

LIMITLESS Coaching Call Transcript

January 8th, 2024
Leaders Kick-Off Coaching Call

33
00:07:23.570 --> 00:07:27.510
Stephanie Bogan: Welcome, everyone. Ted. Nice to see you.

34
00:07:29.610 --> 00:07:33.769
Stephanie Bogan: Robert. Hello. Ron, hey, Chris

35
00:07:37.710 --> 00:07:40.169
Stephanie Bogan: Kevin and Company.

36
00:07:40.320 --> 00:07:53.270
Stephanie Bogan: which one? It. Just raise your hand if you're Kevin. Alright, just just so we can put a face to a name. Alright. let's see we've got a few more. Let me open my screen here.

37
00:07:53.430 --> 00:07:57.660
Stephanie Bogan: There's Robert and Laura and Lianna. Hey, Liana

38
00:07:57.720 --> 00:08:15.030
Stephanie Bogan: and Mark, Mark, are you there? Or is it just your stunning photo? Hello. yeah, we don't do a lot of pictures and leaders. We allow a little bit of that at lifestyle, just cause there is a hundred 50 people, and I can't catch em all in the back, but not in leaders. No place to hide

39
00:08:15.240 --> 00:08:18.010
kevin: which you're gonna come to love and hate.

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00:08:18.030 --> 00:08:20.280
Stephanie Bogan: I mean that with all love, hey, Travis?

41
00:08:21.700 --> 00:08:25.510
Stephanie Bogan: Alright! We've got to just give it another minute for a couple of more people to join.

42
00:08:26.830 --> 00:08:30.120
kevin: And, Stephanie, so we unmute or mute

43
00:08:30.440 --> 00:08:44.469
Stephanie Bogan: you can unmute. This is leaders usually has between 10 and 15 people. So it's some,



you know. In the summer we'll have a fewer, a few less. So we'll typically have between 15 and 20 in total with Co members and whatnot. So

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00:08:44.550 --> 00:08:47.170

Sara Stanich: hey, Sarah, how are you? Good?

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00:08:47.360 --> 00:08:59.989

Stephanie Bogan: Yeah, if you we are just assuming that you're all adulting here and leaders, and that you can turn off your phone or your background, or whatever and right. We don't have to listen to your conversation with your spouse about the groceries, but if so, Alison will meet you.

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00:09:00.020 --> 00:09:12.570

Stephanie Bogan: We're happy to help if we need to. Alright, let's see who 1, 2, 3, 4, 5, 6, 6, 8. Hey, Lexus.

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00:09:16.080 --> 00:09:18.310

Stephanie Bogan: you get. Can we see you soon?

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00:09:22.590 --> 00:09:24.570

Stephanie Bogan: And wf, a. Are you there?

49

00:09:27.480 --> 00:09:30.639

Stephanie Bogan: We wanna see your bright, shiny, smiley faces today.

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00:09:32.690 --> 00:09:49.669

WFA: We're gonna turn video on soon, Stephanie. We just we're running like crazy animals around here today, which is for good reasons. But we're just fishing our lunch. No, okay, no worries. We'll allow a short reprieve for sustenance. That's fine.

51

00:09:49.860 --> 00:09:59.719

WFA: Yes, we literally have not taken a break, we rolling right into this, but we're here, and we're we're tuned in, and we've already we should start by taking a very deep breath.

52

00:10:00.390 --> 00:10:28.650

WFA: Sometimes our calls will feel like a hard stop in the middle of your right, running down the race, track it going down the racetrack at 80 miles an hour, and our brains keep on going, and it's kind of like a a thought concussion

53

00:10:28.650 --> 00:10:35.409

WFA: like through the end of the year. And it is just like it's come. It's my first day back in the office, and there's almost

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00:10:35.460 --> 00:10:43.970

there's 2 I can't. I wouldn't be able to do it this week. And so I'm like, almost in paralyzed on what I need



to do next. I was like, just get on the call.

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00:10:44.080 --> 00:10:49.070

WFA: breathe and breathe. You're gonna learn. You're gonna hear me say this a lot

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00:10:49.320 --> 00:10:55.119

Stephanie Bogan: in different ways this year, but the answer to everything, first and foremost, is breathe

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00:10:56.110 --> 00:11:16.660

Stephanie Bogan: because it turns the oxygen on, on our brain. It turns the logical, critical thinking capacity back on it puts us in the best situation and make clear conscious line decisions. It turns our body right. It puts our body back in an empowered clear stick. It does. We'll talk a lot about like the breath is literally the most important is the source of life. Without it we really struggle.

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00:11:16.690 --> 00:11:42.590

Stephanie Bogan: Obviously, right, it gets really hard, really quickly, without it. Interesting random fact. And then we'll kick off the official part of today's program you'll hear it in one of our lessons. But this is what we love about mindset and methods like, if we're not our best, we're not. Gonna make our best decisions, be a best leader, be our best advisor. We are all for the most part officially hyper, ventilating every day.

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00:11:43.380 --> 00:11:51.050

Mark Wade: so I think they they qualify hyperventilating as having 17 or more short breaths within a minute.

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00:11:51.150 --> 00:12:04.189

Stephanie Bogan: Now think about your breath coming into this call. Is it deep? Is it grounding in your belly? Do you feel in your body and relaxed? Or right? Are we like we're gonna hit the brakes. It's gonna be a hard stop.

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00:12:04.270 --> 00:12:10.160

Stephanie Bogan: right? And our brain literally like a mental concussion like wax into our head. And our body

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00:12:10.290 --> 00:12:16.509

Stephanie Bogan: holds on to that fight or flight. Go, go go feeling or state.

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00:12:16.880 --> 00:12:28.529

Stephanie Bogan: And then we get this thing I call incongruence because we're trying to be clear and present up here, and our body is still in like freaked out hyper. I got a bunch of stuff to do, mode. I can't be paying attention right now, what are you talking about?

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00:12:29.000 --> 00:12:40.649

Stephanie Bogan: And we don't stop to reconcile those 2 sides of our our being in that moment. And so we really, I'm saying this and sharing it because we all do it. I catch myself doing it.



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00:12:40.660 --> 00:13:00.880

Stephanie Bogan: The trick is to learn right, to start, to be aware and stop, because the second that we do. You're gonna this is gonna be magical. We're going to feel better. So we're actually gonna use this as one of those in practice lessons right? We get so much out of calls, and it's often not a step on the agenda. I want everyone to put one hand on your chest.

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00:13:01.980 --> 00:13:21.170

Stephanie Bogan: and another hand like on your belly, like right above your belly button. and we're going to practice what I call baby breathing or Buddha breathing. But it's the official term is diaphragmatic breath, and what it means is because we tend to breathe shallow. Those shallow breaths stop right about here in our lungs.

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00:13:21.200 --> 00:13:27.870

Stephanie Bogan: where the least oxygen rich air is, and we do that a lot because we need more oxygen.

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00:13:27.910 --> 00:13:39.239

Stephanie Bogan: the richest oxygen, the stuff that's the best for our brain or prefrontal cortex. Our logical thinking solve problem center. Be happy plan. Life center runs on oxygen and blood

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00:13:39.510 --> 00:13:50.229

Stephanie Bogan: when we stress out and we panic where we just get in that worldly, durbish mode. The blood blood leaves right? Cause it's in stress mode, and it goes to our heart muscles because things we gotta fight or run away.

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00:13:50.730 --> 00:13:54.760

Stephanie Bogan: And that's why we feel like. So on edge.

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00:13:54.970 --> 00:14:09.099

Stephanie Bogan: The deep, rich oxygen in the bottom of our belly hyper oxygenates our brain relative to the shallow. So when we breathe and we get that deep oxygen. we're you're gonna feel radically different. So the trick is to breathe in through your nose

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00:14:09.860 --> 00:14:20.289

Stephanie Bogan: through your lungs into your belly, and to relax your stomach muscles so that your belly actually expands out like a balloon or a baby or a Buddha.

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00:14:20.980 --> 00:14:29.010

Stephanie Bogan: and if you watch a baby when it breeze, if you lay it on a changing table and watch it, the baby's chest will not rise.

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00:14:29.210 --> 00:14:34.730

Stephanie Bogan: the belly will rise over and over because babies naturally breathe that way.



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00:14:34.860 --> 00:14:37.690

AlexisHuntley: Do you know, when we stop breathing that way.

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00:14:37.980 --> 00:14:39.290

Stephanie Bogan: any guesses

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00:14:42.560 --> 00:14:44.369

Stephanie Bogan: about the age of 5,

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00:14:44.700 --> 00:14:49.349

Stephanie Bogan: and he guesses as to what happens at the age of 5 that impedes our breathing.

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00:14:51.520 --> 00:14:53.999

Stephanie Bogan: There's this thing called kindergarten.

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00:14:54.190 --> 00:15:00.240

AlexisHuntley: and they have us in chairs. A lot of the time, and when we sit in a chair we tend to lean forward

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00:15:00.690 --> 00:15:18.220

Stephanie Bogan: and we constrict our diaphragm, and we breathe slow, shallow breaths. We literally like biologically, change our breathing pattern. So our job as adults is to baby Breath, or I like to call it Buddha breath, because I just think about the Buddha with big ground belly, but he's always happy.

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00:15:19.250 --> 00:15:29.200

WFA: and Harvard's done a lot of Harvard Mind Body Institute has done a lot of research around the the breath is what connect body in mind.

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00:15:29.370 --> 00:15:46.600

Stephanie Bogan: So when we have a thought, it shows up in our body in a state right cause. The thought always precedes the feeling, and we try to change her thought. But now our body is stuck in anxiety or stress. And so, even though we're logical. And we're like, Hey, it's gonna be okay, or I'll figure it out. Notice that doesn't always work. Your body's like. But I feel bad.

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00:15:47.080 --> 00:15:56.619

Stephanie Bogan: So we need to connect the mind and body so they can be in a right, a coexisting state in harmony. And the turns out the breath is the antidote.

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00:15:56.770 --> 00:16:03.690

Stephanie Bogan: So we're gonna put one hand on our chest. That was more than you ever planned to about breathing lesson value at a charge here at limitless

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00:16:03.780 --> 00:16:05.439



Stephanie Bogan: one hand on your belly.

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00:16:05.990 --> 00:16:28.190

Stephanie Bogan: and we're going to breathe deep into our belly. Here's how you know you're doing it correctly. The hand on your chest doesn't rise. So you're gonna literally breathe past. It's gonna feel like you're breathing past your lungs into your belly until your belly expands fully. We're gonna do that to the count of 4, and then we're gonna breathe out to the count of 4. We're gonna do that 3, 4, 5 times, you ready?

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00:16:29.080 --> 00:16:37.100

Stephanie Bogan: Alright! Breathe in deep hands. Stay still! 1, 2, 3, 4. Hold it for a second.

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00:16:37.250 --> 00:16:39.769

Stephanie Bogan: Feel that big extended belly out.

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00:16:39.870 --> 00:16:42.669

Stephanie Bogan: 2, 3, 4.

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00:16:43.280 --> 00:16:48.510

Stephanie Bogan: Do it again. Are we out with our mouth or our nose. You can do out with your mouth. It's fine

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00:16:49.100 --> 00:16:55.930

Stephanie Bogan: in 2. You can close your eyes if it helps you in 2, 3, 4.

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00:16:56.100 --> 00:16:57.400

Stephanie Bogan: Hold it a second

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00:16:57.580 --> 00:17:01.000

Stephanie Bogan: out, 2, 3, 4,

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00:17:01.460 --> 00:17:08.609

Stephanie Bogan: one more time in to 3, or hold

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00:17:09.680 --> 00:17:11.569

Stephanie Bogan: out to

97

00:17:11.700 --> 00:17:15.859

Stephanie Bogan: 3, 4. Open your eyes.

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00:17:17.099 --> 00:17:18.210

Stephanie Bogan: How do you feel



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00:17:21.170 --> 00:17:23.909

Stephanie Bogan: that was 3 deep breaths? That was it.

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00:17:24.089 --> 00:17:42.459

Stephanie Bogan: It's also a variation on what the Navy seals. So I like to take all the awesome stuff from wherever in the world we can get it and then bring it back to all of you. So the Navy seals if you're familiar with them. They're pretty high performing and effective at what they do with right all the resources. So are they. Something called the 4 box method.

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00:17:42.550 --> 00:17:54.340

Stephanie Bogan: So you breathe in on 4 accounts you hold for 4 counts. You breathe out for 4 counts, you hold for 4 counts, and it takes you from that hyper stress state right fight or flight. I'm about to get shot and killed.

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00:17:54.380 --> 00:18:04.629

Stephanie Bogan: and it's how they bring that panic back down to a steady state. Because if you're a navy seal. Can we agree that being in panic and fight or flight and reacting is pretty much going to get you killed

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00:18:04.850 --> 00:18:09.009

Stephanie Bogan: right? I was talking with a really cool

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00:18:09.250 --> 00:18:20.039

Stephanie Bogan: coach and therapist that I've been doing some very cool research talks around which I'll share with you later this year. Do you know that the Navy seals go through 2 years of mindset training

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00:18:21.400 --> 00:18:39.090

Liana Poodiack: Co, it's cognitive right behavioral therapy they go through for 2 years because what they're essentially doing is what people are doing when they go to therapy is they're trying to deactivate that stress response. Right? People go to therapy because they have issues or problems or pain from the past trauma. I've got lots that right been to lots of therapy.

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00:18:39.280 --> 00:18:50.849

Stephanie Bogan: right? And you have a response to it that's usually not pleasant, doesn't get you the outcomes and relationships you want. So you go to figure out how to mitigate that response and come back with one that you feel is wholeer and healthier and more conscious.

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00:18:51.440 --> 00:19:16.209

Stephanie Bogan: Maybe seals are doing that. I think we can agree. The hyperst of all levels. If there is a more intense situation, I don't want that job either, but like I could not, I would I was in this meeting. I was like, wow! It'd be so cool to see that training. And she said, No, it wouldn't right. That's literally where they put you in the pool, and they have you stay in there until past the point where you should normally die, and if you panic you die right, or you go to the hospital like they literally teach you to turn that

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00:19:16.450 --> 00:19:30.040

Stephanie Bogan: offer damp. And then I was like, Yeah, I don't need to be that good. But imagine if we showed up, you know, with just everything rolled right, you know, water off a duck's back, and we kept that clear, conscious. Mind you're gonna hear me use that phrase a lot

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00:19:30.220 --> 00:19:36.650

Stephanie Bogan: as we made our choices and committed to plans of action, do we think we get a better result with more ease and joy?

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00:19:37.840 --> 00:19:41.490

Stephanie Bogan: Yeah, I think so. So the breath

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00:19:42.310 --> 00:19:47.039

Stephanie Bogan: anytime. You don't. You need the breath, you'll know. Do you know how you'll know?

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00:19:47.780 --> 00:19:50.570

Stephanie Bogan: It's very simple. You won't feel good

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00:19:51.710 --> 00:19:57.680

Stephanie Bogan: if you feel stressed out. If you feel anxious. If you feel worried, if you feel tense. stop.

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00:19:57.700 --> 00:20:07.019

Stephanie Bogan: take the breath, because that literally puts that rich oxygen back into the thinking center of your brain. It turns off your limbic system, your Cape man panic. Make it stop brain.

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00:20:07.130 --> 00:20:22.759

Stephanie Bogan: It will make it stop just usually not in the ways that we want later. So the breath is what I like to. We'll talk about this on the sixteenth, some more right? We've got our Einstein brain, the happy, logical thinking part. And we've got our Cape man brain. The emotional based in the past reactive part

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00:20:23.680 --> 00:20:27.970

Stephanie Bogan: breathing turns on Einstein, turns off caveman or cave woman.

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00:20:28.770 --> 00:20:38.289

Stephanie Bogan: So if you do that for 5 or 10 breaths, you will notice an even more elevated state if you do it for 10 min. We call that mindfulness or meditation.

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00:20:38.340 --> 00:20:50.660

Stephanie Bogan: and if you do that 10 min a day will, it can radically change your health. And well, being in really positive ways. So says all the research ever done. So we'll talk more about that. But does that feel a little bit better?

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00:20:53.500 --> 00:20:59.529

Stephanie Bogan: Sit with that for a second that feeling of calm, steady state, no panic, no chaos.



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00:21:00.840 --> 00:21:20.199

Stephanie Bogan: We control our ability to create this state, we control our ability to manage and maintain it with how we build and run our practices, which is what we're here to talk about, but how we show up as humans and leaders has a massive amount to do with the practices we build and run, and the services we deliver so hopefully, that's just a little insight into how

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00:21:20.450 --> 00:21:30.559

Stephanie Bogan: right getting grounded on ourselves and elevating our thought processes, and how we're feeling is going to put us in a better position to make more of this program, to look, to hear what we need to hear today.

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00:21:30.570 --> 00:21:45.459

Stephanie Bogan: and ultimately to maintain that what we call success state empowered clear, calm, right anywhere from calm and cool to passionate and excited, but it's above the positive energy line, not in the negative energy line, which we'll talk more about.

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00:21:46.730 --> 00:21:48.710

Stephanie Bogan: All right, everyone ready to kick off

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00:21:49.690 --> 00:22:02.509

Stephanie Bogan: awesome. Alright. I am Stephanie Bogan. I am your cruise director for the next 12 months, as we sail this ship called Limitless. I guess they should use a mountain theme that would be so much better given that we're all about to crushing the climb.

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00:22:02.690 --> 00:22:13.360

Stephanie Bogan: I'm your tour guide or your hiking guide for the next 12 months, as it will be as we really do, try to crush our climb. I often use the example of climbing Mount Everest

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00:22:13.400 --> 00:22:42.860

Stephanie Bogan: right? Not necessarily literally, but a lot of times the goals that we have, the gap that we wanna fill feels like that big, crushing climb. And it's so overwhelming that we don't stop, or we really go much slower than we need to. Limitless is really about us, all clipping in together, going up the mountain with guides that have been there and done that it doesn't mean it's not without work or danger. In that example. It just means right that you have the most efficient, effective, enjoyable in the case of an actual mountain, safe

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00:22:43.190 --> 00:22:49.170

Stephanie Bogan: path that you can. And that's what limitless is really about. You'll also, as we've talked about have the ability to kind of right.

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00:22:49.410 --> 00:23:06.600

Stephanie Bogan: hike off on a different trail and choose your own adventure. Right in terms of leaders is much more personalized and customized, and you get a lot more support on top of that lifestyle program. So we can really dig in and talk through your strategy and design and developing solutions, and how you apply the priorities that you focus on this year.



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00:23:06.890 --> 00:23:18.399

Stephanie Bogan: So that's me. That's what we're here to help you do all of that in a nutshell is, I am Stephanie, and I am a high performance business coach. That's gonna help you elevate your work, your wealth and your wellbeing this year.

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00:23:18.590 --> 00:23:20.160

Stephanie Bogan: if you're into that sort of thing.

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00:23:20.930 --> 00:23:40.010

Stephanie Bogan: and I'm guessing that you are, you wouldn't be here. So let's take just a couple of minutes to go around and introduce ourselves, cause you're gonna get to know the folks on this group. Very well this year. I don't know if you see each other in the same order that I see you but let's do Ed Chris and Ron, and then Kevin, Laura, and Leanne, and then we'll

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00:23:40.250 --> 00:23:42.249

Stephanie Bogan: break, and then I'll direct you again.

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00:23:43.780 --> 00:23:58.959

Ed Woehlcke: Hi! My name is Ed Wolkey. Kevin Mcgary, who's on this call as well. Him and I are partners. We've gone with Stephanie's program in the past. When we first got started, we bought a practice about 7 years ago, and

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00:23:58.990 --> 00:24:06.810

Ed Woehlcke: up near the 1.7 million dollar range in revenue right now we're just trying to continue to grow. And Stephanie is a great coach.

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00:24:07.600 --> 00:24:10.310

Stephanie Bogan: Thanks, Ed, appreciate it. Glad to have you back this year.

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00:24:10.690 --> 00:24:12.600

Ed Woehlcke: Thank you. Chris.

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00:24:13.380 --> 00:24:29.000

Chris Wedell: Hello, everyone I am Chris Wouldell. I have offices in St. Louis and Birmingham. I split time between those 2 cities which are not close to one another. But my partner, Laura, who's on the call

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00:24:29.080 --> 00:24:39.040

Chris Wedell: is out in Birmingham, and my husband and my bonus children are in Birmingham, and me and my sons are here in Saint Louis.

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00:24:39.140 --> 00:24:45.820

Chris Wedell: so have about a hundred 1 million dollars in assets under management, and Laura and I are trying to figure out



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00:24:46.130 --> 00:24:59.360

Chris Wedell: practice efficiencies. We partnered about a little over a year ago. And with my time being split between 2 geographies and life just generally being a little chaotic. I'm trying to figure out how to

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00:24:59.620 --> 00:25:11.859

Chris Wedell: grow from here without sacrificing the time that I already do set aside to see my family. So it's gonna be interesting. So well, Ron, tell us a little bit about yourself.

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00:25:12.850 --> 00:25:24.129

Ron Sanders: Ron Sanders, my firm's one advisory partners. We're in the Kansas City area. So, Chris, just down the road from you, and facing a pretty decent snowstorm here as we speak right now.

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00:25:24.320 --> 00:25:41.629

Ron Sanders: So the only ra here we work primarily with with attorneys. That's a niche that we like to say we did not seek out one that was thrust upon us because there was only people that would talk to us when it first started. It just worked out that way.

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00:25:41.650 --> 00:26:05.189

Ron Sanders: So was really intrigued when I learned about Stephanie's program, because we always like to be able to. We always want to build our business. We could actually do it from anywhere. As long as we have our phone, we want to be able to run our practice from from our phone and just looking forward to working with the program, because I think it will help me avoid my adult and not chase around sharing the object.

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00:26:05.860 --> 00:26:09.440

Stephanie Bogan: That's awesome, Ron. Thanks so much. Kevin.

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00:26:14.490 --> 00:26:17.740

Stephanie Bogan: You have. You just have to unmute it makes it so much easier for us.

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00:26:22.630 --> 00:26:24.580

Stephanie Bogan: Can we unmute Kevin

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00:26:29.010 --> 00:26:31.319

Allison Foulk: Mayor Click to ask him to unmute.

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00:26:33.270 --> 00:26:40.960

kevin: So now I was saying, we're in a new, a new building. We just moved to a new location. So

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00:26:41.020 --> 00:26:45.340

kevin: these are my ideas. This is light picture in our conference room.

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00:26:45.410 --> 00:26:50.520

kevin: But now I could use that breathing exercise last night when the eagles

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00:26:50.620 --> 00:26:54.350

kevin: got killed by the New York Giants so tough here in Philadelphia.

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00:26:54.840 --> 00:27:00.809

kevin: But no. Ed and I are business partners to die financial group. As Ed mentioned.

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00:27:00.880 --> 00:27:14.209

kevin: we worked with Stephanie a few years ago, and she realized, really got us going in the right direction. Now we're here to get to the next level, and she helped us get to the first time, so hopefully, second time around, even better. So we're really looking forward to it.

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00:27:14.360 --> 00:27:16.259

Stephanie Bogan: Awesome. So glad to have you back.

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00:27:17.780 --> 00:27:41.419

lhinton: Laura. Good afternoon Laura Hinton. I. Chris mentioned business partners with Chris Waddell, the layer wealth advisors in Birmingham and St. Louis and I've been in the business a little while, maybe over 30, something, maybe 30 years over 30 a quick counting.

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00:27:41.420 --> 00:28:06.109

lhinton: But we're here to I'm here to grow our practice and reach out to the specific areas that we want to focus on this year. And so on a website, we would like to. Really hone in on these, and how to do it, and how to be a better. I guess advisors to our current clients as well.

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00:28:06.230 --> 00:28:08.150

Stephanie Bogan: Awesome. That's great. Thank you.

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00:28:08.650 --> 00:28:09.750

Stephanie Bogan: Leah

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00:28:09.960 --> 00:28:28.550

Liana Poodiack: transition to become.

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00:28:28.590 --> 00:28:32.860

Liana Poodiack: So we're looking for a lot of organizational things, new technology

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00:28:32.880 --> 00:28:46.799

Liana Poodiack: lots of shiny objects out there so kind of narrowing. That field down. Right now is is what we're working on so, looking forward to 2024 and all that none of us can help us with.

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00:28:46.970 --> 00:28:49.519

Liana Poodiack: This is our second year in one of us.

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00:28:50.060 --> 00:28:54.839

Stephanie Bogan: Awesome thanks, Leanna. Good to have you guys back. I see Travis there, too. Hey, Mark!

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00:28:55.680 --> 00:29:06.660

Mark Wade: Hello, everybody, Mark, waiter let's see, this is my 40 fifth year of doing the only thing I've ever done started out in the wire house side of the business

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00:29:06.670 --> 00:29:11.250

Mark Wade: exited as a branch office manager in the great roll up of the eighties

167

00:29:11.510 --> 00:29:13.710

Mark Wade: I went independent.

168

00:29:13.820 --> 00:29:35.849

Mark Wade: and have since created and sold to planning practices, and this is number 3. So I kept and just sold the last. Just sold the last one a little over a year ago. So I kept about 30 million of clients. Client assets on the books, the ones that I wanted to keep. And we're going to create this in a different way a better way, and have more fun.

169

00:29:36.330 --> 00:29:40.850

Stephanie Bogan: Awesome. That sounds excellent great goals to have Travis. Hello, sir!

170

00:29:43.110 --> 00:29:54.770

Travis Poodiack: Hello! Yeah. So I'm partnered with Leanna. Obviously we have the same last name on our son. Like, she said. This is our second year in leaders.

171

00:29:55.270 --> 00:30:00.630

Travis Poodiack: I think, the first year is definitely got hit with a fire hose of information.

172

00:30:00.840 --> 00:30:12.290

Travis Poodiack: I think this year I see it as being able to kind of implement some some specific things that, I think will allow us to kind of create that that efficient

173

00:30:12.450 --> 00:30:20.150

Travis Poodiack: kind of growth oriented raa firm that will be starting. Gosh, like little under 4 months.

174

00:30:20.220 --> 00:30:26.529

Travis Poodiack: So yeah, lots of stuff glad we're we're doing this again. And Stephanie is amazing.

175

00:30:28.160 --> 00:30:39.120

Stephanie Bogan: Thanks. Awesome. Travis. Good to have you guys back, of course. Glad to see you in the office again. They've been out of their office for months and months and months on top of everything else. So good time head by all.

176

00:30:39.230 --> 00:30:56.780

Sara Stanich: Sarah. So nice to see you. Yeah. Nice to see you, too. I'm Sarah Stanwich, my firm is called Cultivating wealth and II will also, in a lot of repeat. You know people here. I also worked with Stephanie a few years ago, and I was just thinking.

177

00:30:56.890 --> 00:31:25.809

Sara Stanich: you know, so much has changed since then. I changed custodians. Some some members of my team changed. I, personally, I moved from New York City to Montoc, New York. So out of the beach, and we're like a completely virtual practice now. So a lot has changed. And so it just seemed like a really good time. And of course our assets have grown, and everything too. So now, you know, that wasn't a leader, you know, few. And a few years ago

178

00:31:25.890 --> 00:31:39.250

Sara Stanich: so it just seemed like a really good time to reset and kind of like refocus more about the team and less about me personally as an advisor. And you know, just just position us for

179

00:31:39.680 --> 00:31:44.229

Sara Stanich: growth and satisfying fun place to be

180

00:31:44.370 --> 00:32:01.349

Stephanie Bogan: yeah leaders. I think you know the theme here is right scaling growth, but we all wanna do it in a way that stays or right is very satisfying versus right, it becoming. All the data shows that after that 1.5 million advisory satisfaction drops and doesn't recover.

181

00:32:01.650 --> 00:32:16.949

Stephanie Bogan: It drops incrementally in the studies every single year after 1.5 million. It's like the peak of what you can do without all the complexity right? And the scaling people and processes. You know the the real management, right? And building begins.

182

00:32:17.000 --> 00:32:36.209

Stephanie Bogan: so the good news is that's what leaders is all about is right. How do we do it? Mark to your point. Better the next go round than we did the last 10 or 20 or 30 years, so that the next 2, 5, or 10 are just wildly more effective in terms of growth and what we want, but also a lot funner for us.

183

00:32:36.510 --> 00:32:47.419

Stephanie Bogan: I. We've had so many people and leaders that were planning on, you know, building value to sell, and they got to a point where they were had enough time and freedom. And you know it was working that they were like, why would I retire now

184

00:32:47.610 --> 00:32:56.600

Stephanie Bogan: like I can still drag you this part that I love, and I've got the rest of it all worked out. So



it's just it gives you options for how to write, how to find that happiness and joy as well.

185

00:32:56.660 --> 00:33:00.280

Stephanie Bogan: Alright, w/ a team. We see you there now, how was lunch?

186

00:33:04.300 --> 00:33:23.179

WFA: Hey? We have. Lunch was good. We scarf our face. So yeah, my name's Danny Martin Chase crops. My business partner. We're both participating. We are sitting in Shreveport, Louisiana. We have an office here. We actually have 2 offices here. We have a practice in Fort Worth, and we have a small office in South Louisiana.

187

00:33:23.190 --> 00:33:33.629

WFA: We both are in our late 30 s. Early 40 s. We have a team here of 3 advisors and 4 administrative assistants.

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00:33:33.640 --> 00:33:38.739

WFA: We also have another advisor and a virtual administrative assistant in Fort Worth.

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00:33:39.050 --> 00:34:01.949

WFA: We are between 4 and a half and 5 million of revenue and just cross about 460 million of aum. We were part of the peak coaching program for a lot of years. Chase more than I was, and sort of build our firm with the processes and the welcoming committees and the gifts and things like that. And now we're really focused on making sure to continue to grow the practice

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00:34:02.130 --> 00:34:13.110

WFA: as efficiently as we can. And we have a pretty good grasp on our work life balance, but can always get better. So we're excited. At least I am to sort of see what

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00:34:13.120 --> 00:34:21.219

WFA: the mindset part on top of the actual practice management can do for us. So great.

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00:34:22.139 --> 00:34:44.039

WFA: Yeah, I guess I would just add, of course, first time here excited about that. Given that a lot out of coaching previously. Shannon spots. Spots with the president of Rg. Recommended us Stephanie and her program, and I take everything that she says very seriously. She's given us several path to go down that have really continued to transform the business.

193

00:34:44.179 --> 00:34:56.989

WFA: We bought the practice from the founder 3 years ago, and the the firm was stagnant at for a long time, and it's like, taken all so like our pace of

194

00:34:57.300 --> 00:35:16.169

WFA: like speed that we're on and like what we expect. If we can hit. You know the 1 billion dollar mark, or beyond that, I know the business will look and feel a lot differently than it is today the team will have to be different. The processes will have to be different. So we're looking to the coaching program to



help us with that.

195

00:35:16.170 --> 00:35:30.529

WFA: And then, like with Danny said, just continue to get better. Learn from other practitioners, you know, and your experience of outside of the Rpg. System under that's going to be valuable and just excited about learning and growth.

196

00:35:30.570 --> 00:35:37.549

Stephanie Bogan: Excellent! Great! Well, we're looking forward to it little known fact. I actually lived in Lafayette, Louisiana, for a year.

197

00:35:37.890 --> 00:35:45.590

Stephanie Bogan: and I'm a very big fan of Gumbo. Yeah, you just can't quite get Gumbo anywhere else the way you can get it, Louisiana, just saying.

198

00:35:46.070 --> 00:36:09.160

robertwyrick: Robert, tell us a little bit about yourself. Where are you here? Hey, Stephanie? So, Robert Wire, I run postal private wealth advisors in Houston, the energy capital of the world. People in the office are often entertained by the fact that that's the Enron building behind us here. Now, Chevron. But that was the monument they built to themselves. So I previously built a firm

199

00:36:09.160 --> 00:36:21.039

robertwyrick: that was about 1.2 billion dollars or so that was acquired, and I became CEO of the acquiring company. And then we started post out from Scratch about 7 years ago.

200

00:36:21.180 --> 00:36:36.149

robertwyrick: really just with the idea of being a bit of a boutique, and and we are indeed to Boutique. So we're we're at about 225 million or so. It's been all organic. But and I think I mentioned this to you the first time I spoke, or the time I spoke to you, Stephanie, is that all the things that

201

00:36:36.220 --> 00:36:42.090

robertwyrick: the mindset that I use to build my first firm. It seems like I've forgotten.

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00:36:42.260 --> 00:37:01.889

robertwyrick: And and we're just sort of not really stuck. I mean, we're growing it. We're still growing organically, but but really been able to get a a better handle around systems and processes and staffing. And again, you know, the the mindset. Yeah, with the idea of of building another 1 billion dollar form of over the next few years or so.

203

00:37:01.940 --> 00:37:17.119

Stephanie Bogan: which is great, Robert, I think it's a great goal, it really. What leaders all is all about is that you all have a more and better that calls. But when we think about doubling or tripling, or 10 xing. We don't usually want all the other stuff that comes with it. We don't want to

204

00:37:17.120 --> 00:37:35.169



Stephanie Bogan: 4 extra hours, and our frustration and our staff size and our expenses right? We want. It's that very old saying of right working smarter, not harder. And I think Robert makes a really good point, which is a lot of management. Consultant theory has been written about what got you here won't get you there right? Some right?

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00:37:35.250 --> 00:37:40.620

Stephanie Bogan: great consulting and consultants. Right? We use that we use these conversations all the time.

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00:37:40.660 --> 00:38:01.580

Stephanie Bogan: which is, how do we? How do we really figure out what is working, and what does make us successful because we don't want to get rid of that right? We wanna double down on that. What we do wanna do is figure out really clearly what's diluting our talents? Our teams are right, our profitability, so that we can surface those issues and deal with them.

207

00:38:01.620 --> 00:38:29.529

Stephanie Bogan: And then, far more important than that which is one of the things that I think you'll get out of leaders that you know we don't really. You can't ever really capture it in a brochure in A, in a worksheet is it's that leadership model of thinking we were talking about in our lifestyle Kickoff earlier. Adam, who's one of the advisor coaches. Right? He's been through the program right? From 225,000 to 1.2, and he's got a 40 or 50% growth rate, like he's just do right. Did it all, doing it all working great.

208

00:38:29.570 --> 00:38:43.149

Stephanie Bogan: And we talked about like when he started he was frustrated, or he got a certain point, and he really had to stop and deal with things, and he dealt with them a certain way, and that way didn't really get him the results that he wanted. And I said, You know now.

209

00:38:43.450 --> 00:38:54.689

Stephanie Bogan: you know, when you sit down to do your planning for the 3 years and what you want to focus on this year and your priorities, and how you align your people. Your like is that like a big thing? And he's like, No, I like. It's just what we do here.

210

00:38:54.730 --> 00:39:08.579

Stephanie Bogan: right? So the idea of moving into that empowered proactive state that we talked about when we kicked off with the breathing exercise is really what we're looking to create here in our thought habits it begins and ends there. Really.

211

00:39:09.000 --> 00:39:11.719

Stephanie Bogan: then, in our personal habits.

212

00:39:11.820 --> 00:39:36.129

Stephanie Bogan: right? How we show up at home and and at work? Do we check email 17 times a day? Or right? Do we have the ability to maintain focus and attention, discipline. Those are things they don't actually take my son jokes, you know they teach you to. He's very bright, but sitting still and paying attention might not be his super power, and he's like, you know, they tell you, to sit still and pay attention in math class or English class. He's like, where was the class on sitting still and paying attention.



213

00:39:36.440 --> 00:39:54.449

Stephanie Bogan: And I just thought, God, this kid is way too perfect for school. That is the problem. Right? Proud mother. Obviously but it's point like we have the attention span of the net. Literally, goldfish have a longer attention span. We can hold our attention on average, for 7 s of goldfish can hold it for 8.

214

00:39:55.410 --> 00:40:09.079

Stephanie Bogan: Some of us, it's like half that cause right? Like our brains are just going everywhere, and they're operating at 150 miles an hour. And there's some really cool things to that. But there are things we also have to manage. So the whole goal of limitless is to give you a model

215

00:40:09.440 --> 00:40:24.180

Stephanie Bogan: for better, more empowering thought, habits, personal right, and behavioral habits at life at work. And then those business habits. Right? It all translates into the business habits, the people, the process, the platforms, the pricing models, the packaging all this stuff

216

00:40:24.750 --> 00:40:38.799

Stephanie Bogan: right? So that we actually align each of those components. So we've now optimized. If we have a hundred components in our race car and we're trying to get it to go faster. We can hire people to push it around the track and it will work. It's just time consuming and exhausting.

217

00:40:38.830 --> 00:40:52.720

Stephanie Bogan: But if we take out each of those components and start to look at them and fix them and optimize them and put them back. That in incrementally creates a much greater effect right at the optimizer effect. And that's really what we're gonna do this year and leaders.

218

00:40:52.890 --> 00:41:08.910

Stephanie Bogan: And before we get to the very fun work of doing that, we have some things that we need to go over one. We've talked a lot about this. Our goal here is help. You build a wildly successful business and a life that you love, right to live those 5 freedoms that we talk about, work with purpose on your terms.

219

00:41:09.000 --> 00:41:28.170

Stephanie Bogan: do work that you love with people that you enjoy enjoying all the financial success you desire, and living a life of happiness, fulfillment, and contribution whatever that means to you. You might wanna grow to 300 million, 500 million, a billion, 10 billion. It doesn't matter right. It's about the path that you take. And you know the experience that you have getting there.

220

00:41:28.560 --> 00:41:43.290

Stephanie Bogan: So we are not gonna do this this second. But I do. Wanna warn you that there will be a quiz at the end of this call. That is, in fact, attended to get you to pay attention. So for the next 55 min, no phone, no email, no extra tabs. No distractions.

221

00:41:43.670 --> 00:41:57.990

Stephanie Bogan: Attention in focus is a muscle. We're gonna give you this opportunity to build it, Leanna. You were in the lifestyle call. So you don't you? You can. You have permission to put on your



little video and do some stuff while we're going through this. There will be a quiz. So pay attention.

222

00:41:58.410 --> 00:42:22.339

Stephanie Bogan: I'm Stephanie. You will on occasion see Adam, our advisor, coach I. If you were on the lifestyle Kickoff, you saw him this morning. If you join any of the lifestyle calls or watch a lot of the recordings in the library, he'll be there. He's gone through the program very successfully. He's now scaling and growing his own leaders firm again, very, very successfully. So he's got a lot of great how to application and insights

223

00:42:22.390 --> 00:42:40.150

Stephanie Bogan: both on the mindset and the method side our practice coach, Natalie. She's about 20 years experience. She's worked with me on and off in different capacities since she was in college. So she very much knows the ways, if you will. And she worked with us at limitless came down to Costa Rica for a couple of years.

224

00:42:40.230 --> 00:42:58.449

Stephanie Bogan: So she's very familiar with limitless and all the practices in that context. And then branched off and started her own firm beyond. Fa she now has. So if you have deeper needs or need implementation support beyond the program, happy to. You can talk to Natalie about that, but you get quite a bit at

225

00:42:58.450 --> 00:43:15.379

Stephanie Bogan: quite a bit of it as a function of the program and she will pro very likely be one of the people that you spend a lot of those practice calls talking to and then, Liz, our Mindset coach. Natalie is also got an executive coach. She's got her coaching credential. So it's nice that like me, she can sit on both sides of that fence.

226

00:43:15.380 --> 00:43:30.860

Stephanie Bogan: Liz has gone through the lifestyle. And now the leaders program for 2 years and is running very successful firm that's growing. And she loved lifestyle and the mindset piece so much. She actually went out and got her coaching certification and is really fantastic

227

00:43:30.860 --> 00:43:59.919

Stephanie Bogan: so she does a lot of our mindset head space calls here. And Natalie can both talk to leadership issues, teams, communication, not just from the methods. Right? But from how do we send that really great leadership, space work and communication, etc.? So if you find yourself stuck or stalled right, Natalie or Liz are both great people to talk to. If you wanna talk to someone who's kind of been there done that in your shoes right? You wanna ask Adam about how he did it, or how he would do it. And then I'm here to cover all things limitless.

228

00:44:00.070 --> 00:44:08.610

Stephanie Bogan: specialize, complex or otherwise. Having worked a lot of very, very large firms. So if we get to 150 or 200 million in revenue.

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00:44:08.700 --> 00:44:14.009

Stephanie Bogan: I won't have done that yet. But you guys have a lot of runway before we get there.



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00:44:14.300 --> 00:44:40.159

Stephanie Bogan: So with firms like Carson and United and Genworth have really had a lot of fun, not just scaling inside those organizations, but helping right? Their larger firms really scale and grow. And you guys are really all sort of in that window where you've achieved a level of success. But you now have an opportunity to really take it up a notch. As I said, we just want. We don't want history to repeat itself in terms of the experience we want to improve upon that this time.

231

00:44:40.440 --> 00:44:59.450

Stephanie Bogan: So some of you have seen this right. These are the resources that we're gonna bring to bear. You've got a tested track to run on everything we talk about here. We've done many times we are not practicing and we've got the samples, the scripts, the path you've got peers and past alumni right. Engage with. See how they did it. Look at the samples

232

00:44:59.450 --> 00:45:24.419

Stephanie Bogan: right? You really don't have to start from scratch. Obviously, you've got coaches that we hope you trust us. And right, if you wouldn't if you didn't probably wouldn't be here. But really, to help you elevate your game proven practices. You're gonna get the best practices that we have not just mine, but all of our coaches and other leaders. Right? We integrate and assimilate all of that knowledge and a path to follow. But we're gonna be able to customize that path to your firm. And so

233

00:45:24.420 --> 00:45:26.920

so that we can make sure you apply it

234

00:45:26.920 --> 00:45:51.859

Stephanie Bogan: in the ways that really work for you no shortage of tools or training gonna be a lot of accountability. And the people on this call, there's actually a couple of alumni who aren't here. And I think some other people that will be joining us. But these people and the people that you connect with at events you're gonna become pretty close. Typically, you're gonna get to learn a lot about each other. You're gonna realize you have a lot of the same issues. Most of the same issues.

235

00:45:51.860 --> 00:46:17.510

Stephanie Bogan: You're just applying them in different places with different clients and different teams. But it's all exactly the same. And yet it's all entirely different. So there's so much feedback collaboration and engagement, the end support that you'll give each other. I think I've shared with all of you at least once like, no matter how I put that number. Sure it's Ne. It never sounds as cool as it actually ends up being so take a look at these shiny faces because you're gonna spend a lot of time with us this year.

236

00:46:18.440 --> 00:46:22.650

Stephanie Bogan: Alright, what do you have? And what do you wanna build?

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00:46:23.430 --> 00:46:29.170

Stephanie Bogan: We're going to show you the nuts and bolts of limitless and where to find things and what emails to call, and all of that

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00:46:29.210 --> 00:46:59.159

Stephanie Bogan: but I want you to just pause for a second. Look at the options on your screen, right?



We've got our lifestyle practice right? It's really about succeeding. But it's just serving right. There's not a lot of capacity to do more than that. Your successful firm, right? It's founder, partner driven like you still have to be there. But you're scaling growth so could be super successful. And then you've got autonomous business which a lot of you are really working toward, even though you might not choose to be right gone from it for a long time.

239

00:46:59.160 --> 00:47:14.760

Stephanie Bogan: Which is, we want a business that's independent, transferable, which means it has value outside of our being there, one of the key drivers, evaluations and M and A. Right. And it's got that value piece. So it doesn't mean that you're working your way out of a job

240

00:47:14.780 --> 00:47:37.880

Stephanie Bogan: literally. But it's about, how do we build and scale growth in the practice that will grow? Not just beyond us. How do we create right income outside of Laura showing up, or Ron showing up, or Mark showing up right? If I'm gone for 6 months, can we actually still grow? And then, if or when I step out, how do I make sure that we can not only sustain the firm, but we do have a scaling asset

241

00:47:38.330 --> 00:47:53.489

Stephanie Bogan: right? Whether an acquire or an internal sale. They generally like that. It's usually how the buy out is funded. Right? So just again. There's no right or wrong here. Some of you might be like, Hey, I wanna be a 2 million dollar leaders, lifestyle. It's probably not the case. But you could

242

00:47:54.290 --> 00:48:10.269

Stephanie Bogan: right? It's about what your version of the business model looks like. And then we're going to build to that business model over the course of the year, and most of you are going to be in that successful firm to autonomous level. But we're trying to build with a lot more of that autonomy and independence from you in mind.

243

00:48:10.890 --> 00:48:16.190

Stephanie Bogan: Here's the model that we're gonna go through. You've all, I think, at some level. Heard me talk about the 9 shifts.

244

00:48:16.240 --> 00:48:37.540

Stephanie Bogan: Right? We've kind of build a model for success. There's 9 components of the practice that we're gonna look at and those components all covered these 5 areas marked Virgin, who's obviously brilliant and a good friend of mine did a study with Eliza back in 2021 and they concluded, I think, as many of us right with surmise.

245

00:48:37.540 --> 00:48:49.919

Stephanie Bogan: that these are the 5 things we really need to build a working model for our business, a clear strategy and aligned structure. That means we can't say that we're a boutique firm, and then we right take everyone and charge low prices.

246

00:48:49.980 --> 00:49:06.320

Stephanie Bogan: Right? We've got the right people. We've got efficient scalable processes, and we've got a growth engine, and I will define, as we have many times here at limitless growth engine in which you have a steady stream or steady pipeline of high quality, right? Your ideal clients



247

00:49:06.430 --> 00:49:11.650

Stephanie Bogan: with a 70% or better conversion rate that is in line with your growth goals.

248

00:49:12.220 --> 00:49:26.530

Stephanie Bogan: and for the most part, when you get that engine going, it should work largely without you, or you should be able to get a lot of effect with a much more limited amount of you. Right? So that's the difference between sales and marketing and having a growth engine.

249

00:49:26.810 --> 00:49:48.629

Stephanie Bogan: Right? Efficient processes is all about leverage and institutionalizing and automating, so we can bake in our awesome sauce, deliver 5, 10, explore value, but have the processes, and the people create the leverage as opposed to us, having to be there, and be present and guide, and direct, and push and check and babysit, and all those things that consume so much of our time.

250

00:49:48.730 --> 00:49:56.829

Stephanie Bogan: So if we have a clear strategy and business model and structure in the beginning, it's all about people process and platform and then ultimately about your growth engine.

251

00:49:56.920 --> 00:50:19.090

Stephanie Bogan: So each of our leaders retreats will cover one or multiple of the shifts that go into these topics, and different than lifestyle. We will spend a day and a half or 2 and a half days in the in the May, richly breaking them down, doing those deeper shares, breaking into work groups, really getting a feel for each of these issues so that you can take them back and really apply them in your practices.

252

00:50:19.550 --> 00:50:41.729

Stephanie Bogan: These are the 9 shifts that we'll cover, elevating your thinking. That's not a quote lesson per se. You're gonna just see that as we did at the beginning of this call, get baked into pretty much everything we do, because that's the accelerant in the car, right? It takes the octane from 60 to 90 pretty quickly, and that's what allows you to move through everything else much more effectively

253

00:50:41.750 --> 00:50:52.560

Stephanie Bogan: designing your model practice. What does that next level of the business look like, are we clear on that vision what that structure needs to be that is aligned. What's it going to take? Why do we actually want to accomplish it.

254

00:50:52.800 --> 00:51:14.680

Stephanie Bogan: taking charge of our time. Pretty obvious being that trusted advisor. Right? This is sitting in that trusted advisor, space being able to communicate value all the stuff for many of you. This is now about building a team affirm, and teams where other people can sit in that seat successfully, and could continue on without us. So being awesome is one thing, hiring training, and keeping awesome advisors

255

00:51:14.680 --> 00:51:22.940

Stephanie Bogan: is a whole nother, right set of strategy, solutions, and skill sets that, as many of you know, will need to right, grow and develop as we hit that next level



256

00:51:23.180 --> 00:51:45.320

Stephanie Bogan: packaging and communicating your value. That's all the front page stuff telling the story, your website. And again, all of those marketing components for those of you with teams and other advisors building growth engines. We've gotta not only be able to do that. We have to be able to teach and replicate it and then ultimately systematize it. So the firm can generate those kinds of results, whether Chris is there or not there

257

00:51:45.770 --> 00:52:09.639

Stephanie Bogan: staffing for success, one of those really obvious ones not always the easiest one. But we all know that people create. Leverage is finding the right people, putting them in the right seat, right? Making sure that everybody's doing the right jobs. Systematizing your special is all about those processes and platforms. How do we simplify? How do we standardize? And how do we scale? Which is almost always gonna be right with workflows and automations.

258

00:52:09.850 --> 00:52:21.450

Stephanie Bogan: Even when you have a hyper boutique business, we've had people and leaders rate. Their average client was 200 million dollars, and they have hyper specialized processes, those workflows and automations allowed them to do the highest quality of work

259

00:52:21.470 --> 00:52:42.560

Stephanie Bogan: in radically fewer hours. Because once you build the system. The system is built, there will always be unique cases and exceptions with every client. But if you've codified 80% of it, you've got a lot more time for you and your team to show up and actually do the high value high impact work, which is all that busy and factory work we talk about or fake work, as we like to call it.

260

00:52:42.880 --> 00:52:54.040

Stephanie Bogan: and everyone likes gearing into growth. And that's really all about building that growth engine. How are we gonna get clear? What's our growth strategy? How are we gonna leverage that strategy? What channels are we gonna pursue?

261

00:52:54.110 --> 00:53:04.730

Stephanie Bogan: What's our marketing funnel look like? What's our online sales process? Like, all of those pieces are SEO, our data ultimately go into building that sustainable growing growth engine.

262

00:53:05.120 --> 00:53:19.829

Stephanie Bogan: So we're going to cover all of those this year. Here's what's broken down in the 4 virtual summits next week we'll dig into science, vision, time, high performance, happiness, planning, managing performance and managing people, projects and priorities.

263

00:53:19.900 --> 00:53:30.439

Stephanie Bogan: When you have those agendas. it will recommend for year one the first track which is science of success, your vision for success in taking control of your time.

264

00:53:31.110 --> 00:53:56.889

Stephanie Bogan: If you're a return member right, it will recommend high performance, happiness,



strategic planning, and managing firm performance right? So that you can go deeper or up to the next level on those topics. They're all there are recorded versions in the library, so I don't feel like you have to miss anything you're like, hey? I'm year one, and I should follow this track. But I really am interested in the strategic planning. Then you can just go watch that lesson and trust me, you'll get all sorts of great stuff on strategic planning.

265

00:53:57.120 --> 00:54:11.350

Stephanie Bogan: So the idea is, each of these summits will have kind of a core year, one track, and then right a year, 2 or beyond where you're coming back oftentimes and revisiting. You'll get essentially a masters and building a kick ass advisory firm this year.

266

00:54:11.790 --> 00:54:31.610

Stephanie Bogan: Let's be clear like a 3 years master's program. You're not gonna be able to get it all done. You wouldn't completely on your own, much less with all of the help and support that we're gonna give you. What we don't wanna do, though, is like reveal it one year at a time, do you? And make you feel like you're stuck in a 3 year track? It really is right. We're gonna go through these topics

267

00:54:31.610 --> 00:54:55.210

Stephanie Bogan: and it retreats. We're gonna rotate through the deeper ones, right? So we'll have lifestyle summits. Then we'll have those workshops the week after where we spend a day and a half diving in and a half day on each of these lessons, and then we'll follow those with leaders retreats where we're going deeper still on a specific area. So you get the benefit of really getting the 360 degree view of that, and how to apply it in your practice.

268

00:54:55.220 --> 00:54:59.450

Stephanie Bogan: and then each quarter will talk about right? What you're going to focus on that quarter.

269

00:54:59.860 --> 00:55:13.610

Stephanie Bogan: So you're gonna essentially get that master's program in your awesome advisory firm, and then you're gonna break it down each quarter based on hey? What? What's the next? Right hill? I wanna climb or peak right, what's the summit I wanna make?

270

00:55:13.930 --> 00:55:29.030

Stephanie Bogan: So there's sort of a path inside the document called the program guidebook, which you'll get and you're gonna take a practice diagnostic which I'm gonna show you in a moment. You should have gotten some links to that in your emails. And that Pr practice diagnostics gonna give you like a heat map.

271

00:55:29.240 --> 00:55:54.639

Stephanie Bogan: red, yellow, or green. I'll show you a picture, and then you're gonna use that to fill out your guide map. So if it's red, it's obviously gonna be critical. If it's yellow, it's important. If it's green, hey? You're doing good. That's a low priority. We don't start with the greens. Right? Where do we start? We start with the Reds. So that'll give you an overview of where your practices relative to the lessons your goal ultimately is to go through the practice diagnostic and get greens all the way through it.

272

00:55:55.000 --> 00:56:11.680



Stephanie Bogan: And if you remember the questions, or if you've seen some of the questions right? They are really evoke the kind of practice that you want. Ready leave each day feeling like I've been productive, and I'm in charge of my time. And it's being used in ways that line with my goals. Right? We wanna be able to hit a 7 or better in that question.

273

00:56:11.720 --> 00:56:27.050

Stephanie Bogan: right and equivalent in all of the categories as you go through leaders program. So the guidebook will kind of walk you through that. The process you'll really go through kind of your personal climb up the mountain will be one. We'll walk you through that practice diagnostic.

274

00:56:27.210 --> 00:56:40.140

Stephanie Bogan: So you'll answer some questions. It just takes about 10 min. It'll give you a heat map on how you're doing. You'll take these red, yellow greens. Put them into your your guide map so you'll know right what lessons really matter.

275

00:56:40.290 --> 00:56:55.090

Stephanie Bogan: then the idea is to fill out your trail. Guide where you're picking one big priority a quarter that's manageable for most people. If you can get them done absolutely, you have my permission to make it too big. But most people struggle to get one done

276

00:56:55.770 --> 00:57:18.020

Stephanie Bogan: progress priorities underneath that you'll see when you get the form, are just. Your brain wants you to put a couple. It says we can't just do one thing. So what are the other things? You might be working on this quarter. This helps you to kind of chunk it down and get really clear. A big is called a big, because it's a big, important goal. It's something we really need to get done to move the needle in a way that will actually achieve that vision that we said we wanted.

277

00:57:18.280 --> 00:57:35.819

Stephanie Bogan: It might be right building out your marketing plan. It might be, you know, building out the service model role and right getting the Comp and career path done, it might be, you know, redefining your service model and going through client and fee transitions. Right? It will not be the same for each of you every quarter. I can guarantee that.

278

00:57:36.420 --> 00:57:49.100

Stephanie Bogan: So you're going to get the overview right, as you're going to quote classes at the university. But you're going to have your very own right sort of curriculum that you're able to follow as well. So this is going to help you focus. And then at the end of each summit

279

00:57:49.180 --> 00:57:57.710

Stephanie Bogan: you'll do. Actually, our closing section will be an action plan where we really stop and say, okay of the things we covered in this summit.

280

00:57:57.870 --> 00:58:08.459

Stephanie Bogan: What are the ones that are? Gonna make your priority list for this quarter or not? You cause you'll always be able to go back when right when those become the priority, and then, as always, right, you'll have the website and the forum.



281

00:58:08.960 --> 00:58:34.669

Stephanie Bogan: and we will help you. This is what it looks like. We have the 4 virtual summits. We have the 4, the 2 workshops in March and September, where we're diving into those half day sessions on each topic, and really right getting stuff done. And then we have our leaders day and a half attached to each of those, and then our big 2 and a half day retreat in Jackson Hole this year you are gonna love it! Michael Kitsis will be joining us for that.

282

00:58:34.670 --> 00:58:41.859

Stephanie Bogan: We'll be doing that in May. Every month we'll have oops click away our practice coaching call.

283

00:58:42.260 --> 00:59:02.209

Stephanie Bogan: That's where we're unpacking. We're sharing. We're working through things related right to the topics for the year. We have personal peak, which is our mindset executive coaching call. If you or someone on the team is stuck. You're frustrated, you know. You need to do something, but you're hesitant. I gotta. I know. I gotta look at fees. But I really don't want to.

284

00:59:02.210 --> 00:59:17.560

Stephanie Bogan: you know, whatever is in your head space. You just feel frustrated and overwhelmed. You're not sure where to go like. That's a great place to go. Obviously you can always reach out to me. But that's with those calls for the group or for and then lifestyle office hours. So every month we will get together as a group

285

00:59:17.680 --> 00:59:39.300

Stephanie Bogan: this is both an accountability call. We'll talk through and set your 30 day action plans in that call. So we're taking the program year your priorities for the quarter. And then each month breaking into smaller groups to create our 30 day accountability plans and making sure, right that we're always clear on what we're focusing on for the next 30 days. Right? And then in between those 30 days.

286

00:59:39.620 --> 00:59:45.720

Stephanie Bogan: you will be running your practice and doing the work and reaching out to us as you need. As you need to, so we can help you

287

00:59:46.740 --> 00:59:48.289

Stephanie Bogan: any questions so far.

288

00:59:49.610 --> 01:00:08.860

Stephanie Bogan: Alright. So I just gave you the overview of the calls with leaders we'll have our own accountability cohort call. We have 3 calls scheduled with me. We sent out the link in the registration emails. If you didn't, you all got it. If you missed it, I'll be sending out another one either today or probably tomorrow

289

01:00:08.970 --> 01:00:34.700

Stephanie Bogan: for calls later this month. So I like to do those in January. If you really can't, we can schedule it a little bit later. But we like to do them in January, cause I really like to get right. Get to know. You see, what your issues are, what do we wanna solve and scale for this year? What? What's the



strategy? And then I'll give you some guidance around where you might want to focus right how to apply what we're learning and what we learned in Summit, because we all have had that. And then we'll talk about your game plan for the quarter

290

01:00:34.700 --> 01:00:42.599

Stephanie Bogan: in mid-year. We'll check in. Just are you on track? Are there any issues we need to solve for any strategy developments?

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01:00:42.680 --> 01:00:59.549

Stephanie Bogan: And then into the year is right. Are we on track and making the progress we want? What's what's changed? What's our 3 Year Plan? What are our priorities going forward. We can talk about anything you want in those calls. But I generally wanna make sure, right? We're also creating that clarity and accountability as we go.

292

01:00:59.610 --> 01:01:14.330

Stephanie Bogan: and then we've got those 6 personal coaching pass calls, as I think you all know you can use them. However you want, so if you're like, hey? You will get a quarterly check in. So Natalie and I will reach out each quarter. We'll get information for you about how you're doing.

293

01:01:14.560 --> 01:01:30.860

Stephanie Bogan: and then if you wanna schedule a like just a quick accountability check in, we can definitely do that. That will be an option for you to set up, and then you'll have your personal coaching pass calls to use to apply in whatever way it works for you. So if in that quarterly check in it's

294

01:01:30.860 --> 01:01:47.150

Stephanie Bogan: hey? We need to build out our staffing model on our comp plan. Great! Then we're able to say, Hey, Chris, let's you know. Let's get on a call with Natalie, and let's start laying out strategy for your comp plan. Maybe use a couple of calls to get that solve. Maybe one calls enough and you don't need to use them. You can save them for something else.

295

01:01:47.290 --> 01:02:14.580

Stephanie Bogan: So the idea is for you to be able to use them when and where you need them. The personal coaching pass page on the website will give you the ability to do that. You just go in so we'll check in with you each quarter via that check in, and either ask you for a call or respond to your request. For one. We might have recommendations like I might look at yours, Ron, and be like, oh, I completely get what you're struggling with here. This would be a great place for you to talk to Adam or me, or Natalie, or someone about XY. Or Z.

296

01:02:14.580 --> 01:02:34.490

Stephanie Bogan: But in addition to those quarterly check-ins you have the extra calls to use. However, you want. So you can say, Hey, I wanna just talk with Natalie about specific things every month and schedule them out. You can flex them and just use them when and where you want them. That part is entirely up to you. So we'll talk a little bit more about that in our January call, and how you might want to plan to use some of those.

297

01:02:35.040 --> 01:02:57.760

Stephanie Bogan: I should have all received a calendar for the year and a calendar invite link. If you have

any issues getting that set up, just reach out to the inbox leaders at limitless fault life, and Danielle will happily help you get any of the platform or logistical issues most of the time it works. But if you've got the wrong interface or something or other in your system, sometimes you'll have issues like that.

298

01:02:57.850 --> 01:03:00.839

Stephanie Bogan: If so, just reach out to Danielle. She'll be happy to help you.

299

01:03:01.450 --> 01:03:25.080

Stephanie Bogan: Alison, are you here? Alright? Alison is our awesome, trusting, amazing program manager. So she makes sure that everything that's supposed to happen happens that we have a great program and that all the bells, right whistles and pulleys and everything works behind the scenes. So she's gonna talk with you a little bit about how to have your teams involved, and then we'll walk you through. How to use the website.

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01:03:25.740 --> 01:03:47.530

Allison Foulk: That is right. So for your teams, we have a special space for them on tribe, which is our online forum, they will be able to join 2 spaces there and participate. The first is a team talk room, which is where they will get a downloadable file that will include all of their zoom links for the year and their version of the call calendar.

301

01:03:47.530 --> 01:04:03.270

Allison Foulk: Your team is welcome to attend any of the lifestyle calls. If you really have a special topic, you want them here. Maybe they're going to be speaking with you to something. You could have them join a leaders call, but that would probably be on a one off basis. Generally they would be going to the lifestyle calls

302

01:04:03.480 --> 01:04:17.530

Allison Foulk: as well as they want to join the team member Events page on tribe for events. Your team will go to the Community Forum and watch the event there. They don't need to register for the event like you do.

303

01:04:17.530 --> 01:04:40.259

Allison Foulk: So just have them do these 2 things. All of your team members should have been entered onto the site when you were registering and signing up by clicking on the Add team member button. And when you did that, that just entered them into our teams campaign, so they will have already gotten these communications. But if for some reason they haven't gotten something, let us know, and we will make sure they have access to all the calls for the year.

304

01:04:41.960 --> 01:04:45.729

Stephanie Bogan: Awesome thanks, Allison. Yeah. Now to the fun part.

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01:04:46.090 --> 01:04:55.550

Stephanie Bogan: Oh, almost to the fun part. If you have any questions at all. You guys have your own private email. It is leaders at limitless fa, life.

306

01:04:55.610 --> 01:04:58.559

Stephanie Bogan: li get those emails. Danielle.

307

01:04:58.800 --> 01:05:07.969

Stephanie Bogan: in member services gets those emails and they get priority attention. You can use coaching at limitless fault life. But if you use leaders then we know what you.

308

01:05:08.580 --> 01:05:32.950

Stephanie Bogan: When we want. When you are in particular, teams want help, we have the practice calls again. The personal mindset calls the monthly office hours. You have time with me. You have community which you'll use quite a bit. As we talked about lifestyle. There's a lot of sharing and engaging there. You'll get answers from the coaches, but you'll also get answers from each other. And we have a special leaders, tribe so you guys have a private room there.

309

01:05:33.190 --> 01:05:41.510

Stephanie Bogan: And then, if you need anything in between our strategy calls or your personal calls, or any of the group calls.

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01:05:41.710 --> 01:06:07.089

Stephanie Bogan: all you have to do is, go to your screen, your keyboard and type in leaders@limitlessfa.life into an email, and we will be sure to help you if you have things that you want feedback on. You can post them on tribe and at mentioned me or Adam, or anyone you want to see it, cause that's how we get notified. It shows up in our notifications. If you don't, it won't. So we try to get through them. But there's a lot going on in there. So we just can't possibly get through everything.

311

01:06:07.210 --> 01:06:23.999

Stephanie Bogan: So if you have something you want specific feedback on, look at my website or my comp plan. Or here's what I'm thinking about this. When you take a look at it, you can post it on tribe. And Nat mentioned me, and then the other leaders will see it and are very able to give you good feedback. If you want, you can just email it to me

312

01:06:24.450 --> 01:06:45.949

Stephanie Bogan: at leaders, and I will respond from there, or you can direct message being tried. So there's no shortage of ways for you to get help or support for me directly at any time. Should you need it in between our calls or any of your other coaching calls the website where you'll get a lot of resources, please. I tell everyone this year, and every year of like, oh, I didn't listen

313

01:06:46.490 --> 01:06:54.690

Stephanie Bogan: before you build anything before you draft a letter or a sample or a script. Check the related lesson and check in the library.

314

01:06:55.770 --> 01:07:03.020

Stephanie Bogan: because I promise you someone last year was like, Oh, I worked up all these job descriptions. I'm like, you know, we have samples of all of those right?

315

01:07:03.240 --> 01:07:27.660

Stephanie Bogan: He's like, Wow, I'm like, it's in there. We tell you 50 times. So just doesn't mean

everything you've ever wanted or needed will be in there. But there's a really good chance that it is if it's not, just drop us an email. And it will look sometimes I have a lot of stuff from my private client and larger firms engagement that aren't in the library, cause they're not appropriate for a lot of lifestyle firms. Or we'll be able to get you a solution if we don't have one created. So

316

01:07:27.890 --> 01:07:31.210

Stephanie Bogan: just a few points about how to use the website and the calls.

317

01:07:31.240 --> 01:07:39.879

Stephanie Bogan: Now, Alison's gonna walk you through the very exciting. I mean that really Allison nuts and bolts of what the website looks like and how to use it.

318

01:07:40.450 --> 01:07:48.580

Chris Wedell: I find it very exciting. I I'm seeing the

319

01:07:48.720 --> 01:08:03.830

Chris Wedell: the comments that are going on. And I just because I did not go on the other call today the the one that my team members attended. So that's a lifestyle call, and I know we don't have to. Can you just tell me what that is

320

01:08:04.050 --> 01:08:11.219

Chris Wedell: and how that's just real quick covered what? Yeah, we covered what we're covering with you now with the lifestyle group and your team.

321

01:08:11.660 --> 01:08:31.970

Chris Wedell: We didn't have 100 and something. People introduced themselves. We're gonna have time at the end. We're gonna chat some more you did. Great. Yeah, it's really boring for you. If you have to watch it twice.

322

01:08:31.970 --> 01:08:55.169

Allison Foulk: Yeah, and your team will continue to attend the lifestyle calls, you'll attend. Only the leaders called. We do have a personal development call on Week 3 that you'll both attend, that is, for all limitless members, and it's with coach with our mindset coach, so just be sure to take a look at the calendar that was in your getting started, guide, and it'll let you know the time and the call that you need to be on.

323

01:08:55.540 --> 01:09:01.740

Stephanie Bogan: and I should also iterate. You don't have to be, and your team certainly doesn't have to be on every call.

324

01:09:01.750 --> 01:09:18.610

Stephanie Bogan: So in the lifestyle summits they're gonna get the overview of the program, which is really great for keeping everyone on the same page right, you'll come back and they'll come back. And when we talk about service models or the marketing process, whatever it is, they're gonna know exactly what you mean and be like, yes.



325

01:09:18.620 --> 01:09:41.820

Stephanie Bogan: Mark, that is totally what we should do. Let's talk about how we're gonna apply it here versus Mark coming back. And they're like, Oh, great! Mark went off to another conference, another conference I could shiny id mark. right? So it really does keep them on the same page team members tend to love limitless because we bring structure and organization and accountability and progress which are things they tend to like to create.

326

01:09:41.859 --> 01:09:49.169

Stephanie Bogan: And I know we don't always feel that way, because it's not because we're not always creating environments that allow that really set people up to succeed. So

327

01:09:49.740 --> 01:09:55.830

Stephanie Bogan: you know, just a wild guess. Just my fortune, cookie. This morning.

328

01:09:55.960 --> 01:10:16.279

Stephanie Bogan: Practice calls are great on the lifestyle side, because we'll just be unplugging and unpacking things. And like, how did it work? And Mark share your example? Or Adam, how did it work? Or right? So we'll just be going deeper. So those are always great, but they're certainly not required to re, you know, to attend all of those. The mindset coaching calls are fantastic to listen to. Lots of people come just to listen.

329

01:10:16.560 --> 01:10:40.049

Stephanie Bogan: but you probably your team probably doesn't need to all go to that every single month, just to listen. Right? So those are great to listen to sometimes, and then if there's an issue, someone stuck or stalled, we will cover topics in those calls like self-talk for success or overcoming overwhelm. When we do topics. Those are fantastic calls for everyone to go to cause we're covering a specific idea

330

01:10:40.050 --> 01:10:57.899

Stephanie Bogan: when we're doing just coaching in conversation. Then, right? It's great to come if you actually have an issue that you wanna get coaching around, hey? You know my team is really struggling to be accountable. Great go to the call with limitless and tell Liz your problem is being accountable and get some advice from her on it.

331

01:10:58.020 --> 01:11:02.460

Right? So we can that we really do a lot of kind of spot coaching in those calls as well.

332

01:11:03.220 --> 01:11:04.529

Stephanie Bogan: So hopefully, that helps.

333

01:11:04.890 --> 01:11:11.609

Ihinton: And then office hours obviously come, if you have questions. There's a lifestyle office hours. We have the leaders. One

334

01:11:11.690 --> 01:11:24.000



Stephanie Bogan: your team can go to office hours. If they just wanna listen in or they have specific questions. You should definitely come to the leaders. One, because that's where we'll do our monthly accountability check ins and our office hours.

335

01:11:25.390 --> 01:11:29.100

Ihinton: Laura, did you have a question. Yeah, thank you.

336

01:11:29.350 --> 01:11:48.390

Ihinton: co-advisers have this supply. Every all this supplies to co-advisers as well. Yeah, if you're a Co member, it all applies to you. Okay, member, okay? And then when you're looking at the practices like Chris and I, she's completing this. And I'm completing this.

337

01:11:48.390 --> 01:12:15.240

Stephanie Bogan: should we get together and complete it as one or separate. So typically what I'll tell you to do especially when we're doing specific exercises like around vision and goals and clarity and time like in a private client engagement. I would tell you to do it separately, so that you have your own true sense of what you want to accomplish, and why, and then have an internal conversation to discuss that right? I just had a billion dollar firm for partners each do the vision.

338

01:12:15.240 --> 01:12:30.380

Stephanie Bogan: And then we got to reconcile where the vision fit and where it didn't. And then that told us where to focus our con right, our our coaching conversations. So in most cases, if you're if you're in like you've got, you've each got your own client base, if you will, and it's somewhat autonomous.

339

01:12:30.400 --> 01:12:52.469

Stephanie Bogan: then you, but the idea is to really go through. This is a firm and align as much as you can. That doesn't mean you have to have the exact same clients for the exact same size or the exact same pricing. It does mean we need to look at those issues at a firm level, and to make sure that it is aligned with the structure, and that it's additive, not diluted. If that makes sense. If we have 5 advisors by pricing schedules and 5 service models. And

340

01:12:52.930 --> 01:13:00.120

Stephanie Bogan: it's probably diluting profitability. And then we make business decisions about whether we're okay with that and what we do about it. Just as one example.

341

01:13:02.270 --> 01:13:03.210

Stephanie Bogan: does that help?

342

01:13:04.740 --> 01:13:10.500

Stephanie Bogan: Great? Does anyone before we dive into the website, any questions about calls events

343

01:13:11.470 --> 01:13:12.430

Stephanie Bogan: support

344

01:13:13.820 --> 01:13:28.189



Stephanie Bogan: your brain's, gonna forget 80% of it. And you're gonna send an email anyway. And we know this. But we, I asked, everyone just read the emails like, Promise, it's in there. If you really can't find it absolutely reach out, and we are more than happy to help you.

345

01:13:28.850 --> 01:13:30.009

Allison Foulk: Yeah, hey, Ron

346

01:13:30.180 --> 01:13:36.069

Allison Foulk: and I just dropped the slide deck in the chat as well. So you can reference that afterward. It helps.

347

01:13:36.080 --> 01:13:49.729

Stephanie Bogan: Ron just joined us. Ron is another returning member mine. I wasn't sure. I've just figured out. He's like he's done kick off before he's back on. Do you? Wanna everyone introduce themselves quickly? Do you wanna take just a minute to say Hi, and introduce yourself and your goals for leaders this year.

348

01:13:49.890 --> 01:13:57.599

RonWyatt: Sure. They have a chance to work on goals for specifically for leaders. But names are on Wyatt,

349

01:13:57.920 --> 01:14:11.509

RonWyatt: and with true wealth design in Pittsburgh, Pennsylvania. I work here with my son Ryan, who's also involved with the program. He's in Miami beach returning today. A nice long weekend.

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01:14:11.730 --> 01:14:16.459

RonWyatt: and I did the coaching program last year really enjoyed it. And

351

01:14:16.650 --> 01:14:22.749

RonWyatt: it's kind of overwhelming at first, but you just gotta pace yourself and implement one thing at a time, and that's what we're going to be working on this year.

352

01:14:23.230 --> 01:14:24.920

Stephanie Bogan: Awesome great to have you back.

353

01:14:26.160 --> 01:14:49.179

Allison Foulk: Alright, Alison. Now it's your turn. Exciting stuff. Alright. Okay. You can go to the next slide for me. Today. What I'm gonna be doing is walking you through our website through taking the practice, diagnostic our community all the ways which you will engage outside of calls or events with limitless.

354

01:14:49.180 --> 01:15:06.689

Allison Foulk: So the first thing is our limitless member site. I'm just gonna go down really quick. All the different things you can do that are on the left hand navigation when you are signed into the site. So first is you can go into your site this or your account. This is where you would update your billing information if you needed to.



355

01:15:06.690 --> 01:15:30.670

Allison Foulk: If you haven't finished any of the things for getting started. If you haven't finished a form, or you need to download the calendar to your Google or your outlook. You can click on the getting started page there to do so. If you do have team members that you want to add. You can click on this forms button here, and you can add a team member there, or you can complete any of the forms like the big wide form there as well.

356

01:15:30.880 --> 01:15:55.859

Allison Foulk: Next, under the coaching center, we have our coaching calls recorded, so those will be posted your week one and your week, 3 coaching calls will all be here. So if you miss a coaching call, you can just jump onto the site and watch the recording that way. For the coaching pass that is included in your leaders membership. So you have 6 annual calls, and there will be a page that you can click here

357

01:15:55.860 --> 01:16:16.970

Allison Foulk: to get to know each of the coaches better. You can watch a video with them, and then you can schedule your calls with them on the coaching path. Page I'll touch on the practice diagnostic and the results in just a second. And then we also have the learning center. This is where your lesson, your learning path and your library is for all of the limitless content.

358

01:16:17.100 --> 01:16:37.799

Allison Foulk: We also have a retreat section. So this is our events, that we have our virtual summits, and if for some reason you can't watch all of the content on a day that we have an event, or you want your team to come back and to watch it after the fact, you can come to the site and click on retreat and be able to see those lessons there.

359

01:16:37.800 --> 01:16:59.319

Allison Foulk: We also are able to access the good vibes tribe from the homepage as well as the Member Directory. So if you want to share your location, your contact information, your niche with the other members of your group. You can go to Member Directory and fill out a form there, and that will allow you to say what you do want shared with other members.

360

01:16:59.480 --> 01:17:07.399

Allison Foulk: Okay, so that's just overview of the things that are on the site. Can you click forward for me? Step? I sure can

361

01:17:09.320 --> 01:17:23.819

Allison Foulk: alright. So on that left hand sidebar, you have your practice diagnostic. The practice diagnostic is an assessment of 13 different areas that you'll rate yourself. This is the heat map that Steph was talking about earlier.

362

01:17:23.870 --> 01:17:47.490

Allison Foulk: Each category has several questions, and you'll rank yourself on order of not true at all to always true. This is gonna help. You get a pulse, for where you are on the different limitless categories. Red is obviously critical. Need to work on. Yellow is in the middle, and green is, hey? You're doing pretty good at this. So after you take the diagnostic, you'll be able to see what



363

01:17:47.490 --> 01:18:14.500

Allison Foulk: you have ranked yourself, and then also link over to lesson so you could work on them. We'll cover the lessons at the summit. But this is a good way for you to be able to just kind of holistically. Look at the program and where you're ranking yourself, and what you might really need to work on this can help you determine after retreat which areas are read for you and you recently covered to kind of help. Create your own path forward.

364

01:18:14.940 --> 01:18:18.240

Allison Foulk: Alrighty. Next slide for me, Steph.

365

01:18:21.140 --> 01:18:30.899

Allison Foulk: Okay, another portion of the website is the learning center. The learning center has 3 components to it. Lesson learning path and library.

366

01:18:30.920 --> 01:18:50.769

Allison Foulk: The library is where you would go if you knew the name of a resource. And you just really wanna pull it up quickly, download it and get going. So, for example, if on a call, Stephanie mentioned the above the line activity you would come in. You would type in that above the line activity, and then you could click on it, download it and pretty much instantly have it.

367

01:18:50.870 --> 01:18:54.469

Allison Foulk: The lesson page is similar, but only for our lesson.

368

01:18:54.520 --> 01:19:00.659

Allison Foulk: Our lessons. Each include recordings. They include slides, transcript.

369

01:19:00.680 --> 01:19:21.870

Allison Foulk: and they also include action items that you can complete to to help you make sure you're actually applying what we went over in the lesson. You'll have your resources there, and each resource should have a guidebook affil or each. Yeah, each lesson will have a guide book attached to it. So you can go and you can read the guide book and see how all the resources tie together.

370

01:19:21.870 --> 01:19:50.180

Allison Foulk: Our resources include limitless samples. Alumni samples coach samples. So it's a really robust source of content for you as you are actually going in and implementing what we have been talking about at Summit. And then last, we have a reading list for each of the lessons as well. So after you complete your action items, watch the lessons download. Whatever resources you feel really will make a difference for you. You can mark that lesson complete.

371

01:19:50.400 --> 01:19:55.519

Allison Foulk: And then my favorite part of the learning center is actually the learning Path page.

372

01:19:55.650 --> 01:20:17.700

Allison Foulk: We have over a hundred lessons on the website. So that can be a lot to go to the lesson page and see just list and list of things you need to do and watch and work on. So what I would do. If I



was you is, I would spend more time on the learning path page. The lessons there are organized according to topic, and the topics match your practice diagnostic.

373

01:20:17.700 --> 01:20:31.639

Allison Foulk: So you can go in. Say, you wanna focus on building your brand. You would go to the lesson path page, click on building your brand, and then you could watch the trail head lessons there and work on the resource in it resources and action items.

374

01:20:31.860 --> 01:20:55.480

Allison Foulk: If you feel pretty proficient, maybe you're yellow on your practice diagnostic at building your brand, but you still feel like you have some gaps where you could further dive into it. Then you can jump to the advanced climb lessons. So this is a good way to see holistically how all of the content is organized and help you move through it in a way that's a little bit more manageable.

375

01:20:55.720 --> 01:21:04.820

Stephanie Bogan: It's what we call outcome based learning. So your each of the learning paths. I've never tried to create an outcome for a firm and had to talk about one topic.

376

01:21:05.420 --> 01:21:31.770

Stephanie Bogan: Building. Your brand isn't just hey? Building your brand? It's what is your brand? How does that translate to your website? How does that story get told? What's the conversation in that story? How do you train people to tell that story, hey? Did you know that storytelling is actually a skill and a super power? Do we know how to do that like? That's what turns that into a really effective path to get to an outcome. So that's why learning paths are valuable. As you take that diagnostic, it maps you

377

01:21:31.880 --> 01:21:48.799

Stephanie Bogan: to the learning path and lessons, and then you can look and go. You know what. I'm just gonna start with the beginner lesson of building a breakout brand so I can get grounded, and then I'll execute on that, and I'll go back to those deeper lessons as I'm ready, right? It's more important to get a out there than it is to build the perfect car.

378

01:21:48.930 --> 01:22:06.509

Stephanie Bogan: If you are to Alison's Point, a little bit further along in an area, then you can. Just if you're like, hey? I totally get it. You can skip right ahead. Or you're like, actually, I just wanna watch the part of that on website. So I can make sure it integrates into my brand. Then you can just skip straight ahead. So that's how you can kinda climb the hill

379

01:22:06.820 --> 01:22:14.949

Stephanie Bogan: on the path that you want while the program is kind of rotating through that content. It's all there for you to take advantage of when you're ready for it

380

01:22:15.350 --> 01:22:40.829

Allison Foulk: right? And we cover all of the the basic lessons at Summit. So you could attend the 4 virtual summits. You could get really good grounding on the program. And then, if something really resonates with you that you need to dive deeper, you know. Say, you attend the nailing your niche lesson like, Okay, I have that. But they mentioned. There's a marketing to your niche lesson. I'm gonna go to the niche learning path and look at the other niche lessons. So I can further dive into this topic.



381

01:22:41.170 --> 01:22:56.730

Allison Foulk: Yeah, alright. So the big why, which is the next slide, is something that we would love all of you to fill out. You're going to fill it out on the website under forms, you'll click on Big Y and list what yours is along with your top 3 goals for the year.

382

01:22:56.850 --> 01:23:12.110

Allison Foulk: We are going to put this on your personalized home page so that you can have it at the forefront of your mind to kind of help reorient yourself throughout the year. Why are you putting in this work? What are you here for, and help give you that little bit of inspiration while you're going through those lessons and resources.

383

01:23:12.430 --> 01:23:22.970

Allison Foulk: Also, we would love you to share your big why, with your try you can post it there. You can see what motivates other people. And just get to know one another a little bit better.

384

01:23:23.850 --> 01:23:24.840

Allison Foulk: All ready.

385

01:23:27.330 --> 01:23:49.609

Allison Foulk: Okay. So speaking of tribe, you'll access goodbyes. Tribes through the through the member website. Since your leaders, you'll see at the top. There you have your own special space. So you have a leaders, private lounge where you could engage with one another. You can introduce yourself if you have an accountability, partner, that you want to touch base with, you can do so in that room.

386

01:23:49.660 --> 01:24:14.590

Allison Foulk: In addition to your leader space, we have our coaching corner. We have topic rooms. We have member room on pretty much any topic that we cover. So this is a great place to go. If you're working on a lesson, you want feedback on something you want to show a coach and get their real time input on how you're doing question and you're stuck. Come to try. This should be your number one place in addition to your leaders office hours

387

01:24:14.590 --> 01:24:20.429

that you go, you get questions, you get feedback and you get support from your community.

388

01:24:22.040 --> 01:24:23.110

Allison Foulk: Okay?

389

01:24:24.940 --> 01:24:43.120

Allison Foulk: Alright. And that's it. If you have any questions about anything I've covered feel free to email us at leaders@limitlessfa.live and there also is a tutorial on how to use tribe under how to use tribe on tribe. So you can watch that if it just feels like way, too much information.

390

01:24:43.270 --> 01:24:51.899

Stephanie Bogan: Yeah. And all the information that we shared is in your onboarding emails. But if you



need any help with that, as Alison said, let us know

391

01:24:52.530 --> 01:25:04.500

Stephanie Bogan: the most important thing with tribe in particular, but certainly with the website, is just making the time to do it. It's one of those things that goes on the I'll get to it later list, which is why most of you have not gotten to it yet.

392

01:25:04.510 --> 01:25:15.649

Stephanie Bogan: And then it's like left in an email somewhere. And then we forget about it. And so we end up sending you multiple emails. So we really try to keep that to a minimum. So that we're not email drowning you to death.

393

01:25:15.760 --> 01:25:34.409

Stephanie Bogan: There will be inbox insights that come out every 2 weeks, and those will have important information that you need to pay attention to about the program and coaching videos and resources that you may wanna reflect on and think about using. So those are really good to just make sure you read as those come out every other week.

394

01:25:34.850 --> 01:25:46.650

Stephanie Bogan: You should also have received your wall calendar. Has anyone not received their wall calendar? Alright, Laura, we can follow up on that. Sometimes the poster of office just

395

01:25:46.930 --> 01:26:02.939

Stephanie Bogan: likes to take their time depending on when we got your information. But we'll make sure you get one of those. So we said, everyone a wall calendar which has the limitless dates on it. You should certainly, if you have not done it by next Monday, the fifteenth. So sixteenth is the summit

396

01:26:03.090 --> 01:26:14.360

Stephanie Bogan: started to frame out your ideal calendar for the year, starting with all you really need to focus on prior to that time. Lesson is, you're out of office time.

397

01:26:15.370 --> 01:26:24.030

Stephanie Bogan: That is the first thing that should go on your calendar every year before your brain goes. Oh, but wait! What about? I don't know, because they promise you everything else.

398

01:26:24.150 --> 01:26:38.210

Stephanie Bogan: We'll work with the time that you allow for it, but we also know the time will expand the way that we allow it to. So step number one is to make sure that you pull out that calendar and block off your out of office days.

399

01:26:38.230 --> 01:26:45.520

Stephanie Bogan: And if you're doing client meeting searches which some of you are from prior years. You're gonna block off your client meeting times.

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01:26:45.640 --> 01:27:13.910

Stephanie Bogan: If you haven't done that yet or using client searches, you'll learn more about that the first quarter. Alright. So if you have any questions about the wall calendar, let me know. You also got some posted, because we're gonna tell you to write on post. It's an awful lot, and it helps you remember, when you're off doing other stuff that you're part of limitless and bring that thinking into your everyday life. You can also download the circle app and engage in the tribe there. Alison also noted.

401

01:27:15.700 --> 01:27:38.600

Stephanie Bogan: Alright. So we talked about. We did a little bit of the right who were on the beginning. Why are you here? Why is it matter? Why are we also excited about this year, because so much more is possible. We really took a deep dive into operations and logistics which probably has our brains just a little bit mushy. Right now, we just went through a lot of websites and emails and

402

01:27:38.880 --> 01:27:41.730

Stephanie Bogan: so breathe deep breath.

403

01:27:45.530 --> 01:28:02.090

Stephanie Bogan: It's not super important to your brain right now. So it puts it in that not very important category, but a day and a half from now or a week from now, when you're trying to take the diagnostic or fill something out, you'll you'll finally find you end up with that little bit of panic feeling we're like, Oh, my God! Where is it? And this is so frustrating. And it's like.

404

01:28:02.100 --> 01:28:30.059

Stephanie Bogan: is it really or right now that it's important? Your brain wants it. And it's just often an email somewhere. So we've given it to you in emails we covered in this call. You're still gonna forget a bunch of it. But remember that it's there in the emails that we've sent you or you can write in the website is everything with tribe and the website. Or you can email the leaders email, and we will be help happy to help you through it. So the first couple of weeks will be the

405

01:28:30.170 --> 01:28:35.020

Stephanie Bogan: climbing the hill a little bit, and then Ron and Leanna can tell you. Then, as we get into the content

406

01:28:35.190 --> 01:28:42.190

Stephanie Bogan: it gets really exciting. Actually, then we'll be both excited and a little bit overwhelmed. But we'll help you deal with that, too.

407

01:28:42.720 --> 01:28:49.869

Stephanie Bogan: So we're gonna do a lot this year. And it's all it all has the ability to be really game changing for your practice.

408

01:28:49.930 --> 01:28:55.320

Stephanie Bogan: Here are the things that will slow you down. One resist the urge to get overwhelmed

409

01:28:55.520 --> 01:29:07.500

Stephanie Bogan: because we're showing you the master's program in the full curriculum of what's possible right to cover those 9 shifts in your practice. Your brain will do a couple of really interesting



things. One.

410

01:29:07.690 --> 01:29:21.159

Stephanie Bogan: It will instantly judge your progress and say, some version of you're so behind. you must fix this. and then it will kick into. How are we gonna do that? And I don't know, and it's so much work. And oh.

411

01:29:22.540 --> 01:29:24.440

Stephanie Bogan: your brains love to do that!

412

01:29:25.920 --> 01:29:34.109

Stephanie Bogan: If we can remind ourselves that we will literally eat the elephant one bite at a time. And we're gonna take. We're gonna get the program.

413

01:29:34.150 --> 01:29:48.350

Stephanie Bogan: We're gonna take it quarter by quarter. Which is why doing the practice diagnostic focusing on mindset vision and time. We do not want to climb base, Mount Everest just. We don't want to just start running up the mountain will die

414

01:29:48.590 --> 01:29:59.440

Stephanie Bogan: whether you're a planner, a president, or something else in ta, a top performer. Your mind set your vision right. The goal and outcomes you want to create and how you use your time

415

01:29:59.510 --> 01:30:07.060

Stephanie Bogan: to train, to produce revenue, to lead the country like you have to master those to operate at the absolute top of your game.

416

01:30:07.210 --> 01:30:21.140

Stephanie Bogan: and that's really what quarter one is about, because our brains are gonna kick in. They're gonna get so excited like, Oh, my God, I can do all this stuff after him like I'm gonna be so on top of it, and then reality will set in, and your brain will be like Byewah, and then you'll feel overwhelmed.

417

01:30:21.430 --> 01:30:32.669

Stephanie Bogan: and then, if we stay in that place, if we let that story be true, we don't move on to getting organized and getting to work. And that's some version of what people are experiencing already, or you wouldn't be here.

418

01:30:33.280 --> 01:30:45.790

Stephanie Bogan: So just know that we're gonna put a like, think of like the best. Remember those Smorgasbord buffets. Do they still have those restaurants where you would go? And there'd be like 100 different meals and 50 desserts

419

01:30:46.320 --> 01:30:49.099

Stephanie Bogan: if you ate all of it at once. How would that go?



420

01:30:51.280 --> 01:30:53.489

Stephanie Bogan: It'd be like Gross, and you would get sick.

421

01:30:54.120 --> 01:31:22.970

Stephanie Bogan: But if you went up for the appies, and then you digested that had, you know, and then you gave it a little time, and then you went up for the entree, and you ate that, and you digested it. You gave it a little time, and then you went back up for dessert like right. It would be a much more enjoyable productive meal. That's how I want you to think about limitless. We're gonna show you everything on the menu. And then you're gonna take your personal path through customizing that so that we can help you focus on the things you're gonna move the most move, the needle, the most for you this year.

422

01:31:23.190 --> 01:31:42.230

Stephanie Bogan: So I just wanna have a really honest conversation. At some point you will be frustrated, uncomfortable, or just downright overwhelmed. And that moment you will not like me very much. In that moment. I want you to high 5 me from wherever you are, because it means we're doing our job. We are getting you off your comfort. Stick

423

01:31:42.830 --> 01:31:46.790

Stephanie Bogan: right. You all heard me talk about the lollipop and mediocrity. Has everyone heard that one?

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01:31:47.960 --> 01:31:52.790

Stephanie Bogan: Oh, the lollipop and mediocrity mark, do you know what the problem with the lollipop. And mediocrity is.

425

01:31:53.640 --> 01:32:04.990

Stephanie Bogan: it's like sweet. And it's so easy. And you just lick it over and over. And it's wonderful. The only problem is the light pop and mediocrity is that if you take one lick you will set forever.

426

01:32:07.810 --> 01:32:14.920

Stephanie Bogan: because it's just easy candy, right? And that's what complacency is. And then we have these moments where we get really frustrated.

427

01:32:15.500 --> 01:32:24.670

Stephanie Bogan: and we want to make it better. But we have to let go of the lollipop right? So as we get overwhelmed as we get frustrated, that's our our cue to breathe.

428

01:32:24.750 --> 01:32:32.980

Stephanie Bogan: not feeling good as our queue that something needs to be paid attention to. We won't know what actually needs to be paid attention to until we breathe

429

01:32:33.080 --> 01:32:45.580

Stephanie Bogan: and check into our thinking. And really figure out, is this just a head space issue where I'm reacting? Do I actually have a human capital problem? Do I have a pricing issue? Do I not know what



the issue is? And I need to figure it out.

430

01:32:46.220 --> 01:32:49.470

Stephanie Bogan: Everything is figure outable.

431

01:32:49.550 --> 01:32:58.449

Stephanie Bogan: Every issue that you have or will face in your practice is figure outable. 99% of them have been figured out before very successfully many times.

432

01:32:58.940 --> 01:33:13.380

Stephanie Bogan: It's our job to stay in a space where we're able to see clearly, focus our time, energy and capital, and then take the action that's aligned with the goals that we want to see it happen. So when we get clear, which is the opposite of overwhelmed

433

01:33:13.630 --> 01:33:25.119

Stephanie Bogan: anytime you're overwhelmed. It means we have to stop and get clarity. I'm in the middle of building a service model, and I'm frustrated and overwhelmed. It means we don't have clarity about what we're providing to who, why or what we need to price for it to work.

434

01:33:25.400 --> 01:33:28.410

Stephanie Bogan: We could fix that pretty easily. Yep, okay, let's fix it

435

01:33:28.840 --> 01:33:36.080

Stephanie Bogan: right. Those feelings and frustrations are brought. Our brain's response to not being trained to do the next right thing.

436

01:33:36.860 --> 01:33:44.740

Stephanie Bogan: So we're gonna learn that the antidote to overwhelm is clarity. We know how to get that here right. If nothing else, we reach out and ask for help.

437

01:33:44.840 --> 01:33:54.830

Stephanie Bogan: 2. We're gonna get organized. Now that we know what the issue is, we know what to account for. We can marshal ourselves on our resources. What do we need to do? What do we have to account for?

438

01:33:54.920 --> 01:33:59.729

Stephanie Bogan: How am I going to do that? What will it take? Who do I need to engage? Okay.

439

01:33:59.740 --> 01:34:06.259

Stephanie Bogan: that's not a 7 day process. By the way, it's like a 30 min conversation with yourself and a buddy or a coach. If you're really stuck.

440

01:34:06.900 --> 01:34:20.310

Stephanie Bogan: it's just getting into that head space where we can see clearly enough to get that view.



And then, when we've got it, you know what happens every time that resistance that I haven't done it, or I don't know how or I put it off suddenly. The work gets done rapidly.

441

01:34:20.490 --> 01:34:33.700

Stephanie Bogan: because as soon as we remove all the excuses from our brain. It doesn't really have a lot of choice except to right solve the actual problem. And that's when we position ourselves to get to work. So just know that you will feel uncomfortable this year.

442

01:34:33.850 --> 01:34:38.910

Stephanie Bogan: That's how we know we're on the right path, because all growth at some level is messy.

443

01:34:39.150 --> 01:34:51.759

Stephanie Bogan: If you think about butterflies or flowers, anything that grows and evolves in nature first breaks down, and if you look at it in a microscopic level. It's like chaos and destruction.

444

01:34:52.120 --> 01:34:55.130

Stephanie Bogan: But from farther back it looks wonderful

445

01:34:55.380 --> 01:35:03.439

Stephanie Bogan: right? And that's what your practice will look like as you go through this process over a couple of years, or what are you know as you take the it to the next level to scale growth.

446

01:35:03.500 --> 01:35:10.539

Stephanie Bogan: What feels difficult and uncomfortable now will be the moment, and Fly will be turning in a couple of years, and you'll be like, Yeah, I know how to grow.

447

01:35:10.760 --> 01:35:23.589

Stephanie Bogan: I know I'll have to deal with stuff as it comes. I'll have to break things on purpose, as I need to develop solutions as I grow more. But now I'm tuned into how to scale growth and do it in a way that is just not just successful, but ultimately satisfied.

448

01:35:24.550 --> 01:35:36.889

Stephanie Bogan: So next steps are Performance Summit on the sixteenth. If you have not registered, please do that we will, as I talked about, do our January, June, and October calls, I will send a reminder out on that tomorrow

449

01:35:37.090 --> 01:35:53.230

Stephanie Bogan: you've got your to do list, which again is covered in all your emails. And then you've got those personal coaching calls to use with me the practice coach, advisor, coach, or mindset coach. Don't worry too much about those yet. We'll talk about them in our January call and start to think about how to use them.

450

01:35:54.260 --> 01:35:55.720

Stephanie Bogan: You ready for your quiz?



451

01:35:56.820 --> 01:36:04.250

Stephanie Bogan: Alright. I said there would be a quiz, and you've been paying such good attention. So I don't wanna let you down alright. You have 3 min.

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01:36:04.660 --> 01:36:06.610

Stephanie Bogan: This is a thinking quiz.

453

01:36:07.680 --> 01:36:15.470

Stephanie Bogan: I know all the answers. You may not use the Internet in any way. That's the only rule

454

01:36:17.830 --> 01:36:22.109

Stephanie Bogan: your job is to write your answers down for yourself. You don't need to put those in the chat.

455

01:36:25.250 --> 01:36:29.940

Stephanie Bogan: Actually, I'm gonna give you 2 min. That should be enough to do as many as you can.

456

01:36:30.180 --> 01:36:31.320

Stephanie Bogan: Are you ready?

457

01:36:33.920 --> 01:36:36.399

Stephanie Bogan: I'm not giving you more instructions of that on purpose.

458

01:36:36.900 --> 01:36:39.390

Stephanie Bogan: Are you ready? Set? Go.

459

01:36:41.450 --> 01:36:45.630

Stephanie Bogan: come up with as many answers to the problems on your page as you can.

460

01:37:20.630 --> 01:37:22.450

Stephanie Bogan: Got about a minute and a half left

461

01:37:44.390 --> 01:37:45.899

Stephanie Bogan: but a minute left

462

01:38:12.990 --> 01:38:14.419

Stephanie Bogan: about 30 s.

463

01:38:25.850 --> 01:38:27.230

Stephanie Bogan: 20 s.



464

01:38:34.230 --> 01:38:35.500

Stephanie Bogan: 10 s.

465

01:38:40.670 --> 01:38:42.330

Stephanie Bogan: and time.

466

01:38:44.080 --> 01:38:45.380

Stephanie Bogan: Alright!

467

01:38:46.530 --> 01:38:48.220

Stephanie Bogan: Anybody! Get them all

468

01:38:50.000 --> 01:38:52.610

Stephanie Bogan: that makes you human cause no one's done it yet.

469

01:38:52.720 --> 01:38:59.990

Stephanie Bogan: How did you feel if you're not unmuted? This is a great time to unmute. We're gonna take just a few minutes to chat about this.

470

01:39:00.680 --> 01:39:03.129

Stephanie Bogan: How did it feel when you were going through it, Ron?

471

01:39:05.080 --> 01:39:08.699

Ron Sanders: Oh, I'm sorry I have to. Yeah, Sanders

472

01:39:08.740 --> 01:39:10.019

Stephanie Bogan: call you Sanders. Now

473

01:39:10.120 --> 01:39:20.100

Ron Sanders: I'll tell you something, this these types of exercises I have no clue about. So I'm I'm completely lost. right? So overwhelmed, frustrated.

474

01:39:20.170 --> 01:39:23.130

Stephanie Bogan: I don't know what to do. All right. Chris, how about you?

475

01:39:24.740 --> 01:39:31.030

Chris Wedell: Just also press for time. So some stress there? Yes, yes.

476

01:39:31.410 --> 01:39:32.250

Okay.

477



01:39:33.120 --> 01:39:35.299

Stephanie Bogan: Where's where's Kevin

478

01:39:35.440 --> 01:39:36.330

Stephanie Bogan: Kevin?

479

01:39:36.860 --> 01:39:39.370

kevin: Unless you it's fun?

480

01:39:39.770 --> 01:39:41.850

kevin: It was chaos. Yeah.

481

01:39:43.020 --> 01:39:50.539

Stephanie Bogan: anyone have that story in their head like, Oh, my God, I have to win. I have to get them all right. If I don't I'll look bad in front of my new group.

482

01:39:51.960 --> 01:40:02.310

Stephanie Bogan: Yeah, that every time we get one of these I just am like, Oh, I'm gonna let. I don't need to like break. What's that saying better? What is the is really great? Quote

483

01:40:02.960 --> 01:40:07.460

Stephanie Bogan: better to keep your mouth shut and appear a fool than to open it and remove all doubt.

484

01:40:07.760 --> 01:40:11.120

Liana Poodiack: That's a great, it's a great quote, if you think about it.

485

01:40:11.230 --> 01:40:19.590

Stephanie Bogan: Yeah, exercises like this. 10 to one challenge. Are you thinking? What did you have to do first off? Cause I didn't give you very many instructions.

486

01:40:20.020 --> 01:40:26.439

Chris Wedell: Figure out what we had to do? Wasn't that the part where your brain was like. Frustration I don't know.

487

01:40:26.500 --> 01:40:37.109

Stephanie Bogan: And then you notice your kind of stress level rise your breathing shallow like you get a little bit more into that little bit more into that caveman zone right where the stress response kicks in.

488

01:40:37.310 --> 01:40:45.970

Stephanie Bogan: And then when you got some, you felt really great. But what happened when you didn't get one? And you were like I got the other ones. Why can't I get this one? Was, what's that feeling

489



01:40:47.530 --> 01:40:54.999

Stephanie Bogan: right? You're like, Oh, I don't get it, and I don't feel good about it. And then what right? So here's the interesting thing about this exercise.

490

01:40:55.470 --> 01:40:57.209

Stephanie Bogan: Nobody asked for help.

491

01:40:59.830 --> 01:41:03.810

Stephanie Bogan: I said that I know all the answers. It's right there, plain as day.

492

01:41:03.840 --> 01:41:10.690

Stephanie Bogan: And I said that you might not use the Internet, and that is the only rule. At no point did I say? You can't ask me for help?

493

01:41:11.430 --> 01:41:14.480

Stephanie Bogan: At no point did I say? You can't ask your peers for help.

494

01:41:15.550 --> 01:41:20.149

Stephanie Bogan: but we are hard wired not to seek help.

495

01:41:21.000 --> 01:41:25.070

Stephanie Bogan: We're hardwired to just knuckle down and try harder.

496

01:41:25.140 --> 01:41:45.059

Stephanie Bogan: and we'll figure it out, and for many of us. It's because we grew up in time spaces, or had experiences where we had to become very self reliant. and many successful leaders and entrepreneurs are very good at being self reliant. There's also some real downsides to that. Do you think it would have been easier to finish them all in 2 min if you'd asked me for help.

497

01:41:45.730 --> 01:41:46.390

kevin: Yeah.

498

01:41:46.800 --> 01:41:58.990

Stephanie Bogan: Do you think you could have finished them all in 2 min if I broke you into groups of 3 and said, work on these together, cause some of you got some of them that I'm like. I don't know how you got that. And then others you're like, how'd you get that? I'm like, Oh, my God! I had it in a second.

499

01:42:02.130 --> 01:42:03.880

Stephanie Bogan: So the power of

500

01:42:04.270 --> 01:42:09.490

Stephanie Bogan: asking for help is what you've done, which is huge

501



01:42:09.740 --> 01:42:19.799

Stephanie Bogan: because really successful. People know that they don't need to have all the answers. They just have to be smart enough to surround themselves with the people who do.

502

01:42:20.410 --> 01:42:35.380

Stephanie Bogan: and you've done that with me and the coaching team, but certainly with each other, and the peer group, and the relationships, and the sharing and the benefit and the value that you're gonna get from each other. So it's a very funny, challenging way to say one.

503

01:42:35.790 --> 01:42:48.269

Stephanie Bogan: we need to change that hard wiring when we feel that stress response, that frustration, that why do they send me so? I'm not saying anyone said this. I just know how your brains work? Why do they send me so many damn emails? Why can't they just make this simple?

504

01:42:48.480 --> 01:42:59.139

Stephanie Bogan: No, we did make it as simple as we could humanly make it. What we can't control is you actually paying attention and reading all the emails diligently and then going? What do I need to do with this, and I say that with all the love in my heart.

505

01:42:59.380 --> 01:43:10.920

Stephanie Bogan: But if you did that, you would know where what to do or where it's at. So again, that's just the give and take of a program like this. You have the same thing with your clients. Do. How many times, as a client called you up and said, Do you have a copy of my 1099,

506

01:43:11.810 --> 01:43:22.949

Stephanie Bogan: and you're like, Oh, my God! You're the one that sent it to me. In the first place, right? Because we get busy, we get distracted. We aren't sitting in that conscious place.

507

01:43:23.110 --> 01:43:33.229

Stephanie Bogan: and we just want the quick, easy reaction or the quick, easy response. And in other case we get frustrated when we don't get it. we have to be willing to set down the lollipop of mediocrity

508

01:43:33.740 --> 01:43:44.940

Stephanie Bogan: breathe and recognize that everything we're going to do this year is going to challenge your thinking. You had to stop and look at this exercise, and just figure out what the heck you were supposed to do. Oh, it's a word, Riddle!

509

01:43:45.640 --> 01:44:02.060

Stephanie Bogan: But that took some time and energy. You were probably already frustrated by the time you got to that, and then you had to solve the word riddles, and then you couldn't solve all of them easily. It's an interesting mix right? And then, when you couldn't solve it, that was when you made the Third level choice

510

01:44:02.370 --> 01:44:05.070

Stephanie Bogan: of what to do when you couldn't solve them?



511

01:44:06.810 --> 01:44:16.100

Stephanie Bogan: Do we just move on to the next one? Do we get frustrated? Do we get more stressed? Do we ask for help? Do we give up? Do we just go? This is stupid. Why am I paying for to do this? Done game?

512

01:44:18.320 --> 01:44:20.890

Stephanie Bogan: So it's a thinking challenge

513

01:44:20.920 --> 01:44:41.140

Stephanie Bogan: that says, that's exactly what we have to do on purpose. When you get frustrated. Annoyed this year, it means we're doing something right. Send us a tip. No, I'm just kidding. It means that we're we're challenging in a way, in creating resistance. That's uncomfortable. And your job is to sit in that space and tune into that.

514

01:44:41.160 --> 01:44:49.339

Stephanie Bogan: The uncomfortable feeling is your way of saying to yourself, pay attention. Something needs your attention here. It needs to be tended to.

515

01:44:49.680 --> 01:44:56.040

Stephanie Bogan: If it didn't, it wouldn't be feeling you wouldn't be feeling that way. You'd be skipping through the fields making daisy chains.

516

01:44:56.480 --> 01:45:05.700

Stephanie Bogan: So we need to really pay attention. Be aware of our feelings, our habits there and our thought patterns. So we can really get clear and conscious and connect with ourselves

517

01:45:05.820 --> 01:45:25.100

Stephanie Bogan: as we engage changes. This is no different than building your service model, or looking at your client niche, or looking at your pricing model, or looking at your work chart when you look at the page or the problem for the first time. You don't go. No problem, no big deal. You're like, what's the problem? I gotta figure it out. Or this person like you have to. You have to go through your thinking model.

518

01:45:26.440 --> 01:45:39.700

Stephanie Bogan: And that's what limitless is really all about, so that you can feel a lot more ease. Be a lot more clear and conscious and be more effective and have a better time as you go through those changes that we will do this year.

519

01:45:40.080 --> 01:45:46.970

Stephanie Bogan: So that was today's quiz. Your prize is practicing exercising your thinking muscles.

520

01:45:47.990 --> 01:45:54.319

Stephanie Bogan: If anyone has any questions about what the answers are to any of them, I'm sure we can all figure them out. They're kind of fun, though.



521

01:45:57.540 --> 01:46:01.429

Stephanie Bogan: Alright, if you, if you're dying to know, let me know if you can't, if you don't have them all

522

01:46:02.180 --> 01:46:11.049

Stephanie Bogan: alright. So we're gonna cover a lot this year. We're gonna talk about this a little bit more. But if I came into your office, Chris and I said, Hey, you're gonna go to that first summit.

523

01:46:11.190 --> 01:46:40.699

Stephanie Bogan: Did the second submit? Then the third one, and you're gonna pick the things that are, gonna move the needle. One big thing, a quarter you can get to more fantastic, totally possible. Let's make sure we focus on that one thing. I'm gonna have a conversation with you, Chris. Insert your name here, the rest of you. And in that conversation we're gonna agree no different than in the calls and in the guidebooks and the resources. What the rules of play are, hey? We're building a service model. We're gonna define the services. This is gonna be the client minimum. These are the fees we're gonna charge. Here's how we're gonna deliver it. Here's what I'm gonna do. Here's what I'm not gonna do.

524

01:46:40.700 --> 01:46:53.320

Stephanie Bogan: And if you do all that, I'm gonna put \$250,000 in cash, whatever your big goal number is, could be a million. But to put it in your conference room. Maybe your kitchen probably wouldn't leave a bunch of cash in front of your clients to be worrying your laundering money.

525

01:46:53.430 --> 01:46:56.290

Stephanie Bogan: So we're gonna put this suitcase full of money in your kitchen

526

01:46:56.380 --> 01:47:05.639

Stephanie Bogan: where you can see it every day. And, Chris, as long as you follow the rules for that lesson or rate those priorities you get that suitcase full of money at the end of the year. Are you in?

527

01:47:05.750 --> 01:47:07.450

Chris Wedell: Yep, this is like

528

01:47:07.530 --> 01:47:10.950

Stephanie Bogan: dial me, and I'm doing it right. Let's do this baby.

529

01:47:11.130 --> 01:47:13.310

Stephanie Bogan: Now, Chris, here's the only issue.

530

01:47:13.370 --> 01:47:17.809

Stephanie Bogan: Any time you deviate or compromise from what those agreements are.

531

01:47:17.930 --> 01:47:38.990

Stephanie Bogan: your minimum is 10,000. But you took that client at 8,200, because you know, they're close and they're gonna be there soon. Or you said you weren't gonna check your email all the time or



do things your assistant should. But you know it was just a couple of hours last night each of those licks of the lollipop. I'm gonna come to the office and I'm gonna take \$25,000 out of the suitcase. Okay.

532

01:47:40.420 --> 01:47:50.449

Stephanie Bogan: Now we're like, I don't like that nearly as much now for the rest of you. How many times do you think Chris statistically, is going to take money out of the suitcase before she figures it out.

533

01:47:53.540 --> 01:47:56.960

Stephanie Bogan: Best. Guess one time, 10 times

534

01:47:57.700 --> 01:47:58.790

WFA: 2 times.

535

01:47:59.180 --> 01:48:05.849

WFA: You guys, you're gonna you're gonna get really good at just throwing stuff out without worrying about it. Let's just go with one. Most people say, one

536

01:48:06.150 --> 01:48:16.680

Stephanie Bogan: right? Cause I've lost \$25,000. Nope, that's not the answer. The answer statistically. She's gonna do it twice, and I don't. It's this weird thing with your brain where the first time you're like, Ouch! That hurt

537

01:48:17.630 --> 01:48:29.229

Stephanie Bogan: and you're like you go, but but your brain doesn't yet know that it's not a one off event, so you might do it again, and your app set hurt again, and your brain's like, no, Chris, seriously, she's gonna take \$25,000 every time you do that. And you're your brain's gonna be like, stop

538

01:48:31.490 --> 01:48:34.850

Stephanie Bogan: makes perfect sense. Right? Here's the fundamental problem.

539

01:48:35.100 --> 01:48:40.609

Stephanie Bogan: You all have a suitcase full of money. Whatever amount of money you want to be generated from the practice

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01:48:41.550 --> 01:48:47.620

Stephanie Bogan: sitting in your conference room, technically sitting in your bank account. It just hasn't been realized yet.

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01:48:47.980 --> 01:48:50.490

Stephanie Bogan: but all of that potential is there.

542

01:48:50.770 --> 01:49:03.770

Stephanie Bogan: But each decision, each compromise, each inflection point where we don't remember align structure was one of the 5 key things. We don't have a vision, and we don't align all of our



decisions with that vision

543

01:49:03.920 --> 01:49:06.619

Stephanie Bogan: it is impossible to see that vision fulfilled

544

01:49:06.860 --> 01:49:19.469

Stephanie Bogan: on the flip side. If we have a vision, and we align not even all just a good number, a majority of our decisions with that vision, and we show up and do the work consistently. Guess what is inevitable.

545

01:49:21.470 --> 01:49:34.169

Stephanie Bogan: New levels of success, because consistency compounds. Right? So if we consistently apply what we're doing, we're going to get more of it. And if we up level what we're doing, and we consistently play that up leveling is inevitable.

546

01:49:34.270 --> 01:49:41.150

Stephanie Bogan: Does it mean it'll happen in 24 h? It doesn't mean it'll be as easy as rubbing the right. The Jeanie the Jeannie lamp.

547

01:49:41.160 --> 01:49:57.609

Stephanie Bogan: But it can be a lot easier, a lot less effortful, and a lot more enjoyable. And that is what this year is about. So with that I will pause. Do you guys have any other questions around program itself? Logistics where to go for information?

548

01:49:57.640 --> 01:49:59.589

Stephanie Bogan: Your support structure?

549

01:50:01.220 --> 01:50:07.390

Allison Foulk: Okay, Seth, we're about 15 min over. So I just wanted to give you a heads up on that.

550

01:50:07.480 --> 01:50:08.730

Allison Foulk: Yeah, you're welcome.

551

01:50:09.230 --> 01:50:18.439

Chris Wedell: does it always have to be a suitcase of cash as like the target of the goal. Like, is it always revenue generated? Because that's that's tough for me.

552

01:50:19.000 --> 01:50:38.699

Chris Wedell: Yeah, it actually doesn't, especially in leaders. We'll talk about this in the vision session. That's what the big why is. So there's a woman in the lifestyle program for a few years now her name is Christy Reign. She's awesome, and we knew we got along famously when we realized we both counted summers.

553

01:50:38.740 --> 01:50:58.189

Stephanie Bogan: I only have 8 summers left with my kids, 8 Christmases left, and she was like, Oh, my God, I was like, I know it fundamentally changes the way that I think about things where I'm like can't do that. I only have 8 Christmases left. I have to be off most of the month of December. Right. I only get 8 more of these babies. Now it's 5, 3 with my oldest. It's like,

554

01:50:58.670 --> 01:51:10.289

Stephanie Bogan: so it doesn't have to be money. I'm just making a point there. But your big why is really defining, and in the time lesson Adam will talk about like your screen saver should be what motivates you.

555

01:51:10.300 --> 01:51:31.499

Stephanie Bogan: It should be right. One of our clients is a picture of him, you know, Rock climbing as he wants more time to do that for a lot of our clients. It's pictures with their families on awesome adventures, or one of our favorites, Tanya Nichols. Her goal was, she's like, I don't care about the money. I'm doing fine. I just wanna work 30 HA week and spend copious amounts of time laughing with my kids.

556

01:51:31.530 --> 01:51:45.749

Stephanie Bogan: cause she just gone through a messy divorce and just didn't feel like there was enough joy in their house, so she went on to spend loads of time with her kids, takes massive amounts of time off, is off the summer, and has grown her income to personally over \$600,000 a year.

557

01:51:45.780 --> 01:52:01.710

Stephanie Bogan: and she's still working that reduced schedule and enjoying her summer. So making those choices doesn't hold us back. It's a forcing mechanism to show up and make smart decisions that are aligned, and if we do that we don't get too distracted. Amazing things are possible.

558

01:52:02.300 --> 01:52:07.299

Stephanie Bogan: So that is our mission for leaders this year. Chris. Any other questions.

559

01:52:07.670 --> 01:52:30.640

WFA: Hey, Stephanie? I have a quick question. We we wanted to market that we're doing this coaching program to our current clients to show that we are taking another step to grow. Do you have any special things that we could send out that would somewhere on their website? I don't know if I have a specific sample, but just email me, and we'll definitely help you come up with some language for that. I we've done it before for sure.

560

01:52:30.950 --> 01:52:40.670

Stephanie Bogan: I know Adam puts it in a lot of his communications, because, you know, he's like leading a coaching program on how to run a successful practice which is good when your clients are geometry practice owners.

561

01:52:41.920 --> 01:52:43.820

Stephanie Bogan: Yeah, we'll help you with that, for sure.

562

01:52:45.610 --> 01:52:48.279

Stephanie Bogan: Alright! Any more burning questions.



563

01:52:49.570 --> 01:53:16.949

Stephanie Bogan: Alright, I will save. I'll save the more boring but important logistical questions for the inbox. Feel free to shoot those over remember to do your pre work. Get all your ducks in a row before we kick off next week, and then I promise it gets a lot clearer and easier as we clear the runway of the onboarding logistics. Just think about how your clients feel. By the way, cause you guys ask them for a lot more than we ask you for, and it's a lot deeper process. So it's a really interesting view of onboarding.

564

01:53:17.350 --> 01:53:35.180

Allison Foulk: Alright. I did want to let people know. To make sure you're registered for our summit next Tuesday. You need to go to the registration page and fill out some your agenda essentially, which will get emailed to you. So you can access our event next Tuesday. Very important.

565

01:53:36.110 --> 01:53:44.909

kevin: Alright, if you need anything else. Don't hesitate to reach out. It was a pleasure to spend time with all of you today, and we'll talk to you next week. Thank you. Have a great day.

