don't have to be standing there, and where you pivot the water pivots and where you're focused, it grows and where you're not, it dries up. What we're really talking about with these channels is you can apply that individual effort, and it will work really well.

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01:35:25.290 --> 01:35:51.669

Stephanie Bogan: it gets really exciting. And we can start to really scale that growth when we get to a place where we can implement that broader strategy and stacking system. So we can take that one path of work and turn it into write. Fi, you know, multiples of additional opportunity, but it does take tiff to talk about that time, energy and effort to manage great people and teams and contractors and channels. So you want to make sure that you can do it

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01:35:51.670 --> 01:35:58.580

Stephanie Bogan: consistently. So it's better to do one thing really? Well, I think tiff. Would you agree then? Right? 10 things that you're doing at 10%.

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01:36:02.220 --> 01:36:03.940

Tiffany Charles: Absolutely.

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01:36:05.090 --> 01:36:07.179



Stephanie Bogan: Matt. Good to see you, man, how are you?

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01:36:11.030 --> 01:36:12.009

Stephanie Bogan: Can you hear me?

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01:36:12.890 --> 01:36:16.680

Matt Hoskins: Oh, sorry! There we go. I'm doing good

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01:36:16.810 --> 01:36:36.289

Stephanie Bogan: you could go back and listen to the beginning of the call if you want. We were just going over choosing your channel and growth strategies, which I think will be a really good conversation for you. You're gonna have depending on how things are going with the firm. Obviously a nice lead. Gen. But as we talked about in our last call. You've got a lot of other opportunities right to grow. And I think for you, it's going to be about focus, like everyone else.

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01:36:36.420 --> 01:36:38.109

Matt Hoskins: Yeah, I think so, too.

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01:36:38.690 --> 01:36:52.090

Stephanie Bogan: All right. Well, you, you and I can. Can you that go back? Watch the recording, if you can, before growth retreat? I think it will really helpful, and then we can have you, you and your husband. Your peers can have some sidecomers around that in terms of where you want to focus your efforts as you make a big pivot as well.

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01:36:52.090 --> 01:37:11.320

Stephanie Bogan: Alright, everyone super nice chatting with you, Tiffany. Thank you as always for joining us and your insight and experiences into how you've applied these lessons. I we really just wanted to ground you guys in the strategy of let's get really clear and conscious about where we're going to apply our time, energy, and capital in terms of our channels.

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01:37:11.340 --> 01:37:38.330

Stephanie Bogan: and those one or 2 can work incredibly well, and then no difference in service models and everything out. When you've really nailed it right? Your 2 year, 3 year 4, you can really expand and drive into those scale channels. But in the beginning, simple, it really is the ultimate sophistication. So I know we're very much looking forward to getting together with all of you at Growth Retreat. we'll see you there. We've got some great thing plan for lifestyle and some really fun stuff, I think some meaningful conversations for leaders. So we'll see you there. You guys have a great day.

