

# LIMITLESS Coaching Call Transcript

AUGUST 7<sup>TH</sup>, 2023  
CHOOSING YOUR CHANNEL  
LIFESYLTLE PRACTICE DEVELOPMENT CALL

16

00:02:15.230 --> 00:02:36.599

Stephanie Bogan: Today's conversation is really about choosing your channel, and it's funny I was sitting here reflecting on this this morning. You know. How do I want to approach this conversation? How do I want to open it up? And I realized, you know, when we think about how we show up in our business. The operative word here in this conversation is, choose.

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00:02:38.040 --> 00:03:02.060

Stephanie Bogan: when in the beginning we're really in this growth mode. Like we go, we try a bunch of stuff. We hope a bunch of it sticks right? We get to that rent and ramen phase. And then what tends to happen is that tends to be the behavior and the business practices that come with us where we're right, you know, flying by the seat of our pants, we got a lot of spending plates. We're doing that yo-yo marketing that we talk about a lot where we're

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00:03:02.060 --> 00:03:10.959

Stephanie Bogan: focusing a reference on something as we want to drive business. And then we get business and we get distracted. We got to support that business, and then we're like, Oh, wait! We want some more business.

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00:03:10.960 --> 00:03:13.130

We got to start another opportunity.

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00:03:13.510 --> 00:03:20.360

Stephanie Bogan: Today's conversation is about, how do we shift from that sort of reactive leaning in?

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00:03:20.710 --> 00:03:38.190

Stephanie Bogan: What's the word I'm looking for? Right without intention, mode? And how do we stop expending all this energy and effort, with mixed results and fits and starts. And how do we shift into a way that's more clear and conscious and committed in terms of how we execute on our marketing.

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00:03:38.370 --> 00:03:51.129

Stephanie Bogan: So success seems really complicated. A lot of the time, right? When you're trying to create a level of success. Adam can talk to you about this. You're like, Oh, it's hard and it's complicated. And it's then I I all it.

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00:03:51.180 --> 00:03:58.580

Stephanie Bogan: But if we're really honest with ourselves. it's really about getting brilliant at the basics.

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00:03:59.300 --> 00:04:19.690

Stephanie Bogan: Do we know what kind of practice we want to start? Do we know what clients we want to serve? Do we know what kind of value we can add and how to charge for it? And when we know those things, we're in a really advantageous position to sit with ourself and say, knowing who we are and what we want to do, and the value we can add, the clients we want to serve. Now we get to choose our channel



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00:04:19.870 --> 00:04:26.240

Stephanie Bogan: or channels. Which right are the lanes that we're going to market. We think of each lane as your growth engine.

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00:04:26.430 --> 00:04:40.719

Stephanie Bogan: We're gonna really dive into how we drive growth in this firm. Whether you're right. A solo advisor or you have a small staff, or you're building into an ensemble is irrelevant to this conversation. It's how you sit in the space

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00:04:40.790 --> 00:05:01.239

Stephanie Bogan: of making conscious choices about where you're gonna commit your time, energy, and capital when it comes to marketing so that you can get that hockey stick effect, which is, there's going to be some investment in the front end, as Adam can tell you. But on the other side of that investment, if you execute with discipline

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00:05:01.690 --> 00:05:19.069

Stephanie Bogan: is some really great growth trajectory. So that's really I want today, I want to frame today's conversation around. We're going to talk about channels and the what's in the house. But I want to frame this from a leadership and a mindset and a strategy perspective around. It's just about getting clear

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00:05:19.610 --> 00:05:36.310

Stephanie Bogan: about how you're gonna drive growth in your firm in a way that aligns with your style and your goal, so that when that growth comes, not only are you profitable, but you're also happy and satisfied in terms of the clients that you work with, and the time and freedom and the income that comes with it.

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00:05:36.640 --> 00:05:38.070

Stephanie Bogan: you guys ready for that?

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00:05:38.280 --> 00:05:54.989

Stephanie Bogan: Yes, Steph, we have a request your fathom recorder has showed up on your thanks, Julie, do you hold on, then I switch my screen today and I can't come here. We go. You just drag it off.

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00:05:55.360 --> 00:05:56.939

Stephanie Bogan: Then you love this. Thanks.

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00:05:57.820 --> 00:06:14.740

Stephanie Bogan: So I think this really leads into a conversation about what's your entree? What's going to be your core staple marketing in terms of how you really want to focus your energy to drive growth. And then, as Adam will talk about like there's sides, right? It doesn't mean there. You're never just doing one thing Adam has

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00:06:14.740 --> 00:06:31.309

Stephanie Bogan: podcast is a key driver of his business. But he's still doing speaking. That's a driver. He's still doing center of influence relationship. So, Adam, do you want to talk a little bit about just framing like what's going to be your core growth engine versus rate. Those other things that you do.

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00:06:34.500 --> 00:06:41.790

Adam Cmejla, CFP®: hey? It helps to unmute yourself before you start talking happy Monday, everybody

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00:06:42.010 --> 00:07:05.859



Adam Cmejla, CFP®: So I'd like to say that I was as clear on this as very as I as possible in the very beginning as it as it pertains to podcasting, like what I mean by that is that I knew that this was going to be the ability to cross, pollinate, and how many different doors it would open, etc., etc. I didn't. I just hit record. And we will. We'll talk about podcasting very, very specifically and do an in-depth dive on that at growth, retreat

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00:07:06.120 --> 00:07:09.560

Adam Cmejla, CFP®: to talk about or to

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00:07:09.610 --> 00:07:13.930

Adam Cmejla, CFP®: compound on what step was talking about there. I think the thing that I did

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00:07:14.130 --> 00:07:35.650

Adam Cmejla, CFP®: in 2,018, when I was thinking about, which channel I was going to choose is, ask myself, what am I really good at doing? And what do I enjoy doing what really doesn't feel like work, because I feel like so many different things that we do in this business, especially as we get to a point of success, or as we find different levels of that success.

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00:07:35.700 --> 00:07:41.029

Adam Cmejla, CFP®: At least, this is what I experience is that I started to have a little bit more

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00:07:41.130 --> 00:07:46.840

Adam Cmejla, CFP®: agency and flexibility to say, Do I really enjoy doing this? Or was the

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00:07:47.010 --> 00:08:13.460

Adam Cmejla, CFP®: need to do it? And the like it had to get done, essentially masking the discomfort and the friction that I had in doing certain tasks. Right. It was just this, I'm going to just put my head down. I'm going to plow through it because I have to get it done, and the effort of doing that masks the fact that a I really don't enjoy doing this and be I'm probably not the best at doing it, anyway. But once I actually got to the point of having a little bit of

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00:08:13.610 --> 00:08:17.880

Adam Cmejla, CFP®: space to breathe and evaluate what I was spending my time doing.

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00:08:18.190 --> 00:08:21.229

Adam Cmejla, CFP®: It gave me that freedom to kind of say.

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00:08:21.520 --> 00:08:35.039

Adam Cmejla, CFP®: all right. If I could choose my channel, and I could choose what platform and how I wanted to do this, what was going to be best. and it was at that time that I had any, and timing was everything. I should say everything, but it. It certainly played a role into that

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00:08:35.230 --> 00:08:50.299

Adam Cmejla, CFP®: right 2,018, 2,017 is when Kit is kicked off his podcast podcasting. I feel like, had kind of gotten to be at that initial. You know, it was one of the waves, podcasting is certainly, not done by any stretch, but

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00:08:50.340 --> 00:09:02.429

Adam Cmejla, CFP®: that just checked all the boxes of gosh, I'm good at talking to people. I'm good at asking questions. It's all we do as advisors, right? Good advisors ask really good questions. And you just spend your time asking questions.



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00:09:02.450 --> 00:09:09.799

Adam Cmejla, CFP®: I like being on stage. I like that aspect of communicating podcast and just check all those boxes. And then

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00:09:09.820 --> 00:09:30.260

Adam Cmejla, CFP®: what I what I was saying in the beginning that I can't say that I had the foresight to see, but it has worked out is all the different cross-pollination options that exist when you choose the channel that works well for you, and what I mean by that is, you don't have to do podcasting in order to open up speaking opportunities or

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00:09:30.820 --> 00:09:54.279

Adam Cmejla, CFP®: consulting opportunities, or whatever whatever goal that you might have by utilizing your channel like it's. There are other ways in which you can do that or there are other. If you choose other channels, you can still open up those other cross pollinations. I think that's kind of what we're going here with. What's your entree versus what goes well as the side? What's your hub, and then what are the spokes? Whichever channel you choose as your entree as your hub?

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00:09:55.020 --> 00:10:01.609

Adam Cmejla, CFP®: It's not if it's how many you choose to open up as side dish opportunities or spokes. Does that make sense?

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00:10:01.680 --> 00:10:17.809

Stephanie Bogan: Yeah, you're never gonna be in a situation where it's one thing, and one thing only because it will spiral into those other things, I think. What Ad Adam and I are trying to communicate is it's really about what's the main. You go to the buffet. Do you like Chinese? Do you like Italian? Do you like French?

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00:10:17.810 --> 00:10:33.079

Stephanie Bogan: And then, right I we were in, you know, you guys, when we took our 30 day vac. And it was like, I want a little of this, and I want a little of that. There are going to be those ancillary opportunities. But I want you to be really clear about where they fit into your gross strategy, because you can also be in a situation

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00:10:33.080 --> 00:10:40.990

Stephanie Bogan: like, we've all been at the buffet where you try to eat a little too much at a time. So today's conversation is, just how do we get really conscious about that.

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00:10:41.120 --> 00:11:00.819

Stephanie Bogan: What is your core channel for demonstrating your expertise, your credibility? Right? Your character, such that other humans will say, Jeff, Danny, Jan, man that you seem likeable and trustworthy. Incredible. I think I would like to work with you because I am in a place where I have a financial need.

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00:11:01.650 --> 00:11:05.699

Stephanie Bogan: So there's a lot of different ways that you can go about this one

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00:11:05.730 --> 00:11:15.770

Stephanie Bogan: right audio to Adam's point. Do you like to talk? We all know I love to talk. You put me on a stage. You put me on a podcast. You put me on a call. I will just go

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00:11:16.020 --> 00:11:36.610

Stephanie Bogan: go like there's no almost no limit to to right. But you tell me that I have to sit down and put it in an article or a paper or report, and it requires a lot more effort. When I say a lot more effort, I mean, like 90% more



effort. I can show up and talk with 0 effort. I have a lot of experience to share. Just pick a topic. We'll go.

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00:11:36.710 --> 00:11:54.959

Stephanie Bogan: But if I have to define and organize and present those thoughts relative to a specific outcome. Right? I've got to really spend time and energy there. It doesn't mean it's not good time and energy, but I need to recognize that when it comes to how I best leverage my time and talent.

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00:11:55.040 --> 00:12:12.489

Stephanie Bogan: And in the technology world that we're in, you can actually be a talker. And with AI and fathoms and marketing firms, and right upward contractors and right writers. There's no limit to your ability to just speak your voice

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00:12:12.580 --> 00:12:23.199

Stephanie Bogan: and then retain partners, team members, other people who can sit in the space of translating and packaging that into different formats and mediums that really work for you.

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00:12:23.950 --> 00:12:45.319

Stephanie Bogan: So if you love to talk. Those are all great options. What? What if you like to perform like some of you were great at talking? But you're not comfortable being on video. I was just having a conversation with one of you last week about how we go about that process like, Oh, I've done this. And now I've got to do these videos. And I really like how many of you love the idea of talking? I call it talking to the dot.

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00:12:45.710 --> 00:13:05.679

Stephanie Bogan: so I always joke like Pre covid. Right? I would speak to audiences of thousands. Do a webinar once in a while the day that Covid happened and everything shut down. It was like a thousand webinars, and literally 2 thirds of them were not where you could see the the attendees. Right? It's just a I'm literally talking to a red dot. I'm like, Wow.

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00:13:06.480 --> 00:13:19.560

Stephanie Bogan: that's a different experience. Like you have to provide all the energy and the enthusiasm and the connection, and the relatability and the trust and the confidence, and you have nothing to paying off on the other side.

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00:13:21.420 --> 00:13:33.060

Stephanie Bogan: And then I realize, like my actors have like there's like an actual skill that goes into just showing up, turning it on and delivering the message, assuming that there's that energy and reciprocity on the other side.

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00:13:33.340 --> 00:13:49.629

Stephanie Bogan: Some people really love that I got over that hump. And I was like, Wow, this is a really cool way to create so much more connectivity and engagement. But if you hate it to Adam's point, if you literally want to crawl into a ball and die, I'm not going to suggest that you start up

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00:13:49.760 --> 00:14:05.329

Stephanie Bogan: but making video your primary channel. so it's really about. There's interviews, monologue and dialogue, right? If you like to write, which is a one way process where you can demonstrate credibility and expertise.

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00:14:05.330 --> 00:14:21.580

Stephanie Bogan: Then there's blogs. There's white papers. You can really build that same voice and credibility in much more of a written format that really pulls people in into the personal as a part of your your sales process. The difference between audio and video and written



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00:14:21.690 --> 00:14:38.640

Stephanie Bogan: is that there's mo a little bit more relationship and audio video on the front end. But you can still develop a lot of relationship in that written format. And in any of those channels. We're really trying to convert it to relationship Alpha, based on trust equity that we built

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00:14:38.770 --> 00:14:48.980

Stephanie Bogan: irrespective of the channel that we choose. So we can use that trust equity as we go into the sales process. Patrick, I saw you on the line a second ago.

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00:14:49.860 --> 00:15:03.019

Stephanie Bogan: Video, the videos move. Are you still there, Mr. Kane? They do move because I did the same thing. I was right there. It's like an ago, and I'm like, where did you go now? He's in the bottom center, so

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00:15:06.870 --> 00:15:09.920

Stephanie Bogan: I can kind of hear. Say something again.

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00:15:12.590 --> 00:15:14.279

Stephanie Bogan: Oh, man, you're cat! Now

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00:15:14.700 --> 00:15:34.559

Stephanie Bogan: we're going to come back to Patrick in a minute? I asked him. He's gone through a lot of iterations and figuring out his channel from Cli's client referrals, and now he's been really successful with his Youtube channel. Patrick, do you want to talk a little bit about how you went through the process of figuring out the channel that was really gonna like, get traction with you.

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00:15:35.530 --> 00:15:46.870

Patrick King: Yeah, absolutely and hopefully, I've got my Internet connection is Spotty. So hopefully, you're hearing me now. But yeah, absolutely. So I had the camera stuff. I've always loved photography and video.

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00:15:46.970 --> 00:15:48.669

Patrick King: And it's hard.

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00:15:48.850 --> 00:16:04.680

Patrick King: And I thought that that was a huge differentiator, because the extra level of technical expertise made it a blue ocean strategy, so to speak, and said, Hey, I'm good at this. I enjoy it. I like it. Why not just give this a shot. And so I

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00:16:04.810 --> 00:16:19.449

Patrick King: like videos that nobody watched for a year. And then it finally took off. So there was a couple of commitment and grit that's required to do all of that. But yeah, it was. It was part And then part to to add this point earlier.

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00:16:20.130 --> 00:16:36.829

Stephanie Bogan: Yeah, I think the part of that that I really like. which we'll talk about a little bit later is you have to whatever channel you choose. You're gonna choose that channel and execute on it, in spite of the fact that for the first year or so it's gonna feel like nobody's listening like literally like you're talking into a blank void

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00:16:36.830 --> 00:16:57.790

Stephanie Bogan: which makes it really hard to continue talking. So it's really about choosing your interview style or your monologue style, right to like podcast you like webinars and seminars and Youtube, are you much more about content creation and demonstrating your ability? And it? So it's really about how you demonstrate credibility. Are you demonstrating it in a conversational way.

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00:16:58.130 --> 00:17:18.939

Stephanie Bogan: where you do, delivering it in a content way? And again, conversation is still content. But it's a different medium than actually delivering it in sort of a written form. There's no right or wrong, and it's Adam alluded to. There's a lot of cross pollination in those strategies. What we want you to think about today is which are the ones that are really going to drive your growth.

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00:17:21.780 --> 00:17:42.090

Stephanie Bogan: Adam, I know, when we first started this conversation you were a lot less confident about what you had to say, what you had to share, whether people would listen and care as you reflect on right now, 5 years later, with a lot of success. Can you sort of reflect on how you felt back then, and what would you share with advisors listening now?

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00:17:42.090 --> 00:18:00.149

Adam Cmejla, CFP®: Well, and and it tease up perfectly to something that I just put in chat where like Patrick mentioned. He didn't look at the number of views for his, but you know, for the first year didn't care how many views he got, and that was the same way with the podcast when I decided to produce A, podcast I made a commitment to myself. And I told Kyle, my producer, who's been my producer from day one.

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00:18:00.150 --> 00:18:15.959

Adam Cmejla, CFP®: I said, don't tell me download numbers. I don't care. I don't want to be influenced by that. I don't want to have this this this weight on me of needing to produce for download. I just want to produce content. And so I made the initial commitment to not look at the number of downloads for the first 6 months.

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00:18:16.010 --> 00:18:39.319

Adam Cmejla, CFP®: until we got our first triage call about 5 months into it. And that was kind of like, oh, we might actually have something here like, Where is this coming from? So I believe it was about 5 months in is when I actually started looking at the first download numbers. And I actually, in the podcast presentation that we're going to be doing that growth retreat. I share the trajectory, the the the graph that shows the number of downloads that the show has gotten on a monthly basis.

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00:18:39.890 --> 00:19:00.550

Adam Cmejla, CFP®: And it's it's textbook from everything that you've seen in content creation. Right. It starts really, really, really small down here for a long time. And then it just, you know, just starts that that D, I say, close to hockey stick. It is a little bit more linear for the first couple of years, but we are seeing a a decent uptick now. Within the last 12 months. I think the

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00:19:00.700 --> 00:19:04.450

Adam Cmejla, CFP®: the feeling or the

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00:19:04.750 --> 00:19:15.180

Adam Cmejla, CFP®: the concern that a lot of people have with content. Creation is one of 2 things, advisors number one they feel like. Oh, well, I can't give that information away, because that's what people pay for.

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00:19:15.430 --> 00:19:29.099

Adam Cmejla, CFP®: And Number 2 is kind of the impostor syndrome was like, it's just me like, does someone really



care what I have to say? Does does that really really matter? I'm not that smart. I'm just a Guy, I'm just. I'm just an advisor. And mind you, at the beginning

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00:19:29.100 --> 00:19:46.319

Adam Cmejla, CFP®: I didn't have this like 10 year track record of working with optometrists. And now I'm just finally deciding to put my content out there. No, I was building the airplane as we fluid as far as building the service model, and the advice along that. So the podcast was very, very parallel. The growth of the podcast

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00:19:46.320 --> 00:19:58.539

Adam Cmejla, CFP®: was very, very parallel to the growth and expertise, if you will, on the on the advisory side of things. So what I would say to to kind of answer those 2 questions in reverse order. So number one

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00:19:58.950 --> 00:20:10.639

Adam Cmejla, CFP®: is the idea that. And this is a phrase that I thought of as I was working, working my way through my own limiting beliefs. Of who am I to advise optometrists. I learned, and I kind of came up with this phrase that

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00:20:10.780 --> 00:20:24.349

Adam Cmejla, CFP®: any niche advisor, what you know that makes you an expert in your niche is not a significant amount of knowledge more than any other advisor notes, especially anybody that's gone through Cfp program or through to the Cfp training.

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00:20:24.890 --> 00:20:41.180

Adam Cmejla, CFP®: But it's the right amount of knowledge that makes all the difference in the world to your unique audience. So what I know is an in in our specialization with optometry. Do I know that we can talk about P. And and balance sheets and statement of cash flows and a few other nuances

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00:20:41.320 --> 00:20:51.129

Adam Cmejla, CFP®: that the vast majority of advisors either don't know, or maybe no enough to be dangerous. Yes. Is it the Mount Everest of knowledge that

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00:20:51.510 --> 00:21:05.669

Adam Cmejla, CFP®: only Adam can learn because I'm the smartest if I know I am not that sure I'm not the purpose of the box. I can promise you that. but it's the right amount of knowledge that matters to the audience at which I'm talking to.

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00:21:05.890 --> 00:21:23.229

Adam Cmejla, CFP®: And so when you do that, and then you realize that the answer to Number one is. you give it all away because you're giving away information. You're not giving away knowledge, and you're certainly not giving away wisdom right? The wisdom is to help the client execute on the decision the right way the first time.

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00:21:23.760 --> 00:21:41.349

Adam Cmejla, CFP®: So your it if you have something valuable to share, and you sharing that value, is not discounting the value that you would bring to that audience or to that listener, reader, subscriber, if they were to engage with you in any type of one on one or one of many service model that you may offer

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00:21:44.060 --> 00:22:08.830

Stephanie Bogan: the thing that I was. I was just texting Kevin Kevin in the chat. The thing that I really think holds advisors back here is this idea that I can't. I shouldn't. I don't know how. What will people think? Are they listening. It's not an execution issue. We know this is really interesting. Here's what we know when Michael's doing the big marketing study now, which we're huge fans of, and he comes and shares with us each year.



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00:22:08.830 --> 00:22:23.249

Stephanie Bogan: one of us, my prior firm. We did the first big marketing study in the space years and years ago before I retired, and one of the things that we found which was wildly interesting to me was that when we asked people what were the top 3 things that worked for them.

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00:22:23.410 --> 00:22:28.720

Stephanie Bogan: And then we asked people what were the top? 3 things that didn't work for them. Do you know what was on both lists.

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00:22:31.260 --> 00:22:34.689

Stephanie Bogan: The same thanks. It was staggering.

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00:22:35.020 --> 00:22:54.820

Stephanie Bogan: One advisor would be like seminars or webinars or blogs, or this is like crushing it. And another group of people would say, I tried this, and it didn't work. So it really is about choosing and then getting clear and conscious about how to Adam's point. How are you actually going to execute on that in a simple way, so that you make sure that you get the upside

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00:22:54.850 --> 00:23:06.969

Stephanie Bogan: so often? We sit in the space of feeling afraid, like, what if this doesn't work? But will people think, how long is it going to take? And those are the things that really really hold us back.

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00:23:07.030 --> 00:23:23.470

Stephanie Bogan: I made a note when Adam was talking. Because I think it's really important. We have this like real hang up about capability like I? What if I don't know? And what about this? And who am I going to ask, and what questions could I even have? And who are like, I don't know enough

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00:23:23.680 --> 00:23:44.729

Stephanie Bogan: to fill in the blank. But the number of people doing any of the things that we're doing well is a very small percentage in our space. If you show up, you pick a channel, you develop a strategy, and you actually execute on it the high the probability of your success is much, much higher. The issue is, we lack the commitment

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00:23:44.880 --> 00:23:47.840

Stephanie Bogan: to share our story

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00:23:47.860 --> 00:24:08.069

Stephanie Bogan: in a way that stands out. I don't care if it's a podcast or a blog or speaking, we're so hesitant and reserved and conservative when it comes to genuinely believing that we have something to share. So I'm gonna blow your mind with this story. I started my first business consulting firm at the age of 24

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00:24:09.330 --> 00:24:14.280

Stephanie Bogan: 24. I'd been working in an estate playing well, management firm. Since I was

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Stephanie Bogan: 20

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00:24:17.140 --> 00:24:45.589



Stephanie Bogan: and my first Fpa. Conference I showed up knowing no one. I was so radically insecure which would be appropriate, like, you know, 22 years old, with no actual experience except for working in a firm for a couple of years, and I ran into Bob Virus, and I had a really cool conversation with him, and he walked me over to the financial planning booth and said, I think you should talk to this girl about writing a column, and in that moment my stomach dropped.

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00:24:46.260 --> 00:24:48.960

Stephanie Bogan: and I thought. Oh, my God!

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00:24:49.110 --> 00:25:00.209

Stephanie Bogan: How am I going to do that? I'm 24 years old. I don't know anybody. I'm walking around these hallways feeling radically insecure, and this guy thinks that I should be writing an article for an established magazine.

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00:25:01.290 --> 00:25:06.220

Stephanie Bogan: I just smile and fake my way through it. I was like, yes, absolutely. That would be amazing.

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00:25:07.520 --> 00:25:17.299

Stephanie Bogan: And on the other side of that I actually got the column, which was super cool. and I had to sit in the space of believing that I had something valuable to share.

116

00:25:17.360 --> 00:25:29.479

Stephanie Bogan: and that was the real work, not, you know, because I had something valuable to share to Bob, and he picked up on it and was a really cool bridge to that opportunity, right? Talk about our influencers.

117

00:25:29.760 --> 00:25:40.760

Stephanie Bogan: But I had to overcome the idea that I had something to say at 24 years old, in the space where the average advisor is well over the age of 55 and male.

118

00:25:43.090 --> 00:25:49.930

Stephanie Bogan: So that is the piece that we can't teeth. That is the belief that's the mindset work of

119

00:25:50.020 --> 00:25:58.389

Stephanie Bogan: right for the trash can podcast for the trash. Can you're not doing it to get it perfect. You're not go back and watch my early videos. They're all

120

00:25:58.600 --> 00:26:17.620

Stephanie Bogan: all on the Internet. Oh, my God! I watch them now when I'm Adam has this, hey? Red, I'm just like, Oh, my God! I hope nobody's looking. And then some guy called me last week and he's like, Oh, was on the Internet. I watched all your videos since the dawn of time, and we want to hire you and do all this amazing stuff. And I was like in my head, I was like, what was he watching

121

00:26:17.820 --> 00:26:18.930

Stephanie Bogan: like? Really

122

00:26:19.630 --> 00:26:27.029

Stephanie Bogan: like those videos in me in my twenties and early thirties. Right? People like that like that's the insecurity that really kicks in.

123



00:26:27.320 --> 00:26:32.449

Stephanie Bogan: So yes, you, the honest answer. Here is, you really, really do have something valuable to share.

124

00:26:32.480 --> 00:26:40.609

Stephanie Bogan: And so it's about getting over those mental hurdles. I don't know what to create. It's not going to be good. No one's paying attention. I'm going to look bad.

125

00:26:41.470 --> 00:26:45.570

Stephanie Bogan: I'm here to dispense the uncomfortable truth for you today.

126

00:26:46.370 --> 00:27:07.939

Stephanie Bogan: All of those things will probably be true at some times. I have sat here, Adam. I'm sure you've sat there going. I don't know what to create today, like Chat Gbt is amazing, because for like give me 10 ideas. But I used to like I don't know. I felt like I had 7,000 ideas last week, all inspired. Now I'm sitting here staring at a piece of paper, and I'm like I got nothing

127

00:27:08.020 --> 00:27:21.279

Stephanie Bogan: right. It's not going to be good. We all live with that no one's paying attention. We just assume like, because you get that one person that comments. And you're like, Oh, my God! For every one person that comments. There's like a hundred that feel the same way.

128

00:27:21.390 --> 00:27:24.810

Stephanie Bogan: and you are going to look bad. Sometimes someone is going to read something and be like it.

129

00:27:25.420 --> 00:27:33.149

Stephanie Bogan: That person's not going to call you. And it's okay, because someone else is going to read or hear or listen to something and go. Yes.

130

00:27:33.450 --> 00:27:34.710

Stephanie Bogan: yes.

131

00:27:34.970 --> 00:27:55.960

Stephanie Bogan: and it's okay to get better over time. Right? We really hold ourselves back. If Adam stopped because of his first videos, we have them in. One of our, I think was the video value session, right? The the dark screen. Do you remember that I'm like the screen is dark. He's all like, Hi, everybody I'm like, oh, my God! Don't do that!

132

00:27:55.980 --> 00:28:14.539

Adam Cmejla, CFP®: I look back at when I first started using loom as a way to communicate to clients and the the background, the lighting, even the lighting I have right now is not that spectacular? I don't put a lot of effort into that. But yeah, some of the educational enrollment sessions that I did for 400 one's home. Those are cringe-worthy.

133

00:28:15.500 --> 00:28:21.779

Stephanie Bogan: You can't get better until you start, and if you think you have to start it perfect.

134

00:28:21.780 --> 00:28:48.680

Stephanie Bogan: you won't. Which means you inevitably was create a space in which you can't start or get better. And I don't know how to get results from that space. So it's really about, can we start to get really clear on the channels we want to choose because there's going to be some level of resistance whether it's right circumstantial



economic head space. But, Adam, do you want to talk a little bit about the different channels, and how you went through the process of figuring out what worked for you.

135

00:28:49.690 --> 00:28:51.340

Adam Cmejla, CFP®: I think the

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00:28:52.060 --> 00:29:02.869

Adam Cmejla, CFP®: and this is gonna sound. I I hesitate and saying this because I always want to like as when when I say something, I want there to be direct action associated with it. So

137

00:29:03.790 --> 00:29:11.570

Adam Cmejla, CFP®: with a take this with a grain of salt. I think you have to be very observant as you start down this content creation path

138

00:29:11.670 --> 00:29:17.250

Adam Cmejla, CFP®: to look for the opportunities that are going to present themselves right in front of you. So let me give you an example.

139

00:29:17.300 --> 00:29:42.430

Adam Cmejla, CFP®: I would have when I started the podcast I knew I didn't want to be just a solo podcast with me talking. And I also knew I didn't want it to be just the setting up. Guess because in part, yeah, I had that that initial thought of like Gosh! Who am I going to find and like? Can I find this many guests to be on the show? If I, if I want to create a hundred plus episodes, kind of really find. So I knew it was going to be a mix of both. But when I started having guests

140

00:29:42.430 --> 00:29:58.099

Adam Cmejla, CFP®: inevitably what would happen when I was using Zencaster as the original marketing platform. Zencaster had to. When you were done recording, Zencaster would take sometimes 2 to 3 min to upload the track to the cloud, so I would always tell guess before I started, I'd say

141

00:29:58.330 --> 00:30:08.010

Adam Cmejla, CFP®: when it's done when I stop recording. If you can stay on the call for another one or 2, maybe 3 min to let them out of it, and the number of conversations that we would have after that

142

00:30:08.070 --> 00:30:17.190

Adam Cmejla, CFP®: would. Those are the conversations that ended up opening doors to speaking engagements or to writing, or to

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00:30:17.350 --> 00:30:32.699

Adam Cmejla, CFP®: an introduction to to produce content for someone else's platform. It's like, Hey, that was a really good conversation, you know. Chris over here has has a podcast I code media, I think you'd be really good for that. Would you want to do that like? Those are the little spontaneous conversations that happened.

144

00:30:32.890 --> 00:30:42.529

Adam Cmejla, CFP®: and I'm and and like, I said, I know this isn't directionally directly actionable, but all I can say is to have faith in the process that those opportunities will show up

145

00:30:42.570 --> 00:30:46.680

Adam Cmejla, CFP®: when you commit to this process. And for me it was



146

00:30:46.780 --> 00:31:16.460

Adam Cmejla, CFP®: yes. And like, I said, in the beginning pop, you can insert podcasting with writing or speaking, any one of those things will have the opportunity to cross, pollinate with various different platforms, and we could spend an entire session. I mean, we could do. Case study after case study. If you give me what your channel is, I will rattle off half a dozen different ways in which you can cross pollinate whatever you're doing with other ways in which to get your target message out in front of your target audience.

147

00:31:16.720 --> 00:31:26.149

Adam Cmejla, CFP®: so don't feel like, just because you're choosing this one channel that you will not be able to have influence in other channels. The key to that is determining

148

00:31:26.300 --> 00:31:53.049

Adam Cmejla, CFP®: who you are going to bring along for the ride, not how are you going to do all that? Because, as those doors open up there just isn't going to be enough time. You will need to figure out who you need to have along, even in the very beginning. Like I said, I can promise you 2,020 money would not be what it is today without me hiring Kyle as my producer from day one. If I would have gone the route and said, Patrick, I'm not sure if you still, or if you edit your own videos currently, or you did in the beginning.

149

00:31:53.200 --> 00:32:19.790

Adam Cmejla, CFP®: I would be lucky knowing myself, I would have been lucky to maybe get through episode through 5 episodes, because I the idea of me sitting down at the computer and editing an audio file A, I have no idea what I'm doing, which means B, it's going to be a pain in the ass and see it's going to take for freaking ever. So that is a trifecta of friction to cause me to stop doing something, so remove the barriers of friction, find the who's that can help

150

00:32:20.030 --> 00:32:27.230

Adam Cmejla, CFP®: that can help you execute on not only your unique or your ideal activity.

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00:32:27.280 --> 00:32:34.300

Adam Cmejla, CFP®: and then also find the whos that are going to be able to take whatever you create initially and spread the word in other channels.

152

00:32:34.920 --> 00:32:46.539

Stephanie Bogan: Yeah. And I think you know as a take away here. And you look at what's on the on the screen is, there are really 3 different areas where you can focus that energy and attention, personal marketing.

153

00:32:46.840 --> 00:33:08.330

Stephanie Bogan: low-lying fruit client referrals and their centers of influence. Right speaking, pat. What we call passion prospecting. What? What do you love to do? Where do you love to go? How are you right out there? Networking? That's all predicated on having good brand messaging? Right? What's your story? How does that show up on your website? What's your social media strategy to write, continue to to expand and edify that brand.

154

00:33:08.330 --> 00:33:25.459

Stephanie Bogan: And then, as Adam talks a lot about, and more and more of you are really digging into and I know it seems like it's all big and popular, and maybe it's all worked out. But this digital marketing channel is still very nominal relative to the overall advisor population.

155

00:33:25.530 --> 00:33:43.590

Stephanie Bogan: So things like video show up in webinars, Youtube live streams, right? And we've had advisors be



very successful with all of those strategies. You've got audio where you've got podcasts, radio again, sort of that live stream format and then written, you've got content. You cut blogs. You've got white papers. You've got articles.

156

00:33:43.630 --> 00:34:11.769

Stephanie Bogan: And, as Adam pointed out, there's no one strategy because any one of these pipelines are going to create offshoots. Think code reliefs on the freeway. If you're doing a blog, you'll get invited to speak. If you're doing a lot of speaking, you might get invited to. Podcast so you want to be proficient. And how you want to kind of build your brand and grow strategy in each of these channels. But it's also about getting really clear about how you want to drive your primary in your primary lead engine.

157

00:34:12.100 --> 00:34:33.169

Stephanie Bogan: And then the thing we always talk about here is any of these channels should always include a good SEO strategy on your website, because that's just low lying fruit that it's very easy to overlook, and that really amplifies your success and any of the strategies making sure that your website is not working against you. And then it's really elevating the and amplifying the work that you're doing?

158

00:34:33.460 --> 00:34:56.170

Stephanie Bogan: what's it? Take? So think about brand messaging right? This is where we have general ideas, but so much when you think about our brand lessons and telling our story and our prospect process. We need to get real in the niche lesson. We need to get really clear on what our target market is, and what they care about. Adam can speak. My God! I was in a speaking engagement to that with a thousand people last week.

159

00:34:56.170 --> 00:35:15.149

Stephanie Bogan: and I was using Adam as an example, and I'm like Adam knows more about optometrist than most of tomatoes know about optometry practices like he can tell you about their cash flow issues, their equity issues. They're hiring issues like, I don't know. Adam had something that I was reading, and I was like, Wow, I wouldn't even to assume that Adam knew that. And I was like, of course, Adam would know that

160

00:35:15.880 --> 00:35:38.440

Stephanie Bogan: right. He has the ability to really know his audience and what they care about, which means that, irrespective of the medium that he chooses, he's going to be really effective at doing that. See you here, you understand you, piece, right? This telling the story if you will. So you want to clarify needs and pain points, because there's a difference between doing a podcast or a speaking engagement or writing a blog.

161

00:35:38.500 --> 00:35:53.720

Stephanie Bogan: We're even sitting across from a Coi and saying, Hey, I'm a great financial advisor, and here's stuff that I can do for you. And really speaking to right the brand, promise the value in the outcome. So we've talked a lot about that in different lessons. But it's really important that you don't

162

00:35:54.300 --> 00:36:11.270

Stephanie Bogan: over index on the strategy and under index on the story. If that makes sense right, you can do a webinar. You can do a blog, you can do a podcast. You can do coi meetings and find that it's very flat in terms of results. Because you're not creating that compelling story that they're really buying into.

163

00:36:11.730 --> 00:36:14.510

Stephanie Bogan: So that's always going to be where you want to start.

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00:36:14.530 --> 00:36:36.650

Stephanie Bogan: when we look at personal marketing, right client referrals to AI speaking and passion prospecting right that networking are the primary drivers of growth in their space. Those are shrinking relative to digital strategies, because more, more and more still, a small percentage. But more and more advisors are driving into that



digital growth like Adam

165

00:36:36.690 --> 00:37:00.359

Stephanie Bogan: and Tiffany and Jared, and a lot of our other advisors, but it doesn't supplant or replace these strategies if you're doing them or want to continue to do them. So you've got to show up with authenticity, like what it actually takes is not being afraid to tell a strong story, have a voice, and really show up and talk to your audience. Anything less is just gonna get lost in the mix. These days.

166

00:37:00.360 --> 00:37:22.560

Stephanie Bogan: You also have to go where your target body audience is right, Adams, advisors are listening to podcast but they're also going to conferences. They're reading trade journals. So you're really gonna have a multi Prom strategy. If we go back to that that kind of marketing wheel. Once you choose your primary strategy, it's it's in the center with your content, whatever that content is.

167

00:37:22.630 --> 00:37:34.250

Stephanie Bogan: And then you're still gonna drive it to any of the other strategies that you're using. Right? What I speak about shows up in podcast shows up in articles, great because we're kind of stacking that content as we go.

168

00:37:34.990 --> 00:37:46.399

Stephanie Bogan: so we want to, consistently. And that's the piece. Whether it's coi meetings, client, referral speaking, etc. It's about consistently demonstrating expertise. So we've got lessons on each of these pieces.

169

00:37:46.490 --> 00:38:08.270

Stephanie Bogan: But if this is a core part of your strategy, what I want you to think about is, is it primary or secondary? And how much of your time are you going to invest in it in a systematic way? Right emails, blogs, videos follow ups meetings and how much you're going to do in that specialized rate, 1 one on one or small group interactions that really elevate the work that you're doing

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00:38:08.430 --> 00:38:15.750

Stephanie Bogan: So that's the foundation. And then, Adam, you want to talk a little bit about digital marketing and the pieces that go into that.

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00:38:17.250 --> 00:38:25.420

Adam Cmejla, CFP®: yes, I can talk about how important it is to find someone that knows what's important about that.

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00:38:25.460 --> 00:38:38.230

Adam Cmejla, CFP®: Admittedly, this is an area. Well, so digital marketing, yes, on the audio side, And and again, not to give away the farm too much, or as a tease for what we're gonna be talking about a growth retreat out.

173

00:38:38.560 --> 00:38:53.229

Adam Cmejla, CFP®: Both Jared and I will be giving you the deep dive on our specific platforms as it pertains to podcasting. Jared's also. Jared also produces a podcast and it's cross-pollinated that a little bit with Youtube channel as well.

174

00:38:53.260 --> 00:38:58.170

Adam Cmejla, CFP®: So I won't give away all the details on that. I will say that it is

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00:38:58.500 --> 00:39:09.550

Adam Cmejla, CFP®: very easy to take. I think it was 5 com. At last year's Growth retreat gave a list of for every.



podcast episode. You can create

176

00:39:09.620 --> 00:39:16.480

Adam Cmejla, CFP®: 41, I think, is what they came up with 41 different pieces of content off of one podcast. Episode.

177

00:39:16.780 --> 00:39:21.720

Adam Cmejla, CFP®: so there's no shortage of ways to repurpose the

178

00:39:21.780 --> 00:39:50.640

Adam Cmejla, CFP®: content that you're creating. And this is why I joked in the beginning of find people that know how to do this and do it well, because a it's a time commitment to do it. And B. There is a there is an art to doing that. So I am working in an ongoing relationship with Will. Now's team, with Dave and Chase to take our top 20 most downloaded podcast episodes over the history of the show and turn those into keywords specific as CEO,

179

00:39:51.060 --> 00:39:55.270

Adam Cmejla, CFP®: driven long form blog posts. Because

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00:39:55.590 --> 00:40:14.549

Adam Cmejla, CFP®: yes, there are, we have a a growing following of the podcast but it's still only a fraction of a percentage of the overall number of license studies in the country. So not every as much as I love, every every. Oh, d, to listen to a podcast. When I go to speaking events, I'm like, do this in a podcast. I still will get what's up what's a podcast. So

181

00:40:15.110 --> 00:40:36.740

Adam Cmejla, CFP®: it is. I know it. It. It can sometimes be like, oh, because we're so close to it that means everybody is close to it. And that's not the case. So even though you may fall in love with your channel, and do really really well at that channel, and thus, by doing that you think, well, everybody does this channel or or listens to that. Your channel that you're choosing right writing, speaking,

182

00:40:37.000 --> 00:40:54.749

Adam Cmejla, CFP®: podcasting, Youtube, that's not the case. And so that's where the benefit of taking a digital approach or the channel that you choose from a digital standpoint, whether it's video, audio or written. Any one of the 3 that you see up here, it is very, very easy

183

00:40:55.050 --> 00:41:07.449

Adam Cmejla, CFP®: to repurpose that into one of the other ones written here, like, I said podcast to written video, I mean, we record a podcast on riverside with a click of a button. I could broadcast that to Youtube and do a live stream.

184

00:41:07.770 --> 00:41:09.199

Adam Cmejla, CFP®: Not there yet.

185

00:41:09.470 --> 00:41:29.419

Adam Cmejla, CFP®: Kyle will probably tell me that I'm missing on on opportunities. Yes, I know that, Kyle. In due time, my friend. one thing at a time. But there's all kinds of different ways in which you can repurpose that. Yeah, and that I think that's a really good point. If you think about, you know, kind of the key messages on the slide that we're looking at. It's one you just have to choose your primary platform or platforms

186



00:41:29.420 --> 00:41:52.979

Stephanie Bogan: again, choosing. One doesn't mean that you won't operate in others. But what's going to be your primary legion effort? And then you can expand those efforts right to those supporting channels, to what's really important issue, to find your position. Adam has really staked his ground. Right? Is the optometry right? Optimizing your practice and your exit strategy for optometrist like, that's really the ground that he owns.

187

00:41:52.980 --> 00:42:01.510

Stephanie Bogan: And so everything he does, whether it's podcast or speaking is right, really driven through that. And then, as he pointed out, it's about that consistency. So

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00:42:01.790 --> 00:42:16.410

Stephanie Bogan: you know, if you like, Video, it doesn't mean you can't do audio if you like written. It doesn't mean you can't translate that into other things, but it's really about getting clear on where it does or doesn't. Digital marketing fit into your strategy for some of you. It won't. And that's utterly okay.

189

00:42:17.050 --> 00:42:35.820

Stephanie Bogan: But that means that you're gonna want to go back right to those personal strategies and really really double down and build campaigns to make sure that you're really elevating the experience which is true for all of those strategies. Right? It's not just about picking one. It's about then executing a strategy and campaigns around it.

190

00:42:35.820 --> 00:42:49.020

Stephanie Bogan: it's funny. Michael and I had a conversation a couple of years ago about this idea of being a digital sharecropper, which is really a conversation around, are you creating your own audience, or are you borrowing other people's?

191

00:42:49.020 --> 00:43:14.459

Stephanie Bogan: So if you think about the kind of the mediums around the wheel. If you're speaking, you're borrowing other people's audience, if you're a guest on a podcast you're borrowing someone else's audience. If you're writing and you're building out a blog, or you've got a podcast or Youtube or an email line, then you're building your own audience, right. So you own that distribution, pipeline. And what we would say is, both of those are effective strategies.

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00:43:14.710 --> 00:43:18.540

Stephanie Bogan: It's about leveraging other people's pipeline

193

00:43:18.870 --> 00:43:45.020

Stephanie Bogan: right sharecropping their field while you are very intentionally building your own right database rate leads so that you're creating a gravity so that you have right 5,000. 10,000. Whatever. The number is 60,000, like my right people on that mailing list, because what we know with certainty is as those list fields. There's statistics, right? Some percentage of those people on a consistent basis will take you up on the offer.

194

00:43:45.050 --> 00:43:55.610

Stephanie Bogan: So it's really about not only choosing your channel, but also recognizing, like, you can choose podcasts and it's right. You can go out and start doing a bunch of podcasts pretty easily.

195

00:43:55.670 --> 00:44:17.620

Stephanie Bogan: which is different than starting your own podcast and you can do as many of us do rate a combination of the 2. So but I want you to be really clear about, are you borrowing an audience. Are you building an audience? Are you attempting to do both? Because the audiences, of course, where the economic upside is right, the ability to have impact and find new clients is really in growing that audience.



196

00:44:20.340 --> 00:44:35.919

Stephanie Bogan: When Adam sat down and thought about what he wanted to do, I'm pretty sure he asked himself 2 questions, because we've had this conversation before. Right? And it is what's easiest for you. If you hate public speaking, I am not going to tell you to go get on the stage in front of a thousand people like I did last week.

197

00:44:36.140 --> 00:44:48.229

Stephanie Bogan: That'd be not. That'd be madness. That doesn't mean it's not an effective strategy. It might not even mean it's a viable strategy like Adam. You're really good at this speaking thing. You're really articulate, and you make your point like

198

00:44:48.270 --> 00:44:58.469

Stephanie Bogan: there might be some headspace or some mindset work there, but there's also the right I hate. I hate sitting down and writing. I hate getting on a stage like. Don't force yourself to eat broccoli

199

00:44:58.500 --> 00:45:00.590

Stephanie Bogan: if you hate broccoli

200

00:45:01.730 --> 00:45:07.410

Stephanie Bogan: and be simultaneously honest with yourself

201

00:45:07.600 --> 00:45:32.459

Stephanie Bogan: about what you're eating and why? Well, I don't like eating broccoli because it's not as good, but it actually has some negative health benefits. I want to deal with that right? So what's easy for you, and then how can you set yourself up so that can compound over time? Right? If you like, writing? That's a very easy thing to scale over time. To Adam's point, like podcast or Youtube, it's just about sitting down and doing it on a consistent basis.

202

00:45:32.730 --> 00:45:41.349

Stephanie Bogan: So what are some of the things that are easiest for you as you think about driving growth. Grant, what's what's really driving your income engine? Or, as you think about this.

203

00:45:41.420 --> 00:45:45.620

Stephanie Bogan: what's easy for you that you think you could compound even more over time

204

00:45:47.620 --> 00:45:55.130

Grant Bledsoe: stuff that I that I like doing. I like talking. I like being in front of the video. I'm pretty comfortable with it. And so I, I have a, podcast

205

00:45:55.270 --> 00:46:15.700

Grant Bledsoe: we're probably 2 and a half years into it. And the numbers are are growing, you know, steadily, but not not very dramatically. And so I think the next step for scaling that up is to Have more outreach and be a guest on on other people's platforms. And there's a lot of people doing that across the industry that I think is a really good way to

206

00:46:15.920 --> 00:46:45.270

Stephanie Bogan: borrow their audiences, as you put it, kind of bring them back on your mailing list for your your, podcast subscriber list. So that's that's kind of the next thing for us. Yeah, that's where you would take the yeah, think about that messaging or that brand, right? That marketing wheel that we talk about. And you would put your podcast in the middle, which you've done right. That's your anchor pipeline. And then you would look around every one of the



channels on the wheel and then ask yourself how you could leverage it right? Podcast already I've already got one. But I can do dip, guest. Podcast what would happen if I went out and did

207

00:46:45.270 --> 00:47:09.000

Stephanie Bogan: right. For you know, 2 to 4 guest podcasts a month. And that gives you a direction to pursue. I gotta go find podcast. I can look those up. I can find them. I can outreach to people so so often that, like, what do I do next? Is the part that slows us down. So I think that's a really good point that you're making of, like we've got to figure out what's easy. How do we compound it. And then how do we create calls to action to really move ourselves down the road? If you will

208

00:47:09.130 --> 00:47:34.679

Adam Cmejla, CFP®: grant just to add some some tactical feedback to that as well. One of unless it's a very extenuating circumstance to nigga to non negotiable things for me when I get asked to be a guest on a commentary, podcast or a, they have to agree to share the audio with me, so that I can release that episode on 2020 money as a guest appearance on theirs, and then I have. They have to agree to be a guest on our show, assuming that it fits, and and the the second one is the is the negotiable part, because

209

00:47:34.680 --> 00:47:40.800

Adam Cmejla, CFP®: sometimes it's just not a fit for me to be on their show, but they want me to be on.

210

00:47:41.010 --> 00:47:53.479

Adam Cmejla, CFP®: It's not a fit for them to be on my show, but it is a fit for me to be on their show. It's rare that that happens. but they have to share the audio with me so that I can be a guest or so that I can release it, and no one has ever said no to that, because

211

00:47:54.280 --> 00:48:17.959

Adam Cmejla, CFP®: they're looking for the same thing that I am. They're looking for audience they're looking for. They're looking for years. They're looking for listeners. So we're able to cross promote So consider making that part of your pitch as you're looking to get on other shows, active by podcast definition is considered. An episode that has been re, that is, active, shows are considered active, shows are shows that have released an episode within the last 90 days.

212

00:48:17.960 --> 00:48:31.759

Adam Cmejla, CFP®: So whatever your niche is, whatever or however, you're searching for other podcasts to be on, look for shows that have released an episode within the last 90 days. Those are considered active, and reach out to those creators and ask to be a guest on the show with those 2 caveats.

213

00:48:31.960 --> 00:48:39.890

Stephanie Bogan: Are you taking that audio, Adam? And then releasing it in place of your guest appearance on somebody else's show

214

00:48:40.120 --> 00:48:51.249

Grant Bledsoe: in place of a weekly episode or so in in replacement does. Yeah, I love it because it did 2 for one, I get to be on their show. Get exposure. That's one week that are on 3 quarter show.

215

00:48:52.460 --> 00:49:18.959

Stephanie Bogan: Yeah, that's a great point. So it's what we call content stacking anytime. You're using content in one place to add Miss Point, about that icom session from last year. There is no question 1020, 30, or 40 other places that you can use it around the wheel. If you do a podcast how is it showing up in social media is that podcast being converted into a blog is that being converted into a letter or an email to your cli that says, Hey, we really just



216

00:49:18.960 --> 00:49:36.729

Stephanie Bogan: sat down and talked about these particular topics. Here are 3 bullet points that I think might be relevant to your practice in your clients. That might be then turned into a topic for a speaking engagement or a webinar, like literally any piece of content can, and ultimately should be translated

217

00:49:36.730 --> 00:49:53.389

Stephanie Bogan: for any and all of the channels around the wheel that you're engaging in. That does not mean you take every piece of content and try to splash it across every single channel. If you don't have a structure and system in place, right? Because then you'll just get a whole lot of throwing spaghetti on the wall.

218

00:49:54.260 --> 00:49:59.569

Stephanie Bogan: But that's what I love about. The wheel is right, your core pipeline goes in the middle.

219

00:49:59.820 --> 00:50:18.930

Stephanie Bogan: and then you look around the wheel. I call it content stacking anytime. You do something. It's what do I do in every other aspect of the wheel, hey? I was just invited to a podcast to talk about X Y or Z. Adam gets invited to a lot of those by the way, so he can't send clients, an email every single time it would get annoying.

220

00:50:19.080 --> 00:50:46.180

Stephanie Bogan: But he can do a state of the Union check in client experience, touch point once a quarter, or maybe twice a year, or even once a year, that just says, Hey, I continue to really invest time in right building my expertise and engaging with community. Here are the places I've talked here are the key to like literally it. He's doing so much of it that he can't share at all. But he could say, Hey, you know I did 5 or 6 speaking engagements this quarter, and here were the 3 topics

221

00:50:46.180 --> 00:50:55.330

Stephanie Bogan: that eptometers are really interested in. Just be a client communication. Right here are the questions that we're getting. It's great that you guys have answered these. If you have friends that have these questions, let us know.

222

00:50:55.330 --> 00:51:07.000

Stephanie Bogan: So there's no shortage of opportunities to cross-pollinate your content, your respective, the format, the main goal of all of that is only always and ever to demonstrate your expertise.

223

00:51:07.630 --> 00:51:17.639

Stephanie Bogan: And you guys think that you have to be the smartest person on the planet, and no more than everyone else, and to answer every question before you put yourself out there.

224

00:51:18.240 --> 00:51:35.520

Stephanie Bogan: and what I know is, I started a consulting firm at 24, and I just had to know that much more than the people that I was serving. Our ability to be experts isn't actually about our expertise. This is the character questionable part. It's about our ability to communicate stuff that we know.

225

00:51:37.110 --> 00:51:55.439

Stephanie Bogan: Now, that does not mean that you should not have the credibility and the expertise behind those marketing messages and communications. But I've seen a lot of advisors in my 30 years in this space, and some of the best marketers are the best advisors, and a lot of the best advisors are not the best marketers.

226

00:51:55.910 --> 00:52:20.179



Stephanie Bogan: because we get it. It'd be great if those were 2 or together like that would be, and those would be great, those the atoms and the tailors, and the Michael's like. Those are the people that you see that you just that, really. But we have the ability to build those habits, thought processes and disciplines into our marketing. Some people are more naturally geared to it, and that's super cool. But I was actually, as we were preparing for this call, Adam, I was thinking about Taylor.

227

00:52:20.440 --> 00:52:37.350

Stephanie Bogan: right who you're good friends with, and I'm good like Taylor started in the same boat as Adam. I've been doing this for like 10 years. I'm making a couple of 100 grand, and I am tired of beating my head up against the wall. And now he's been so good at marketing that right? He does the summits with Michael Kitis and others like.

228

00:52:37.430 --> 00:52:50.170

Stephanie Bogan: because he clicked into like he found his lane. He was spent 10 years sitting behind a wall of I can, and I shouldn't, and I don't know how, and I'm not growing. And now he's like a marketing prodigy in our space.

229

00:52:51.750 --> 00:53:09.939

Stephanie Bogan: because he was willing, through the same exact conversations, to make choices right, get clear, make choices, and commit to actions. And his was right. I'm gonna update my website. He had a podcast like Adam. And I remember the conversation vividly. He was like, it's been 2 years. I'm not getting any clients. I think I'm going to stop doing it.

230

00:53:10.510 --> 00:53:31.189

Stephanie Bogan: Maybe it's 3 years, and I was like, don't like, it's this runway conversation we joke now because I always use them an example like it's a 3 year runway, and Taylor, like always loves to pipe in. Well, for me it was a 5 year runway. He's like cause I spent 2 years like not executing in the way, you know, like there is definitely some fits and starts. If right, if you don't have that path to follow.

231

00:53:31.420 --> 00:53:43.329

Stephanie Bogan: So really, this is the mindset conversation that says demonstrating your expertise doesn't mean you have to be the world's leading expert. It means you have to have knowledge to share

232

00:53:43.760 --> 00:53:47.649

Stephanie Bogan: that is beneficial to the audience. That's it.

233

00:53:48.530 --> 00:54:10.949

Stephanie Bogan: Like the bar is actually pretty low when it comes to what can you say that people will value? But it's all the stuff that happens in our head that turns our ability, our ability to communicate value into a really uncomfortable conversation like, why should it ever be uncomfortable to communicate what you do, and how you do it, and how you can create value for people

234

00:54:11.320 --> 00:54:28.150

Stephanie Bogan: so demonstrating your expertise is a really big part of the equation, right? Since we think about right things that you can do. They're all here in the lesson you can go back in. You can look at the resources. What I really wanted to do now is, stop the Powerpoint. Let's see if I can do that pretty readily. Look at that

235

00:54:28.150 --> 00:54:43.199

Stephanie Bogan: and just open up. We've got about 35 or so minutes to really talk about. How are we? How are we sitting in the space of really consciously choosing our command, our our our channels, and then billing building committed plans around them.



236

00:54:43.210 --> 00:54:49.199

Stephanie Bogan: Patrick, I wanted to ask you if you wouldn't mind opening up just from a conversation perspective. Because I know you with.

237

00:54:49.230 --> 00:55:05.149

Stephanie Bogan: you know, when you, when you guys see the or what we'll call our success stories on the other side. Right? The atoms, the tailors. The time is the bends right. The Patrick's. In this case it's like, Oh, it was so easy, and I want to acknowledge that it's not always easy.

238

00:55:05.150 --> 00:55:24.769

Stephanie Bogan: There's effort, but the goal is to be worth it, Patrick, would you mind sharing just a little bit about like you didn't just start out with like this niche and the perfect Youtube Channel, do you can. You share a little bit about how you went through the process of figuring out your channels and experimenting and fits and starts, because I think it'd just be a good example of, like the reality of what goes into it.

239

00:55:27.850 --> 00:55:36.499

Patrick King: Yeah, I it was a jury, right? I think part of it was again back to, hey? I'm committed to this. I enjoy it.

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00:55:36.670 --> 00:55:42.229

Patrick King: And I just told my, I'm gonna give this experiment one year.

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00:55:42.320 --> 00:55:55.880

Patrick King: and I'm going to commit to doing a video a week for a year. And then we're gonna the the success of this and it really a

242

00:55:56.100 --> 00:55:57.930

Patrick King: like the year

243

00:55:58.200 --> 00:56:08.550

Patrick King: is when the the channel started off right? So you know, showing up every week and doing a video that nobody watched

244

00:56:08.730 --> 00:56:09.990

Patrick King: But

245

00:56:12.040 --> 00:56:17.920

Patrick King: but I won't send a my new prospect

246

00:56:18.170 --> 00:56:21.620

Patrick King: this year that

247

00:56:22.410 --> 00:56:33.190

Patrick King: yeah. There was a point halfway through that year where I started and look at who was watching these videos.

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00:56:33.320 --> 00:56:35.050

Patrick King: content at first.



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00:56:35.100 --> 00:56:43.530

Patrick King: but then I saw that people who were watching this were between 55, 65, and so they were just figured out how to retire.

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00:56:43.560 --> 00:56:45.749

Patrick King: And so I started talking to those people.

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00:56:46.110 --> 00:56:49.559

Patrick King: And all of a sudden, then I'm starting to book.

252

00:56:50.370 --> 00:56:53.269

Stephanie Bogan: Isn't it crazy? You're you're breaking up a little.

253

00:56:54.270 --> 00:57:06.889

Stephanie Bogan: Patrick, you're breaking up a little bit, but I think we got the the gist of that. The thing that I love about what Patrick just said is, you notice that moment where he said. Oh, they're just trying to figure out how to retire

254

00:57:07.850 --> 00:57:30.329

Stephanie Bogan: like that as a marketing pillar is gold. Right? Hey? Are you trying to figure out how to retire like if you start a video with you trying to figure out how to retire, what questions do you have? That's what I'm here for. You're right. You have questions on the answer. Guy like, that's a really compelling marketing position. The thing I love about Patrick's story is that when you think about his audience, people preparing to retire.

255

00:57:30.650 --> 00:57:33.179

Stephanie Bogan: do you think Youtube

256

00:57:35.590 --> 00:58:01.000

Stephanie Bogan: like that's not where our brains tend to go? And it really just shows that especially post Covid. It's like a snow globe, right? You can't assume that these people don't check email. And these people don't listen to it. It really is about finding the channel and the audience, and and just speaking your truth, and the the people that are there might like. It's amazing who will actually show up as you go through that process?

257

00:58:02.120 --> 00:58:14.069

Stephanie Bogan: Does anyone else who else has stories around choosing their channel? Or is anyone having challenges that they want to break down with Adam. And I to really think about how to work your way through that, that marketing wheel.

258

00:58:15.250 --> 00:58:17.610

Stephanie Bogan: This is the interactive part of today's session.

259

00:58:18.530 --> 00:58:21.210

Daren Chamblee: I've I've certainly had

260

00:58:21.340 --> 00:58:27.240

Daren Chamblee: challenges implementing I'll try the podcast i'll try the video.



261

00:58:27.410 --> 00:58:37.210

Daren Chamblee: I think one of the biggest things that I've learned is you can't do it all yourself. And I come from an audio and video background, and

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00:58:37.520 --> 00:58:46.499

Daren Chamblee: you can spend a lot of time if you embark on your own to do the editing. Do you? You name it? Do the posting.

263

00:58:46.650 --> 00:58:51.329

Daren Chamblee: even if you can do it, because it eventually gets monotonous, and

264

00:58:51.610 --> 00:58:54.590

Daren Chamblee: it just kind of drives you out of the out of the game.

265

00:58:54.850 --> 00:58:56.860

Daren Chamblee: But I'm looking to restart

266

00:58:57.090 --> 00:58:59.320

Daren Chamblee: The

267

00:58:59.400 --> 00:59:04.220

Daren Chamblee: my next change that I'm going to do is, I will search

268

00:59:04.280 --> 00:59:07.930

Daren Chamblee: all the videos instead of trying to do. I'm looking at doing

269

00:59:07.960 --> 00:59:12.720

Daren Chamblee: 24 next year. and they'll all be recorded in December.

270

00:59:13.030 --> 00:59:15.109

Daren Chamblee: and you know.

271

00:59:16.200 --> 00:59:21.070

Daren Chamblee: probably vanilla flavor. But at least I'm going to have some content out there.

272

00:59:21.110 --> 00:59:26.059

Daren Chamblee: And that's gonna be, I think, my approach the next time.

273

00:59:26.890 --> 00:59:35.800

Stephanie Bogan: Can I ask you a couple of questions about that, Adam. You might have some as well. You said that you tried this, and you tried this, and you tried that. How long has the tried happen? Up to this point?

274

00:59:35.960 --> 00:59:41.680

Daren Chamblee: I did like a monthly. Podcast and I got about 8 episodes of it done

275



00:59:42.070 --> 00:59:47.409

Daren Chamblee: videos. I was trying to do this little financial minute, and I tried to do it every week.

276

00:59:47.690 --> 00:59:48.410

and

277

00:59:48.670 --> 00:59:55.189

Daren Chamblee: I just couldn't pull it off because I was trying to do it on, you know, Saturdays, and I was just been in too many hours with it.

278

00:59:55.450 --> 00:59:57.879

Daren Chamblee: and so

279

00:59:58.030 --> 01:00:03.630

Daren Chamblee: it it lasted. Probably I don't know. 3 months, and I crashed and burned.

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01:00:05.310 --> 01:00:07.539

Stephanie Bogan: So what do you guys notice about that?

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01:00:12.410 --> 01:00:13.899

Stephanie Bogan: Anyone? Anything

282

01:00:14.990 --> 01:00:17.560

Michael French: too much too fast?

283

01:00:17.780 --> 01:00:43.760

Stephanie Bogan: Yeah, there is this whole like who it's so sexy. And I'm going to do this. And I'm going to do this. And hey, it hasn't worked after 8 months and 8 months. By the way, is a pretty good period of time to get traction. But when you're doing something on a monthly basis that's very different than doing it on a weekly or a bi weekly basis for 8 months, right? So the ability to create momentum on something monthly, it's just going to be a lot slower. And as you think about the other things that you've tried.

284

01:00:43.930 --> 01:00:57.410

Stephanie Bogan: what tends to happen is we get really excited. We expand some effort. We don't get the nearly immediate response result that we want. We conclude that it doesn't work. We set it aside and we go chasing after the next big idea.

285

01:00:58.040 --> 01:01:07.839

Stephanie Bogan: Darren, did you stop? Did you stop it because you felt like it was too much friction to create? Or did you stop it because you weren't getting the traction that you wanted in eyeballs or listenership.

286

01:01:08.000 --> 01:01:15.600

Daren Chamblee: I think it was probably too much friction to create. It was my!

287

01:01:15.940 --> 01:01:22.549

Daren Chamblee: I tried to do it too perfect number one, you know, with Logos and everything, as far as the videos, and



288

01:01:22.930 --> 01:01:34.880

Daren Chamblee: you know it. So my next round will be, I'm gonna delegate at all other than, as I say, were you doing the Logos? Yes, I did. I did it all, and it was just.

289

01:01:35.190 --> 01:01:59.909

Daren Chamblee: you know, with couple of 100 clients. It was a difficult thing to do, and I was, gonna say, we've had a number of conversations, my friend, you have just a just a few things on your plate, as it pertains to client service and helping any succession of an untimely partnership due to the loss of a like yeah. What the hell are you doing doing this yourself? Well, that was that was actually before we passed away 1 one of the biggest things

290

01:02:00.200 --> 01:02:01.540

Daren Chamblee: with this that

291

01:02:01.960 --> 01:02:14.220

Daren Chamblee: really drug me down. I was with with the big firm when I did. The podcast was the compliance, and it was me for them. And I was only guy. And you know, 600 advisers doing a podcast and

292

01:02:14.530 --> 01:02:19.149

Daren Chamblee: you know, I mean, they had a nervous break down a minute over it. So it was probably too soon.

293

01:02:19.430 --> 01:02:30.879

Daren Chamblee: you know. And now I don't have that issue of dealing with that being an independent, or I thank God, so I think it'll a lot of the frustrations that I had will go away.

294

01:02:31.290 --> 01:02:39.159

Daren Chamblee: you know, when you have somebody who wants you to send a script in advance. And you, you know I'm more of a spontaneous person than

295

01:02:39.270 --> 01:02:43.259

Daren Chamblee: scripting it out. Give me kind of the general topic, and let's go.

296

01:02:43.480 --> 01:02:46.209

Daren Chamblee: You know I don't really care for you know

297

01:02:46.580 --> 01:02:51.169

Daren Chamblee: me having to write down exactly what I'm going to say and regurgitate it exactly the

298

01:02:51.460 --> 01:03:04.529

Daren Chamblee: you know the same way, and somebody listening to it to make sure you did it the exact same thing. I think Kevin's bringing up a really interesting point, which is, we always talk about like you've got to be consistent. There's a certain discipline to doing it.

299

01:03:04.760 --> 01:03:22.579

Stephanie Bogan: and simultaneously, we don't necessarily want to change who we are and how we do our best work right. Some people love and need a detailed outline, and every single question. Adam and I are like, pick free things for that Combo, and let's just roll with it, and we'll end up where we need to end up.

300



01:03:22.730 --> 01:03:29.840

Stephanie Bogan: And I think that, you know, giving ourselves permission to sit in the space that we can sit in while

301

01:03:30.160 --> 01:03:39.749

Stephanie Bogan: challenging ourselves to ask ourselves, you know, is it working? Are there places where we can show up that? Are you guys are all familiar with Ben Brant, who is one of our

302

01:03:39.770 --> 01:03:58.090

Stephanie Bogan: early, limitless advisors who's gone on with great success. And he, very much like Adam, had a podcast and it wasn't producing the results that he wanted right. He did all the things we talk about, and great things happened. And then we were having one of our ongoing, coaching conversations. And he said, like my conversion rates like in the 40%. And I was like, what

303

01:03:59.560 --> 01:04:14.400

Stephanie Bogan: like for people that know you, and already like you and trust you. That's a really low number. It means that we're not filtering right or we're not, you know, focusing the message in a way to really articulate that. And so we went back and started talking about how he can

304

01:04:14.400 --> 01:04:41.830

Stephanie Bogan: do a better job of seating in his podcast right hey, this is a really important concept that we just covered. If you're right to do it yourself, investor, and you're going to be applying this on your own here a couple of things you should think about. If you already have a financial advisor. Here are the questions that they should be asking you, or that you should be asking them if they're not. And right, if you're really looking for someone to provide advice, right? You can always grab our website level like that was it. It went from like 40% over 70. Just with that seeding.

305

01:04:41.910 --> 01:04:56.420

Stephanie Bogan: like all we were doing is instead of adding more and more and more was getting really intentional about how to elevate our effort. So yes, I want you to think about the channels that you like that are really comfortable and more natural to you.

306

01:04:56.470 --> 01:05:05.579

Stephanie Bogan: And then, on top of that, we want to figure out how we instill the discipline to really elevate that strategy, to make the most of the time and talent that we're investing.

307

01:05:06.860 --> 01:05:16.489

Stephanie Bogan: So what are your next steps there, Kevin and I know to Adams Point. You have a lot on your plate. Right? I'm sorry, Darren. 5 letters.

308

01:05:16.950 --> 01:05:25.140

Daren Chamblee: so that's a that's a great question. So I so for me to do this, I have to write the general scripts

309

01:05:25.270 --> 01:05:27.480

Daren Chamblee: between now and November.

310

01:05:27.740 --> 01:05:36.779

Daren Chamblee: And so I'm time blocking. And and I've got a guy who's literally doing everything he's doing the videos coming in, doing the

311



01:05:36.790 --> 01:05:38.989

Daren Chamblee: everything. And

312

01:05:39.300 --> 01:05:47.779

Daren Chamblee: So the next thing for me is just the general script that I'm going to do. It's probably going to be just the financial minute.

313

01:05:48.030 --> 01:05:51.129

Daren Chamblee: you know, because

314

01:05:51.520 --> 01:05:56.479

Daren Chamblee: right now I don't have the time to really do an in-depth show. But I'd like to have

315

01:05:56.650 --> 01:06:02.859

Daren Chamblee: some video content out there. because I think it's really important. When I did do it, people noticed.

316

01:06:03.290 --> 01:06:05.869

Daren Chamblee: I I did. In a week

317

01:06:05.990 --> 01:06:08.190

Daren Chamblee: people will notice if you do a video.

318

01:06:08.360 --> 01:06:13.790

Daren Chamblee: even if it's bad. And I did plenty of bad ones. So actually, all of mine were bad. So.

319

01:06:13.920 --> 01:06:20.049

Daren Chamblee: But but people noticed, and it really surprised me that somebody would say.

320

01:06:20.280 --> 01:06:21.080

Daren Chamblee: You know.

321

01:06:21.340 --> 01:06:41.559

Daren Chamblee: hey, I saw somebody's Facebook. They shared your video, you know, and I'm like what you know. And they wouldn't be a client that they just stuck it on there. Well, notice the judgment that we impose on ourselves. It's not good enough. It's not worth it. Why would anyone share it? And that again goes to that curse of knowledge. We judge ourselves by the top professional in our space

322

01:06:41.560 --> 01:06:53.280

Stephanie Bogan: that we feel like we're lacking against. And everyone else is judging us to their current knowledge level. In which case, right? Most of the time, you're going to be in a vastly better position to help them.

323

01:06:53.310 --> 01:07:18.209

Stephanie Bogan: So just understand how much your head space really shows up. When we think about choosing our channel, it makes perfect sense. Right? What's our core audience? What's our core message? What's our core channel for communicating and expanding that message? Right? How do we then circle the wagons around our marketing to leverage that channel into others like it's a very systematic system, but so much of what we push up against is our own

324



01:07:18.210 --> 01:07:33.719

Stephanie Bogan: personal and headspace resistance and time. Right? I don't have the time. I'm worried about how it goes out, like I'm not willing to invest in paying people to leverage. And I think Adam just makes a really important point. Here is, it's about creating ease and effortlessness.

325

01:07:33.830 --> 01:07:43.439

Stephanie Bogan: And anytime we attempt to do things that are not above the line. For us. It never creates ease and effortlessness. It doesn't mean it doesn't create results in economics.

326

01:07:43.980 --> 01:07:56.750

Stephanie Bogan: but it doesn't simultaneously create ease and effort. So that's where I love right watching Adam and Patrick and other advisors really figure it out, and you pick up and you fail, and you have fits and starts, but you'll definitely find that channel

327

01:07:56.840 --> 01:08:21.899

Stephanie Bogan: and or channels that really drive a pipeline, and then all of your energy and effort goes into those. And then to at this point, you're just right adding around the edges and translating. Now we're going to turn into a log. Now we're going to turn it into something else. it doesn't have to be perfect. I think Adam talked about that like Adam, if we go back and look at your first, podcast your first speaking engagements, your first articles

328

01:08:21.979 --> 01:08:25.830

Stephanie Bogan: like, Would you be like, wow, this was so awesome.

329

01:08:26.040 --> 01:08:32.219

Adam Cmejla, CFP®: I mean, I am pretty good. So they are. They were really getting on. I'm kidding. Obviously.

330

01:08:32.960 --> 01:08:34.229

Adam Cmejla, CFP®: no, I

331

01:08:34.490 --> 01:08:44.210

Adam Cmejla, CFP®: yeah, it it. It's an iteration. And the goal is progress over perfection. Right? It's it's get to that Mvp,

332

01:08:45.359 --> 01:08:50.669

Adam Cmejla, CFP®: and like the other thing that is hard to.

333

01:08:51.170 --> 01:09:01.140

Adam Cmejla, CFP®: it's hard for some people to understand. But I truly believe that everybody everybody attending today's call would be would share the same sentiment.

334

01:09:01.399 --> 01:09:10.930

Adam Cmejla, CFP®: I'll get asked by advisors that'll listen to the show, and we'll say, How how do you? How do you ask really good questions? How do you know how to do that? And and I say, I don't really know.

335

01:09:11.000 --> 01:09:20.750

Adam Cmejla, CFP®: But the snarky answer is, I I truly give a shit like server language, but I like that's my answer. It's like I am genuinely, truly interested.

336



01:09:21.080 --> 01:09:23.389  
Adam Cmejla, CFP®: and what the guest has to say.

337

01:09:23.680 --> 01:09:52.540  
Adam Cmejla, CFP®: and it doesn't have to be anything more than that the your authentic self will come out. You don't have to worry about being a second version, a second-rate version of someone else. If you just be the best first-rate version of yourself, and that if you genuinely are curious. And again, I'm talking through the filter of of interviewing from a podcast but whether you're interviewing for a podcast or I promise, if we ask stuff to give a presentation on something that she just didn't really care at all.

338

01:09:52.620 --> 01:09:54.870  
Adam Cmejla, CFP®: Could she muster it up and

339

01:09:55.170 --> 01:10:19.700  
Adam Cmejla, CFP®: pretend? Yeah, but it's still not gonna her. Her her best second rate version still isn't going to be as good as the first rate version of what she is genuinely and authentically passionate about. So all that to say don't think that what you're producing in the beginning is that bad? Because if you genuinely do care about it, and you enjoy the act of whatever modality you're presenting on, it's probably pretty good.

340

01:10:19.910 --> 01:10:20.740  
Stephanie Bogan: Yeah.

341

01:10:26.160 --> 01:10:27.730  
Stephanie Bogan: I'm just looking.

342

01:10:28.320 --> 01:10:52.609  
Matthew Benson: I have a question. we've done like for a year and a half. We've done a monthly blog, and I'm on the newsletter and it. But I feel like like listening to Adam Dan Taylor. Like, I, I feel like inevitably, I would move towards podcasting at some point, just because again, just because I've seen their success with it.

343

01:10:54.140 --> 01:11:04.680  
Matthew Benson: at what point do you like? Yeah, see? How do you know if it makes sense for you. I I guess in my head I kind of look, and I go. Hey, we've got a year and a half of writing a blog and a newsletter every month.

344

01:11:04.780 --> 01:11:11.110  
Matthew Benson: I've got 30 podcasting topics. I could just turn all these blogs into, podcast not all of them, but some of them.

345

01:11:12.420 --> 01:11:14.320  
Matthew Benson: Is that a question?

346

01:11:14.620 --> 01:11:15.630  
Adam Cmejla, CFP®: Not really.

347

01:11:15.840 --> 01:11:22.170  
Adam Cmejla, CFP®: I mean. So let me rephrase. Yes, you asked a question. The answer is going to be snarky.

348

01:11:22.410 --> 01:11:25.710



Adam Cmejla, CFP®: It will turn into a podcast when you want to turn it into a podcast

349

01:11:26.990 --> 01:11:40.080

Adam Cmejla, CFP®: you have to want to do it first. And if you want to do it. Then go. because again, kind of going back to what I said earlier, you can't help but be successful if you a given enough time and be nurtured.

350

01:11:40.710 --> 01:12:03.169

Adam Cmejla, CFP®: So that would be the first question that I would ask you to sit with is, Do I really want to do this as a? Podcast or do I feel like, I have to do this as a podcast. Because I've seen Adam and Taylor and Ben and Jeff rose and Patrick's create his Youtube channel. And there's this feel of Fomo that you have to do. You don't have to do that. A lot of advisors have built, I mean

351

01:12:03.420 --> 01:12:05.820

Adam Cmejla, CFP®: Taylor's website was

352

01:12:06.580 --> 01:12:19.839

Adam Cmejla, CFP®: popular even before his podcast. Because of how much he genuinely cares about SEO and design. I mean Taylor's get. Taylor kids offers. I don't know about a monthly basis, but a couple of times per year. 6 figures

353

01:12:19.850 --> 01:12:30.519

Adam Cmejla, CFP®: for his domain name because of the traffic that he has, but he genuinely cares about. That. Does that mean that because Taylor did that, that I or any one of us should go become stewards of.

354

01:12:30.560 --> 01:12:41.489

Adam Cmejla, CFP®: you know, website, design and layout and everything like, no, we don't have to do that. That's my long, somewhat snarky answer to your question. Do you want to do it?

355

01:12:42.150 --> 01:12:42.840

Matthew Benson: Yeah.

356

01:12:43.410 --> 01:12:44.180

Daren Chamblee: so.

357

01:12:44.490 --> 01:12:59.660

Stephanie Bogan: And if the thing is what what tends to stop us is right. What's happening in our head space? Or we think, Oh, often it's that's already being done. There are a grand total of 70 advisor podcasts as of 2023.

358

01:13:00.110 --> 01:13:10.119

Stephanie Bogan: And if we go and look in the data on on those right, Adam, what's the percentage of podcast that what you were talking earlier, that have done an episode. So of those 70, I promise you

359

01:13:10.220 --> 01:13:25.109

Stephanie Bogan: right, if I dig into the stats, not all 70. You're active with a 3 plus year runway. Half of those are going to be right, inconsistent, or outdated. So those are the right marginally active ones. There are so many opportunities. So yeah, Youtube can be or

360

01:13:25.310 --> 01:13:49.949



Stephanie Bogan: podcast or Youtube or anything else. There is unlimited opportunity to Adam's point. It can't just be a thing that we chase because somebody else did it. That's a great reason to be like, oh, I want to look at podcasting and see if it would be a good way to translate the work and the content we're doing into a different audience like that's a great conversation to have. It's really about, will you make a sustained commitment to that effort?

361

01:13:50.880 --> 01:13:52.110

Daren Chamblee: Quick question.

362

01:13:53.020 --> 01:14:00.889

Daren Chamblee: what what are you guys doing? What did you do to market? The podcast is doing it.

363

01:14:01.350 --> 01:14:12.890

Daren Chamblee: And I think you know a lot of things that I've heard a lot of people say, is, you know, we're, you're doing these podcast and you got 0. And then some people just accelerate, and you know

364

01:14:13.770 --> 01:14:21.880

Daren Chamblee: they go to the stratosphere with it. So they obviously know something that everybody else doesn't know is as a way to market what they're doing.

365

01:14:22.840 --> 01:14:27.960

Adam Cmejla, CFP®: You're not gonna like my, well, actually, you you should actually really like my answer. Nothing.

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01:14:29.440 --> 01:14:35.040

Adam Cmejla, CFP®: I did absolutely 0 concerted intentional

367

01:14:35.240 --> 01:14:38.310

Adam Cmejla, CFP®: podcast advertising or podcast marketing.

368

01:14:38.370 --> 01:14:51.860

Daren Chamblee: And to this day all people that you were you just told people, you had a podcast when you incorrect. Let me show you. This is the closest thing that I've ever, and I have one handy right here. This is the closest thing that I've ever done to any type of

369

01:14:51.930 --> 01:14:57.469

Adam Cmejla, CFP®: podcast marketing directly related. When I go to optometry shows, I don't bring business cards.

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01:14:57.490 --> 01:14:58.750

Adam Cmejla, CFP®: I bring this little guy.

371

01:14:58.920 --> 01:15:22.019

Adam Cmejla, CFP®: It's a, it's a business card and on the back of it, and I'll update these because A, that photo is just embarrassingly old and B I put QR codes on the back to 4 different podcast platforms. I now use a a platform called Link tree. So on the one link tree. So I put one QR code to the link tree, and then that will take. I can be dynamic with the with the

372

01:15:22.210 --> 01:15:35.440

Daren Chamblee: links that I put on link tree. Obviously, these are only to the podcast platforms of whatever spotify itunes, stitching and Google play. So I've never a thousand dollars a month to Facebook to get, you know.



373

01:15:36.560 --> 01:15:43.099

last time I had checked. And this is from podcast movement. And admittedly, this, that was a couple of years old.

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01:15:43.400 --> 01:15:49.539

Daren Chamblee: converting podcast listeners via Facebook ad does not work very well.

375

01:15:52.190 --> 01:15:55.779

Adam Cmejla, CFP®: Now, what you could do is if you had some type of deliverable

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01:15:55.960 --> 01:16:06.940

Adam Cmejla, CFP®: that you are offering, you could, hey, here's a my top, my ultimate financial tool kit for insert, niche, avatar.

377

01:16:07.010 --> 01:16:33.009

Adam Cmejla, CFP®: And then once they click on that podcast. Or once they click on that Facebook ad to then download the toolkit part of your. Thank you. Message would be a link to hey, if you're interested in this ultimate financial toolkit. You might be interested in subscribing to our podcast that we have titled best financial, podcast for niche, avatar, and then create either a QR code or a one click link that will allow them to subscribe on whatever platform.

378

01:16:33.200 --> 01:16:33.900

Daren Chamblee: Okay.

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01:16:35.000 --> 01:16:53.719

Adam Cmejla, CFP®: But converting Facebook to podcast listeners. Again, if that data has changed, it has changed within the last couple of years, but left. I had looked in that because I was down the same road. I was going to spend a couple of \$1,000 on paid Facebook. Let unpaid Facebook leads. talking to Roger. Roger.

380

01:16:53.900 --> 01:17:02.870

Adam Cmejla, CFP®: Roger Whitney, using my, who is in my mastermind group, who's got a very long timeline and a lot of experience. He tried it. It just didn't work.

381

01:17:03.480 --> 01:17:09.209

Daren Chamblee: thank you and and others like I didn't do it just based off of him. It was he corroborated the research that was out there.

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01:17:11.570 --> 01:17:17.660

Matthew Benson: And when you bring on a guest, on your, on your podcast or you. I'm thinking.

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01:17:18.220 --> 01:17:30.430

Matthew Benson: how big of a network does this person have for distribution to grow the podcast base? So like, do they also podcast or you just? Are you more concerned of is this, gonna have to create good content for my active base. Bingo.

384

01:17:30.680 --> 01:17:42.129

Adam Cmejla, CFP®: I don't care. I don't give a shit. So I'm I'm bad for language today. I'm sorry I'm on. I'm unfiltered this morning a little better this afternoon. I I it's not about me.



385

01:17:42.750 --> 01:17:45.320

Matthew Benson: It's going to be valuable to the listener.

386

01:17:45.580 --> 01:17:59.829

Adam Cmejla, CFP®: That is the one and only filter that's the one and only lens that I'll put that through. Is this guess going to bring value to the listener of 2,020 money, and it and through that kind of a rhyming or or a derivative of that is.

387

01:18:00.140 --> 01:18:06.309

Adam Cmejla, CFP®: does this help. Optometrists make smart and educated decisions with their money, both personally and professionally.

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01:18:06.790 --> 01:18:15.250

Adam Cmejla, CFP®: either directly or indirectly, right? So the the, the the recording that I have come up on Wednesday about how to use AI in optometry practices.

389

01:18:15.540 --> 01:18:33.650

Adam Cmejla, CFP®: Does that directly help them make educated, informed decisions with their money? Well, no. But through the interview. I will connect the dots on. So you pay for this and that frees you up to see how many more patients per week. Oh, great! So that drives more revenue to the like. That's the iteration. That's how you but it's all through the filter of

390

01:18:33.660 --> 01:18:36.500

Adam Cmejla, CFP®: how is this in service of of my listener.

391

01:18:37.200 --> 01:19:02.350

Stephanie Bogan: And Adam has a very specific channel. And he's been really clear about this. He's really focused on driving leads through his podcast channel. And then he gets ancillary opportunities. The speaking, the writing, etc. Notice that the card that he's giving out doesn't say Join my mailing list or right contact me. It says, go to my podcast, knowing full well that 7 out of 10 people that get that card

392

01:19:02.390 --> 01:19:06.050

Stephanie Bogan: don't listen to a podcast, and so again.

393

01:19:06.050 --> 01:19:26.160

Stephanie Bogan: it's a very focused strategy, not because he couldn't be talking to all those other people, but because the way that he is chosen to drive growth is with a very scale podcast strategy, which means he can talk to a hundred or a thousand or 10,000 people at a time, build that trust, equity and relationship. Alpha.

394

01:19:26.160 --> 01:19:49.059

Stephanie Bogan: right? And if you go to the sales process, Adams evolved from like struggling and working in low conversion rates to 5 years later, literally picking up the phone having a 30 or 45 min conversation. And there's signing on the.in line the way that I do after 30 years like that's because of that trust, equity and relationship. Alpha is built up in the podcast or in the blog or in the Youtube or in the other thing.

395

01:19:49.260 --> 01:20:10.459

Stephanie Bogan: And so that is ultimately the goal is, how do you make that process more efficient because you're building trust equity so much earlier in the process that by the time they call on you they're interested, motivated, and



just want to vet you, which is entirely different than who I'm exploring this thing. So I think, Darren, for you and Matt for you.

396

01:20:10.620 --> 01:20:35.620

Stephanie Bogan: If you put your core strategy at the center of that wheel and think about how you're really going to drive it. Then, as Adam pointed out, you can look at how you drive other strategies. At the same time, I've done a podcast who are the who are my top 10 article, you know, contacts for writing in the space relative to my audience or niche. It's this magazine. It's this journal, right? Those are the places that I should be connecting with and promoting, sending my podcast

397

01:20:35.620 --> 01:20:41.649

Stephanie Bogan: link building relationships, hey, where the speaking opportunities, right? Now, I've got a podcast to send

398

01:20:41.650 --> 01:20:54.679

Stephanie Bogan: right, or it could be a block. So these, every conversation we're having right. Now, I want to be really clear, is it utterly interchangeable? When I say, podcast. I could just as easily be talking about Youtube or a Coi strategy.

399

01:20:54.710 --> 01:21:16.260

Stephanie Bogan: It's really about, how do we define our channel and build distribution around a primary channel with sub channels that support that so that we can focus our energy and efforts. If Adam had a conversation with everyone that ran through a conference he might still grow. But I don't think he would grow as efficiently because he'd spend

400

01:21:16.290 --> 01:21:33.399

Stephanie Bogan: right an hour and a half on the phone with those people, and you'd have a lower conversion rate. So by giving up some people with a very focused strategy, here's my card. If you have a pot. You know, if you're interested in podcasts, what he's doing is he's aligning his growth, energy, effort and economics, time and capital

401

01:21:33.530 --> 01:21:53.970

Stephanie Bogan: with the audience and the channel that he's chosen so that he can have the highest efficacy and impact within that channel. And again, it plays off into other areas. But that's very different than I'll do a podcast and I'll do Youtube. And I'll do cois. And I'll do this and just hope that the mishmash gets me the growth that I want.

402

01:21:54.380 --> 01:21:55.990

Stephanie Bogan: Does that help a little bit.

403

01:21:59.620 --> 01:22:05.020

Stephanie Bogan: Jeff? How about you? I see you nodding a lot today, Danielle Scott, do you guys have Danny any questions.

404

01:22:08.170 --> 01:22:14.639

Stephanie Bogan: Are you clear on your primary channels? Does anyone have questions about which channel they want to focus on and how they want to double down?

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01:22:17.400 --> 01:22:23.670

Scott Floersheim: I have a question, Stephanie. That's a little bit tangible to it. But

406



01:22:24.040 --> 01:22:29.650

Scott Floersheim: I just wonder, as you as you're putting out a lot of this free advice.

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01:22:29.700 --> 01:22:39.229

Scott Floersheim: How you qualify that? What disclosures do you do to keep people from trying to do it themselves, or take? They take the responsibility of doing it themselves.

408

01:22:39.280 --> 01:22:48.930

Scott Floersheim: is that something we go over with our compliance person. But you know, if you're doing Youtube, do you? You put something on there, do you, you know, does that make sense?

409

01:22:48.950 --> 01:22:53.209

Stephanie Bogan: Yeah, it's a great question, Adam, what do you do with the podcast? Patrick, what do you do with Youtube?

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01:22:53.450 --> 01:23:01.889

Adam Cmejla, CFP®: The more you give away, the more like I don't I? This sounds

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01:23:03.750 --> 01:23:16.840

Adam Cmejla, CFP®: on the surface. It could sound like it's trickery, or like it's a bait and switch, or anything like that. But it's not. What I have found is that the more you give away, the more you actually see doubt in their mind that they might be missing something.

412

01:23:18.880 --> 01:23:23.010

Scott Floersheim: I I don't disagree from a marketing standpoint, I'm thinking, from

413

01:23:23.080 --> 01:23:37.000

Adam Cmejla, CFP®: litigation, avoidance standpoint. If they take and run what you've said and try to do it themselves

414

01:23:37.210 --> 01:23:49.479

Adam Cmejla, CFP®: again. I I'm it comes through practice. And I've seen this in chat where someone had said, the difference between us and others is that we just hits. We just hit record and just started. And then it's iteration improvements on that. That is true. And one of the things that I've

415

01:23:49.540 --> 01:23:51.700

Adam Cmejla, CFP®: a skill that I have. Home is

416

01:23:51.710 --> 01:24:17.609

Adam Cmejla, CFP®: being able to listen to myself as I'm talking and interviewing like. If I sense that the conversation is getting pretty specific. I'll actually insert a disclaimer in a somewhat joking manner. In the podcast episode, like okay, we're getting pretty detailed here. Let's just remind everybody, don't make this don't make life changing decisions based up at 2 guys or a guy in a gal's podcast that you listen to and the disclosures at the end of every podcast to me, candidly, that's that's low hanging fruit, head trash. That's easily able to just be

417

01:24:17.740 --> 01:24:18.670

Adam Cmejla, CFP®: whatever

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01:24:21.880 --> 01:24:25.570

Stephanie Bogan: yeah, Patrick, anything that you do from a video standpoint

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01:24:26.810 --> 01:24:53.459

Patrick King: I have disclosures in the show notes. I used to put them at the end of the videos. But, I don't. I don't even do that anymore. So I typically do my videos as examples. you know, for you know, a hypothetical person in this situation might want to look at this. And so it's all about the importance of the language that you use and then have the disclosure. I also have all the Youtube stuff and a separate Lc.

420

01:24:53.460 --> 01:25:06.909

Patrick King: and it's listed as an outside business activity on my ad. So that's a little bit more helpful as far as like the 80 V side of things go. But as always, you know, check with your compliance, officer.

421

01:25:08.160 --> 01:25:23.669

Stephanie Bogan: Yeah, you're just gonna want to make the disclosures appropriately in any format. And then to Adams Point, when you're getting into specific strategies, one you want to make that claim. But 2, you're also always trying to, as we talked about earlier with that seating really

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01:25:23.940 --> 01:25:52.519

Stephanie Bogan: set people up to really be clear on how they are best positioned to execute, hey? If you so, I love calling it out, hey? If you're a Diy investor, and you're thinking about executing on on your own. Understand that this is right. 2 guys talking about X, Y or Z, and we're talking as specifically as we can while still keeping it. General, there are lots of right caveats and characteristics that would make it wildly different for any situation. It's really important to seek right personalized financial advice when you're making decisions like this

423

01:25:52.520 --> 01:26:09.349

Stephanie Bogan: greater, to make sure that you have the ability to get the technical information you need to make sure that you're addressing taxes. And this, and then they're like, Oh, my God, that's that. And some people, by the way, will go do it. And that's okay. They're not your people. It's all right. You want to empower them right through the lens of compliance.

424

01:26:09.620 --> 01:26:29.880

Stephanie Bogan: and then speak to the people who don't want to do those things right. Some of you are. Gonna implement these ideas on your own or with advisors that you have. That's great. We encourage you to think about this and this, and this, and ask these questions right for those of you that really just want to turn to a trusted advisor to solve for it. You can reach out to us for other advisors, right as it works for you. And then they're like, Oh, okay.

425

01:26:30.580 --> 01:26:45.399

Adam Cmejla, CFP®: any any final questions here? Because true to form, in 1 min, I have to hop on a podcast reporting with student loan plan or talking about the new student loan changes for optometrists in the wake of the biden administration's

426

01:26:46.520 --> 01:26:56.889

Matthew Benson: cluster. You know what of changes, litigations, lawsuits, politicking, etc. out of you. You started out doing bi-weekly. Now you do weekly.

427

01:26:57.110 --> 01:27:07.240

Matthew Benson: Now, obviously, you know, the more often you produce the better? Is it linear, or is it that? Is it exponential? Or I don't know? Can you? Can you answer that?

428



01:27:07.460 --> 01:27:21.989

Adam Cmejla, CFP®: It's a middle of the road, I would say to be mathematically, it's not truly linear. If I had to give it a slope right sloping one to one. If I had to give it a slope. Our curve started out, one to one over the slope of one, and now we're probably at a slope of

429

01:27:22.200 --> 01:27:25.380

Adam Cmejla, CFP®: 4 to 1, 3 to one like we're starting to get.

430

01:27:25.850 --> 01:27:47.979

Adam Cmejla, CFP®: But we have a very small niche. So it's not like I'm eventually gonna wake up 6 months from now, and I have a hundred 50,000 downloads per month like there's only 30,000 optometrist nationwide. So my exponential hockey stick growth will never truly show up like you would see with bigger pockets, or any one of these other that have hundreds of thousands of downloads per episode.

431

01:27:48.910 --> 01:27:49.700

Stephanie Bogan: Yeah.

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01:27:50.030 --> 01:27:59.149

Adam Cmejla, CFP®: I have the graph. And I again, not to tease it too much. But I have the graph that I'll share in the podcasting session, in in Denver, in a couple of weeks

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01:27:59.420 --> 01:28:00.839

Matthew Benson: cool, I'll be there.

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01:28:01.140 --> 01:28:01.840

Adam Cmejla, CFP®: So

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01:28:01.870 --> 01:28:16.699

Adam Cmejla, CFP®: all right, I got a jet. So thank you as always appreciate you all. We'll see you hopefully. See, the majority of you, if not all of you, in Denver in a couple of weeks.

436

01:28:16.700 --> 01:28:38.639

Stephanie Bogan: It's really about getting clear and conscious and committed to how you're going to use the content that you have. And one of the things we really wanted to accomplish today, because we tend to step over this and just start throwing a bunch of stuff against the wall is our first step is to get clear and conscious about the channels that we're choosing. Why, we're choosing them how we're going to use them.

437

01:28:38.750 --> 01:29:03.570

Stephanie Bogan: Ultimately, right? When you get to that second level right? Think your tooth you. Then you're thinking a lot more about the stacking year one. Certainly, when you're starting, pick a core primary channel that you can really invest your time, energy, and capital into. And there is again. We've got the lessons on podcasts and Youtube and different things as you want to dive into those channels. But what really helps is getting clear and focused about how you choose

438

01:29:03.570 --> 01:29:22.199

Stephanie Bogan: and how you commit your time, energy, and capital on the other side of that. So I hope today's Paul helped you guys get a little clearer about that. We thought this would be a good lesson as we drive into Growth Retreat, where we're gonna really start talking specifically about the strategies and how you implement them. With that, you guys have a great week, and we'll look forward to seeing you soon have a great one.

