

SUCCESS SHIFTER

GUIDEBOOK



How to use “Success Shifting” Strategies

TO CREATE CHANGE & ACHIEVE YOUR GOALS

In spite of big goals and the best of intentions, you may find that things tend to stay the same. You may feel that despite your best efforts you just can't seem to achieve the success (or health, wealth, and happiness) you desire. You may wonder why it isn't easier to see those goals realized, whether it be doubling the size of your already successful firm or creating much needed growth for your new one.

We have this habit of “signing up” for things but not “showing up” for them. We have mental laundry lists of things we'd like to be different, yet we go about our usual routines somehow expecting a different result. We decide to make changes in our practice, to buy that gym membership, to marketing more actively, and yet within days or weeks (if we even started), we fall comfortably back into our old “uncomfortable” routines. I'm going to share why change is so hard, and a tool you can use to make the change process easier and more effective.

Success Shifting is the process of changing and eliminating habits that compromise your success and creating new behaviors that contribute to greater success. When done consistently these behaviors form new, empowering habits that become hard wired into our brains. Yes, you really can hard wire your brain for success.

I'm going to share with you the “Success Shifter,” one of the tools we use to help advisors build wildly successful businesses and lives that they love. The Success Shifter is a simple tool, but that does not make it any less effective! It will help you identify, be aware of and change behaviors with the goal of improving your business performance and tapping into your personal potential.

HOW IT WORKS: THE MINDSET

In early childhood our brains intake and process all the information in our environment with the goal of figuring out how to survive. Through this process we develop internal representations of how the world works and how we should interact and respond. We'll call these internal representations “beliefs.” Some beliefs are empowering (“I can do anything”) and some are limiting (“I have to be (perfect, in control, performing to be good enough.”). These beliefs show up in every aspect of our lives through our daily behaviors and in turn form the basis of our personalities. The vast majority of our how we show up in the world is founded in these internal belief systems as they are the lens through which we intake, filter and respond to the external environment. One of my clients couldn't hit his next revenue goal, even though it was important to him. Within a few minutes we identified he held the limiting belief that people with money are bad. His Father insinuated that throughout his childhood with comments like “The people on that side of town are rich snobs and treat us like dirt.” Your brain learns through repetition and emotion. If you grow up regularly hearing negative statements about people with money from your primary caregiver, what belief is your subconscious most likely to form about people with money? If you grow up to believe you're not good enough, struggle with rejection or have a scarcity fear around money are you going to be clear in your value when setting your fees and confident when you quote them?



By the time we're in our mid-30's our brains and bodies have essentially memorized a set of thoughts, emotions and behaviors that are programmed into our subconscious and 95% of what we think and do is governed by this subconscious program and beliefs, which collectively create your mindset. If success is 80% mindset, which is what the latest behavioral psychology, performance science and neuroscience now say, then mastering your mindset is the single biggest thing you can do to have a bigger, better future.

The first step toward creating real change is to get off auto-pilot and raise your awareness around the thoughts, emotions and behaviors that are creating your current reality and which ones will lead to greater success and happiness.

If you want to grow faster, work with larger clients, be more organized and less overwhelmed, have a streamlined office, make more money, transition to a successor, lose those proverbial 10 pounds and haven't yet - it's not because you lack desire, it's because your brain is not fully on board.

The part of the brain that controls desire is not the same part of the brain that controls change. Thus, if you don't do the work of connecting the dots for your brain, change can be a lengthy, frustrating process and often fails or falls short.

Using the Success Shifter tool raises your awareness and re-focuses your brain on the behaviors that help or hinder so that you take different actions. Doing this repeatedly over time essentially re-wires the brain, forming new neural pathways and creating new empowering behaviors which, over time, become habits that lead to achieving the desired goals.

HOW IT WORKS: THE METHODS

Which leads to the first step in the process: defining a vision of what you want the future to look like. Once this is done, you'll break this into distinct goals. From here, you'll identify the "bite sized" activities that you will track. These activities will fall into two categories: things you want to do and things you want to stop doing. You will set a daily, weekly or monthly goal for each activity and track yourself against them.

In the example shared, you'll see areas of life listed and then 2-5 actions to improve in that area. You'll see the days of the month across the top and a box for each day of the month.

At the start of each day and again at the end of each day, review your Success Shifter briefly and imagine what you, your business and your life will be like when you achieve the goals. Then imagine what your life will be like if you do these things for a year? Imagine it as though you are already living that way now and imagine the good feelings you will feel. This process of "envisioning and emotionalizing" is like sticky glue for your brain. The more you feel something (good or bad) the more it imprints on the brain. The brain does not know the difference between what is real and what is imagined, so envisioning your desired reality (a highly profitable business, clients you love, more time off, better relationships, healthy body, etc.) creates the same biological changes in the brain as something actually taking place. You can "envision" reality in such a way that your biology (your brain, biochemistry and biological processes) becomes conditioned to it being your reality and all your subconscious resources shift focus to creating the reality you want rather than staying stuck in the one you don't. In short, you upgrade your program by giving your

brain new instructions for a bigger, better, future and – if you do so over time – it will upload and execute on those instructions.

Repetition is one of the ways the brain learns, which is why the tool is to be used daily. I've used this tool for 20 years, and whenever I'm using it (yes, sometimes I slip and get out of the habit) I'm infinitely more focused, aware and engaged and performing at a much higher level with better results.

For this tool to work you will need to:

- **Identify What Helps & Hinders.** Decide what goes on your Success Shifter by identifying a goal or goals, and then breaking that goal into the actionable behaviors that change, eliminate or create a behavior you want. For example, if you decide to commit to not discount your fees or make exceptions for clients, you might input "No Discounts/Exceptions Made" and each day you do not make that compromise, you put a check mark in the box (even on days you don't have the opportunity which still reinforces this new decision).

- **Set Realistic Goals.** Creating positive changes requires the successful repetition of behaviors. Being overly optimistic and failing at the onset will not create new results and will reinforce the current, undesirable behaviors. Start small, meet with success, then add in more frequency and/or activities. The goal here isn't to change everything now, but rather to teach yourself how to change, be successful and build from there.

- **Make the Commitment.** One of my favorite quotes is, "Dreams don't work unless you do." The Latin root of the words commitment and decision means, literally, "to cut off" as in to remove or eliminate the possibility of doing anything but what you've decided. This level of internal commitment usually comes when we reach our pain threshold (physical, emotional, financial, relational, etc.) or when major changes force us to reevaluate (sudden illness, loss of a loved one, etc.). That's not due to lack of desire, but rather to the brain's programming actively working to maintain the status quo. The first step to change is to decide that you will, no matter what. This is a key reason setting realistic goals is so important.

- **Just Show Up.** Once you've filled out your Success Shifter your job is simply to show up and do the work. Your #1 priority that day, above anything else, is to check the boxes. No need to complicate or over-think it, just commit to checking the boxes no matter what. If you said you would work out 3x a week, today is the last day of the week, you've only worked out twice and were up in the middle of the night with a sick child, remind yourself there is no debating getting up, the decision has been made. Then launch yourself out of bed with a literal 5, 4, 3, 2, 1, up. If all you do is walk around the block, do it and check the box. Don't strive for perfection, if you intended to run but got up and did 10 pushups, it counts. The value isn't in any of the individual daily activities, but in stringing them together over time. I was the example above, and I was training for an extreme half marathon in the mountains of Costa Rica. My running partners, all avid runners, gave me great advice as I tentatively began training, feeling defeated as I struggled to keep up. Their advice: Just show up. Don't think about it. Don't worry about where you are. Just show up every day, and it will happen. If you keep showing up, it can't not happen. Their advice proved to be among some of the best I've ever received, not just for running, but for life.



• **Keep it Where You can See It.** I've tried using the tool digitally, myself and with advisors, and have had far less success than printing it out and keeping it somewhere it is regularly seen. You can't raise awareness of the behaviors you want to change without something to trigger that awareness. In the computer or in a desk drawer defeats the purpose entirely. If you need to, print and put in a file folder on your desk so that it's not visible to others but you still see it and maintain awareness. When I first started using this tool I carried the folder with me throughout the day in order to maintain absolute focus on my actions each day. I tucked mine under the telephone on my desk so that it was always within view. I did not leave the office each day until I had updated my form, and the first thing I did each day was sit down, review my form, and remind myself of my commitments for the day. I added in the envisioning part years later based on the latest neuroscience research and performance psychology, and found that addition made the change process easier and faster.

Over the years, I've noticed that we all have this habit of "signing up" for things but not "showing up" for them. We have our laundry lists of things we'd like to be different, and we go about our usual routines somehow expecting a different result.

Einstein knew this to be true when he stated that "no problem can be solved with the same consciousness that created it.

The Success Shifter tool is a simple, practical way to retrain your brain and shift your consciousness into a success state, enabling you to better create the practice and life that you want.

With that, I challenge you to challenge yourself to a 30-day Success Sprint. Identify the goals you want to achieve, identify the actions that will help and hinder you, turn those into "do" and "don't" actions and use and track your progress daily as outlined. Commit to "showing up" every day for 30 days – no matter what – and see what happens. The results you experience are entirely up to you so remember: "Dreams don't work unless you do."

Here's to your success.

Steph



Success Shifter

SAMPLE



Goal	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	TTL		
SET UP FOR SUCCESS																																		
Read 1 hour per day	24																																	
Improve the firm day	1																																	
Stick to weekly calendar	20																																	
Distractions/Off schedule	0																																	
PERSONAL																																		
Hour of Exercise (3x/wk)	12																																	
Cook Dinner for family	16																																	
Weekend Socialize	2																																	
Date night with spouse	1																																	
BUSINESS IMPROVEMENT & CLIENT SERVICE																																		
Working On, Not In Business (2hrs/wk)	4																																	
Client Touch Base/Calls	10																																	
Team Professional Development Meetings	1																																	
Professional Dev/reading	12																																	
BUSINESS DEVELOPMENT																																		
Midweek Marketing	4																																	
Social Media Posts	10																																	
Blog posts	3																																	
Participate in monthly networking event	4																																	
Connect w/ external stakeholders 3x/wk	12																																	

