

LIMITLESS Coaching Call Transcript

February 5th, 2024
Leaders Coaching Call
Peak Performance

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00:15:01.630 --> 00:15:04.239

Stephanie Bogan: Alright. Everyone ready for a great call today.

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00:15:05.250 --> 00:15:12.520

Stephanie Bogan: Whoop! Whoopsie! I'm seeding. We're setting our intention for this last segment of our day. So we have the next 90 min together.

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00:15:12.560 --> 00:15:45.480

Stephanie Bogan: phones off tabs down like, let's be together. And our goal today is really in these monthly calls to really unpack the concepts that we're talking about in those core in the summits. And those core lessons sometimes we'll bring in. Outside speakers will bring in alumni, which is what we've done today. I'll introduce Tiffany in a moment. We'll pick a concept that's really important or really relevant right now, and really just dive into it. But it's any and all things really relevant to your practice

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00:15:45.510 --> 00:15:49.889

Stephanie Bogan: and creating new levels of success there. So I am thrilled.

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00:15:49.910 --> 00:16:05.359

Stephanie Bogan: And you were going to be thrilled to. That we have Tiffany. Charles, the chief growth officer of destiny, capital and entrepreneur, aligned here with us Tiffany was a private client, I guess now, 6 or 7 years ago, with the firm that she was at.

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00:16:05.510 --> 00:16:11.289

Stephanie Bogan: She they joined lifestyle. She ultimately left that firm

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00:16:11.380 --> 00:16:28.119

joined another firm which you're gonna hear all about and then they were like sort of like like alumni coaches last year, which was super fun, and they'll come back more this year and you'll see why. So Tiffany and her partner, Jared, are just really incredible examples of

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00:16:28.330 --> 00:16:41.389

Stephanie Bogan: all the things we talk about right leading through vision leading through change, right? Leading into that next level of success. So tiff, do you just want to say, Hi, and introduce yourself, and then I know they're going to get to spend quite a bit of time with you here shortly.

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00:16:41.400 --> 00:16:57.320

Tiffany Charles: Yeah. See some familiar faces. Hi! I am as Jeff said. I'm Tiffany. I have been in the industry since 2,010 and did 5 years of commercial real estate prior to that, so definitely saw

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00:16:57.320 --> 00:17:14.719

Tiffany Charles: some interesting things from 2,006 to 2,010 on the commercial real estate side, and seeing how people build their wealth, lose their wealth as well as become super wealthy. In utilizing that as an asset class, and then have been.

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00:17:14.920 --> 00:17:43.219

Tiffany Charles: Tip. I've sat, and I think about every seat that you could possibly sit in in a wealth management firm. Got my foot in the door with one of the top firms here in Denver. By executive assistant. If you're good at that, it's really hard to get out of that role. So I got pregnant and got my license while I was on my leave to come back as an advisor, because I figured it was a good time to get my replacement and built my career from there. I'm a part of now a second generation firm

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00:17:43.220 --> 00:17:59.969

Tiffany Charles: where it was taken over by son of our founder in 2,017. He brought me in 2,018 to grow it and so we will talk a lot about just the change, the overwhelm, the step by step.

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00:17:59.970 --> 00:18:13.890

Tiffany Charles: The mistakes and all the things to get to where we are today, which is, we're starting to see levels of real predictable growth. And we have the flywheel going. And we have operational leverage. So we're really excited about what the future holds

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00:18:14.700 --> 00:18:40.210

Stephanie Bogan: and Tiffany will share the story in a bit. But it wasn't always that way, right. It's been a lot of intention and work an inspired, el inspired elbow grease, as I like to call it. A lot of inspired elbow grease. So I just wanna ground us today. I know you've heard this 17 different ways. But I just want to really package and present it is simply and obviously, as I possibly can.

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00:18:40.240 --> 00:18:45.660

Stephanie Bogan: This is our focus for this quarter one to help you clarify your vision.

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00:18:45.690 --> 00:18:58.480

Stephanie Bogan: and by clarify, I don't mean you need a 92 page business plan with every detail, right and models and market audiences and swat. I mean, you know, directionally, are we going to Chicago?

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00:18:58.530 --> 00:19:22.630

Stephanie Bogan: Right? So we were on our lifestyle call earlier today. One of the lifestyle advisors has this great, you know, his big Y and vision is, I wanna build a simple and efficient process practice. So I can spend more time, you know, create possibilities and experiences for the people that I love. Right? He's got all these pictures of his family like, that's a perfectly great vision. If you happen to know that you wanna be a billion dollar firm and have, you know, a leading brand fantastic.

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00:19:22.940 --> 00:19:44.189



Stephanie Bogan: The goal is just to get really clear about what we're investing our time, energy, and capital in into what effect? What's the outcome we wanna create and the clearer we are on the outcome, the more efficient, the more effective, and the more enjoyable the journey will be. And I think one of the big issues we have and tiff. And Jared can talk a lot about this is if we're not really careful.

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00:19:44.190 --> 00:19:56.469

Stephanie Bogan: We get so focused on the goal when we fix this when we hit this number, and then we get really lost. I can certainly, from the first agent, but you get just so lost and busy going and doing and proving and

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00:19:56.520 --> 00:20:13.310

Stephanie Bogan: producing that you're not having a good time along the way, and the whole goal of having a practice and building a business is be able to do stuff that you really love, that you could think and add real value to people, and to prove everyone's improve everyone's situation in the process.

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00:20:13.660 --> 00:20:27.129

Stephanie Bogan: So we're gonna talk more about this. But we wanna get really clear on the vision of what outcomes we wanna create for ourselves and all the other stakeholders in the process. because when the vision is clear the decisions are easy.

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00:20:27.650 --> 00:20:32.499

Stephanie Bogan: they're at least easier. I'm not saying they're without effort or even without economics.

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00:20:33.230 --> 00:20:42.920

Stephanie Bogan: But when we know what we're trying to create, it's a lot easier to synthesize and validate whether something is congruent with that goal or is not.

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00:20:43.000 --> 00:21:03.769

Stephanie Bogan: and we get lost in the messy middle a lot, and we do a lot of work and energy and right. And then we just end up with something that's good but not great, and we have to go back and rework it. So we wanna make sure this next stage of growth that you're entering in your firms is really aligned with the vision you wanna create like you're gonna hear me talk about this over and over and over, and you will thank me for it later.

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00:21:04.150 --> 00:21:18.600

Stephanie Bogan: 2. We want to create a positive mindset and what I call happy high performance. I want to be a happy, high performing professional like. If you told me that I just get to be happy and high performing. That is the best of both worlds to me. I think

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00:21:18.680 --> 00:21:24.520

the great challenge that all founders motivated people have is we've got something

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00:21:24.610 --> 00:21:47.200

Stephanie Bogan: driving us forward. Otherwise why would you be on this crazy adventure? Right? And sometimes that becomes proving and striving, and we get stuck in it. And again, we're not having a good time. And so what I know what all the research shows is that if we have happy, high performing



habits, we'll have a happy, high performing life. It's inevitable.

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00:21:47.410 --> 00:21:55.020

Stephanie Bogan: The question this quarter for each of you is all roads lead to roam. What's happy and high performing for me.

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00:21:56.080 --> 00:22:08.720

Stephanie Bogan: High performing doesn't mean you have to be the biggest. It doesn't mean you have to squeeze in X number more client meetings than the next human like. I want you to embrace Fopo with all that you are. Do you know what Fopo is

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00:22:10.420 --> 00:22:15.319

Stephanie Bogan: Fomo is. Who can give me Fomo? Come on, participation sport today.

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00:22:16.070 --> 00:22:17.640

Stephanie Bogan: Come on, Chris, save me!

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00:22:17.720 --> 00:22:28.940

Chris Wedell: They're missing out. That's right. So what is Fopo? You're passing out. I could be fear of other people's opinions.

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00:22:29.570 --> 00:22:39.010

Stephanie Bogan: I did a post on social the other day 99%. It just struck me like true for me as well. Right deep, deep, deep down, 99%.

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00:22:39.150 --> 00:22:47.550

Stephanie Bogan: Of the things that we don't do or struggle with are related to our worrying about how other people will respond to what we do.

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00:22:48.750 --> 00:23:02.499

Stephanie Bogan: I know I need to raise my fees. But what will the clients think? Well, we gotta figure out a good way to present it and not loop right. But at the end of the day they think they don't want you to be in an upside down unprofitable business if they're reasonable.

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00:23:03.590 --> 00:23:23.760

Stephanie Bogan: So if we have happy, high performing habits, it's inevitable that we have happy, high performing lives, and the cool thing is, we have control over our habits. So we're gonna talk a lot more about that. This quarter. And the third objective is productivity and accountability. How do I make sure there's 2 layers here? We talk about time and productivity.

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00:23:23.770 --> 00:23:35.469

Stephanie Bogan: There's how we use our time. you know. Did I show up today? Did Tiffany do what she said she was going to do? Did she get distracted? Was she, you know, checking her emails 17 times

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00:23:35.570 --> 00:23:43.970

Stephanie Bogan: right like that's being intentional and responsible like, how am I operating the asset? Right? Is the machine running at its highest

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00:23:44.130 --> 00:23:45.420

Stephanie Bogan: and best use?

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00:23:45.450 --> 00:23:57.850

Stephanie Bogan: That's different than what is the machine doing so, we focused a lot on productivity for you as an rate an asset. How many times is Chris check an email, rob? Are you as productive as you can be with your time.

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00:23:58.470 --> 00:24:14.170

Stephanie Bogan: But that's true. Whether you're a junior fa in your firm or the CEO in your firm, what wha the next labor of time and accountability. And we're gonna talk a lot about this at the March summit and then at leaders retreat. So this is gonna be a big game changer, for I hope, for many of you is

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00:24:14.870 --> 00:24:36.789

Stephanie Bogan: how I use my time is different than what I spend my time on, and those are the 2 time levers that create most of your performance and how you feel about it. And then accountability is, how do we hold ourselves accountable for our mindset for our vision and for our time, knowing that those are the 3 biggest levers we have to create new levels of success. So those

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00:24:37.410 --> 00:24:42.129

Stephanie Bogan: our core objectives for the quarter. How do you guys feel about that?

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00:24:43.310 --> 00:24:51.889

Stephanie Bogan: We got workshops and we got calls. We got summits, and it's all really cool. But I want to make sure we get grounded as we kick off right sort of our monthly

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00:24:52.540 --> 00:25:03.360

Stephanie Bogan: series of calls and summits and everything we're gonna do this year that this quarter and each quarter we're really grounded in what's our outcome, this quarter and this quarter thematically. It's get clear.

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00:25:03.380 --> 00:25:13.370

Stephanie Bogan: Get focused and get to work, putting yourself and your team in the best position position for success. So as you implement strategies in your practice as we move forward.

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00:25:13.430 --> 00:25:18.820

Stephanie Bogan: you, the team and your time are all aligned around things that are actually going to get you to that vision.

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00:25:19.100 --> 00:25:21.040

So that's our focus for the quarter.



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00:25:21.140 --> 00:25:32.930

Stephanie Bogan: I wanna pause. Here. I know some of you have started to implement changes who would like to share a win? Just something that they've changed or done since we kicked off just 30 days ago.

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00:25:33.010 --> 00:25:35.850

Stephanie Bogan: That's had a positive effect on their practice.

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00:25:40.320 --> 00:25:46.139

Stephanie Bogan: You guys gonna let the lifestyle people crush you. There were lots of zoom go for it.

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00:25:46.720 --> 00:26:00.050

WFA: So I did. I don't know where I got it, but it had to be from y'all like I think it came from the summit on the meeting, and then changing Monday to CEO. Day running the shop. Tuesday to Thursday. Keeping Friday is flex.

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00:26:00.430 --> 00:26:12.590

WFA: So that's been good because it fits like how I feel. I can move into like surges and work into batches. But the output, I guess, as we're dealing with this week is the most appointments on the calendar for us.

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00:26:12.690 --> 00:26:17.160

WFA: It's like 15 or 20, and we usually have maybe 3 to 5.

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00:26:17.200 --> 00:26:26.189

WFA: So the I guess I would look for help on that like how to manage that. So yes, like I've squeezed my protected and boxed out my time. But it's creative.

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00:26:26.220 --> 00:26:32.349

I could use back to back appointments, which isn't necessarily a problem. I could handle that. Maybe that has to be like that.

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00:26:32.480 --> 00:26:36.690

WFA: But that's kind of what's come out of that.

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00:26:36.760 --> 00:26:47.979

Stephanie Bogan: I think we long term out. That would be better started the process. And now you're growing into it, as we like to say, Yeah, it's like I'm installing this new thing into the

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00:26:48.090 --> 00:26:59.369

WFA: practice. And the output isn't. I'm I don't feel today that, like I have a bunch of bandwidth to do do a lot. I feel like I have a lot more than usual



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00:26:59.640 --> 00:27:01.619
WFA: home up place. Yeah.

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00:27:02.760 --> 00:27:12.739
Stephanie Bogan: Okay. So we'll talk about. Let's make sure a note to make sure we can get with you on surges. But you started that process. You've blocked your you're now using weekly schedule, which is good. It sounds like.

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00:27:12.750 --> 00:27:28.139
Stephanie Bogan: And you're right getting started on surges, because that will be a huge, not just productivity. Gain for you and the team but it'll free up large swaths of time in between meetings when you get it fully implemented. So love that you're moving in the right direction. That's fantastic.

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00:27:28.610 --> 00:27:30.819
WFA: Anyone else have a win.

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00:27:30.990 --> 00:27:31.780
Go ahead

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00:27:32.590 --> 00:27:35.390
WFA: willing to be patient with it. I know it takes some time

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00:27:36.040 --> 00:27:48.479
Stephanie Bogan: yeah, especially surges, cause there's actually a way to execute surges that you wanna make sure that you follow, cause if you don't, you'll get really backed up on the follow up work, and that's not great for you. The team or clients.

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00:27:48.490 --> 00:27:56.119
Stephanie Bogan: So we can talk a little bit more about that. I'll make a note. Alright surges. Alright anyone else have a win they want to share.

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robertwyrick: We'll talk a little bit about about mindset. So there was one of the sheets. I don't remember where I found on on your on the portal, but about some of the meditation. And so I looked at it, and I realized that wait a minute, I half of these. I have, like Paul Mckenna. This I can transform your life in 7 days. I listen to that. Probably I don't know 10 or 15 years ago, and it really is transformative.

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00:28:21.180 --> 00:28:33.479
robertwyrick: Some of the things from learning Strategies Corporation. I have honestly had for probably 30 years some of those the the first ones I had. I think we're like audio cassettes, and they sent Cds. And anyway, I've I've done the

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00:28:33.660 --> 00:28:43.909
robertwyrick: the Paul Mckenna. I think it's called change. I can change your life in 7 days and discuss



really amazes. 28 min. Right? It's a bit of a commitment in the morning or at night.

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00:28:44.100 --> 00:28:54.770

robertwyrick: But it it it's it's what we're doing here, right? It forces you to sort of picture yourself in these very. You know. What does success look like to you? How do you feel, and it's just been

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00:28:54.820 --> 00:29:10.690

robertwyrick: magnificent, right? I don't know if anybody has any any experience with meditation or hypnosis. It's what I did years ago to sort of get to the First Level. And again, it's like I mentioned to Stephanie. Early on. I kind of forgot about all this stuff and I was leaving

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00:29:10.700 --> 00:29:27.039

robertwyrick: for the office the other day, my wife said, why, you were just slam. We have so many initiatives going on, I said. I know, but I'm having a ball right? This is just a blast. And and I didn't feel that way, even like a week and a half ago or 2 weeks ago. So just you know, it's worthwhile anybody's interested to sort of look at some of those resources and dive in.

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00:29:27.140 --> 00:29:43.670

Stephanie Bogan: Yeah, the, it's the I think it's under. Is it vision or time lesson? There's a list called Meditation Resources. You just go in the library and look it up. When I first started learning about mindset and started to shift into what I call happy high performance.

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00:29:43.890 --> 00:30:11.489

Stephanie Bogan: Because, as I mentioned earlier, I think the thing that we all really want is we wanna get up. We wanna do great work. We wanna kick button, take names and add value and make lots of money and have impact. You know, Boston balls in the air like we love that energy right? And then when we we wanna be done like 35 HA week, because that's about what the science says. Like we really Max, out at, we wanna be like and present. It's amazing. And hearts and starts and puppies and daisy chains. And

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00:30:11.490 --> 00:30:23.600

Stephanie Bogan: you know, like all and it's and like, it's, can we live in both worlds? Right? We tend to really bring the world into our personal one, which is really distracting and diluted and defeating, and a lot of really important ways.

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Stephanie Bogan: We don't tend to go the opposite direct right, and I think we all are kind of walking on the edge of this line, where you know we kind of lean this way a little bit, and then we lean like to me. That's equilibrium versus balance work. Life balance says if something goes up, something has to go down like a teeter totter. I just don't accept that premise

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00:30:42.300 --> 00:30:50.170

Stephanie Bogan: like, if time goes down, I could be tenx more productive at work right? It doesn't have to be a negative correlation. So

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00:30:50.380 --> 00:31:05.900



Stephanie Bogan: when I first started. I as you guys know, had left United Capital. If you've heard the story, if you haven't go watch kids, podcast number 24, where I go into the whole thing like I had migrants, I had full body rashes. I thought I was gonna die.

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00:31:06.270 --> 00:31:12.800

Stephanie Bogan: I was like, I have to do something different, like I was so racked with anxiety constantly.

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00:31:13.020 --> 00:31:32.710

Stephanie Bogan: And so I started listening to these learning strategies. It's like biofeedback and bilateral brainwaves right? And there's like words in the background. And I think I started at the one the one on self confidence which is crazy because I was literally at the apex of my career. But I don't remember why, that was just what I was really feeling.

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00:31:32.830 --> 00:31:43.120

Stephanie Bogan: and it is the the brain is essentially a bio computer, which means you can upgrade the code. You can. That's essentially what you're doing is there's now these

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Stephanie Bogan: programs and meditations that have, like binaural beats where right they're doing beats on the left and right side of your brain at the same time. And so you become a more whole brain thinker faster than if you sat on the mountain for 70 years.

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00:31:56.630 --> 00:32:26.279

Stephanie Bogan: learning strategies, right? Is basically just reprogramming you with conscious that you hear 2 conversations at once in your head, which is distracting and cool at the same time, because you're like going back and forth. And you're like, is it working, and they know so much about how the brain has know that we're just hacking it. So you have to be open to that kind of thing. When I started my attitude was, I will try anything that's gonna hack my happiness or my performance, and if it doesn't work, it just doesn't work. I'm not gonna be Judgey.

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00:32:26.280 --> 00:32:34.239

Stephanie Bogan: I'm not gonna be like, hey, you know, I don't think I'm the kind of person that's gonna dress in robes and put crystals around my head and dance around the campfire.

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00:32:34.280 --> 00:32:44.649

Stephanie Bogan: but if that actually worked I would totally do it right, and it turns out there is a little bit of that in there, depending on how far you want to go.

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00:32:44.670 --> 00:32:56.090

Stephanie Bogan: But so for me, learning strategies, which is really cheap by the way, they've got them on self-confidence. Your money, mind. They've got paraleminals. They've got these things called walkabouts.

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00:32:56.230 --> 00:33:02.809

Stephanie Bogan: It's really just brain hacking. So meditation resources.com



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00:33:02.850 --> 00:33:20.019

Stephanie Bogan: has an amazing my husband actually tried it with me, and he's not like I would not put him in the right. Like open minded meditation, self helpy camp at all, and he totally dug it. This guy's like quoting led Zeppelin. It's called how to meditate in 30 days. It's Jeff something. It's on the list.

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00:33:20.030 --> 00:33:35.960

Stephanie Bogan: I use one called brainwaves. So they're doing like brainwaves and frequency. So like, after 7 months, I just started it. I'll keep you posted. It's supposed to like, get you into that alpha state like after 7 months, because it like actually amps up the frequency every month.

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00:33:36.020 --> 00:33:46.070

Stephanie Bogan: It's sort of like the equivalent of being like a monk on a mountain for 20 years without the 20 years. So I'm like I can't promise you it will work, but it didn't cost so much that I'm not willing to invest

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00:33:46.150 --> 00:33:57.229

Stephanie Bogan: in the experiment, I can tell you. When I listen to it, I feel so cheat out like just like 10 min is so grounding. And 30 min. I feel like.

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00:33:57.610 --> 00:34:18.959

Stephanie Bogan: so like expansive and connected. It's it's really, it seems to be really effective. So there's a number of resources like that on there. If you guys wanna check those out in the right in the, in the vein of positive mindset and habits like it doesn't just have to be a game of willpower. There's a lot of science now, and things that you can leverage to hack.

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00:34:19.179 --> 00:34:25.730

Stephanie Bogan: There's things you listen to when you sleep at night. Science is actually proven that those are effective, because when you go to sleep

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00:34:25.790 --> 00:34:53.279

Stephanie Bogan: it's when the wall between your you know, rate that kind of the zone, that dreamy zone when you fall asleep, and when you wake up is when your mind is the most impressionable. It's when you have the greatest opportunity to upgrade and up level what's happening behind that curtain? So they have things that you can sleep with. I have a bunch of them. I use them all like probably 7, like 75% of the nights that I go to sleep. I have my headphones in, and I'm listening to something that's aligned with what I'm focused on right now.

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00:34:53.370 --> 00:35:08.300

Stephanie Bogan: So there's a lot of there's a million other things out there. There's just a few on there. If you want to try something and get started. If you wanna talk about that personally, let me know. I get excited about personal wellbeing and performance always happy to have those conversations.

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00:35:09.180 --> 00:35:25.689

Stephanie Bogan: Alright. Well, Robin, good to see you applying things, and it's funny a lot of what we teach here is being brilliant at the basics. We have this incredible habit of doing things that work and



then stopping once we hit that first goal instead of doubling down on them. So it's great to see you getting back to some of those basics.

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00:35:25.700 --> 00:35:33.540

Stephanie Bogan: and again, productivity and accountability. What are we doing? And is it really aligned with our goals? Is the conversation we wanna have there?

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00:35:33.670 --> 00:36:01.309

Stephanie Bogan: So this month's topic is really about implementing change. And in the case of leaders, you're not just implementing change at the personal or even the practice level. You're implementing change at the team level, which means you have to bring other people with you. So whether they're super excited and on board, or change, fatigued and resistant, you are all going on this journey together, and again the Joel goals to be efficient and effective and enjoyable. So this month

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Stephanie Bogan: we asked Tiffany to come in and share a little bit about her experience. But I wanna just pause before we do that, and ask each of you to pause and reflect on where to this point as we think about implementing change, right? So we've kind of opened the candy store and uncorked the box and said, Here's all the stuff that you can do. It's amazing.

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00:36:20.730 --> 00:36:25.549

Stephanie Bogan: And we're just getting started. So I want you to think about where you are. Where

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Stephanie Bogan: is resistance coming up?

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00:36:29.490 --> 00:36:40.510

Stephanie Bogan: And we're not going to go deep, dive on it. But I want you to just take 30 s to think about it, and I'm going to ask you to share it in 5 words or less. If you really need 6 or 7, it's okay. It's a focus exercise.

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00:36:41.480 --> 00:36:44.930

Stephanie Bogan: Where are you feeling resistance? It might be.

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00:36:45.060 --> 00:36:56.929

Stephanie Bogan: I feel uncertain about where to start. It might be. I just see so much that I want to do that. I feel so behind like, just take a moment to just breathe into your body and get grounded.

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00:37:00.310 --> 00:37:11.469

Stephanie Bogan: And let's just get really clear on where resistance is starting to surface, because resistance means we're on to something. Let's start, Rob, you're first on my screen. Let's start with you.

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robertwyrick: We talked about it a bit last week, but just the stepping away from some of the day-to-day activity email



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00:37:20.260 --> 00:37:26.480
robertwyrick: stepping away from email. You got that in 5 words, Ryan.

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00:37:29.490 --> 00:37:33.540
Ryan Wyatt: I guess the

163
00:37:34.550 --> 00:37:41.850
Ryan Wyatt: kind of planning for the people within the firm just coming up with like processes to

164
00:37:42.900 --> 00:37:51.629
Ryan Wyatt: measure performance would be where I'm at.

165
00:37:51.690 --> 00:37:52.980
Stephanie Bogan: Ed. How about you?

166
00:37:54.620 --> 00:38:11.149
Ed Woehlcke: Mine is the email thing as well. So I I'm I'm not gonna steal that. But it. It's just being more intense. It's just being more intentional with my time. I would say.

167
00:38:11.520 --> 00:38:14.719
Stephanie Bogan: cool, alright. Chris, how about you?

168
00:38:18.500 --> 00:38:23.470
Chris Wedell: There's just so much to do. There's so much to do. Alright. That's 5 words

169
00:38:23.860 --> 00:38:29.880
Stephanie Bogan: so overwhelm right? We can put it in one word, narrowing that focus. Kevin. How about you?

170
00:38:30.810 --> 00:38:31.690
kevin: Time

171
00:38:32.290 --> 00:38:39.279
Stephanie Bogan: with me, Kevin? With Kevin? I'm sorry, Kevin Adelman. Sorry there's 3 Kevin, so

172
00:38:39.950 --> 00:38:41.650
I would say,

173
00:38:42.360 --> 00:38:47.320
Kevin Adleman: guilt working on the business. Not in



174

00:38:47.430 --> 00:38:48.999

Stephanie Bogan: that. Make sense. Yeah.

175

00:38:49.560 --> 00:38:51.260

Stephanie Bogan: Leeana, how about you?

176

00:38:55.410 --> 00:39:01.180

Liana Poodiack: Mine would be the intentional with time delegating tasks.

177

00:39:02.820 --> 00:39:03.610

Stephanie Bogan: Great.

178

00:39:04.660 --> 00:39:06.670

Stephanie Bogan: Kevin at the black table.

179

00:39:07.680 --> 00:39:13.189

Stephanie Bogan: other Kevin, you're gonna be other Kevin hints for

180

00:39:13.930 --> 00:39:14.690

kevin: time.

181

00:39:15.020 --> 00:39:15.900

Stephanie Bogan: time.

182

00:39:16.170 --> 00:39:17.740

kevin: weren't

183

00:39:18.310 --> 00:39:21.879

Stephanie Bogan: is it? Is it just feeling like you can do it.

184

00:39:22.420 --> 00:39:28.370

kevin: No, we're doing. We're walking in the search this month. And how do we implement what we want to implement?

185

00:39:28.460 --> 00:39:34.060

Stephanie Bogan: Okay, so just getting over the how to do it. Hurdle great Sarah!

186

00:39:35.480 --> 00:39:44.590

Stephanie Bogan: It's related to email. But getting out of the habit of multi-tasking like focusing on one thing at a time, Danny and Chase.

187



00:39:45.260 --> 00:40:00.939

WFA: Yes, so my mine would be. Mine would be the email also. Just by habit, not by choice. But I did go from 5 h the last 3 weeks to 2 h and 11 min last week, so I could a bunch of time off of it. I just don't know how to get rid of the other 2 h.

188

00:40:01.040 --> 00:40:04.089

Stephanie Bogan: Well, just notice that your awareness got you half your time back

189

00:40:04.550 --> 00:40:13.920

WFA: right. I told him. He probably can't do it. He was like, well, now the goals go from 2 to 0, and I'm like, Well, that will be 0. But it can be 30 min an hour.

190

00:40:13.980 --> 00:40:23.010

Stephanie Bogan: No problem. I haven't gotten it down to 30 less than 30 min a day. I think the only way to do that is to literally have someone. And you're like, you do email. And I talk to you. And that's it.

191

00:40:23.240 --> 00:40:27.649

Stephanie Bogan: People do do that. I just don't feel like I need to do that just yet.

192

00:40:28.040 --> 00:40:35.729

Stephanie Bogan: Yeah, you can get it down. Just say, like everything that we're talking about on the email thing. And that's free, not Tom. It is doable, and I've never had

193

00:40:36.130 --> 00:41:07.089

WFA: almost. I have a lot of clients. Tell me that, I responded too quick, almost like Oh, I can't believe he got back to me too fast, and that was like, after a day or 2 of not checking and everything. And I've never. This has been a few years now. Now it's never been a problem for any client I have. It's like there's nothing I hadn't followed up on. There's nothing I missed. There's nothing, if anything I think you said is in the last call. When I go into my email, I'm more focused and I'm ready to do it. And it's like I get it done quicker. But then somebody on one of the breakouts last week said.

194

00:41:07.210 --> 00:41:18.039

WFA: if you open it up, it keeps like all that email work in your head while you're trying to do all the other stuff. So it eliminates all that. And so you have more room to think to.

195

00:41:18.550 --> 00:41:24.319

Stephanie Bogan: Yeah, the better stuff might just implement that schedule and trying to make it fit and get it.

196

00:41:24.360 --> 00:41:25.450

Ruben great.

197

00:41:26.250 --> 00:41:32.409

Stephanie Bogan: So that exercise of just checking in with yourself about? Where is the resistance? Is a valuable one.



198

00:41:32.660 --> 00:41:50.270

Stephanie Bogan: Where's the resistance? Because that's where you stand to make that? That's the indicator light that says, this is where my next opportunity for real progress is right. Otherwise we'd be on the other side of that resistance. So it's just to check in exercise to see where you're all surfacing that, and how it's starting to show up for you.

199

00:41:50.860 --> 00:41:55.759

Stephanie Bogan: Alright. So here is the fun part. We talked about our vision this quarter.

200

00:41:55.890 --> 00:42:18.460

Stephanie Bogan: Here is. If you were on the lifestyle call Ryan. I saw you on there I took the 3 lessons that we've gone through. The actions are in the individual lessons. But I took the 3 lessons and dropped in kind of the high Level action plan for each of those. And we've got a trail map that we're putting together for each of the lessons. But we've done it for base camp

201

00:42:18.480 --> 00:42:45.989

Stephanie Bogan: that walks you through the step by steps. If you these are great for you, right? Just it helps you. You and your brain know a little bit more what happens next and what order we'll do them for each lesson going forward super helpful for implementing change with your team so that you have the ability to right kinda map it out and articulate for them what the high, level touchstones are. As you go through that process, so just be on the lookout for those. We'll have them in each of the lessons

202

00:42:46.000 --> 00:43:13.260

Stephanie Bogan: the action plan sample will be in there. We'll put it on tribe, and we'll put it in the next inbox insight and someone. Look at that. Alison already put it in the chat. If you wanna just take the shortcut and download it. But that's just an example of how you would take 3 lessons from the summit, prioritize them. Right? The vision piece is number one, because we need that to really make sure we're clear on what we're executing, and why? And then, right, as we have time to make additional progress, we can dig into those other 2 priorities.

203

00:43:13.270 --> 00:43:18.760

Stephanie Bogan: and as leaders, you have firms to support you, which generally means you can work on more than one thing at a time.

204

00:43:18.950 --> 00:43:30.170

Stephanie Bogan: especially this quarter. Alright. I really wanna get to the highlight of today's call Tiffany's, gonna you know, when she she'll give you the back story. But when she and Jared started. They were taking over the firm

205

00:43:30.230 --> 00:43:42.539

Stephanie Bogan: he had taken over the firm from his dad. And let's just say it was not like they were inheriting a legacy firm which comes with all the legacy issues right? The kind of clients you've got, the team members you have, etc.

206

00:43:42.540 --> 00:44:00.930



Stephanie Bogan: And they really have over the last 5 years worked through so much of that, and they've raked they've kinda got that, you know, more seamless. Well oiled growth machine we talk about across the firm really working. So Tiffany is gonna talk with us in particular with you about implementing change with teams, because

207

00:44:00.930 --> 00:44:06.150

Stephanie Bogan: you're not in this alone. So with that I'm going to be quiet, and I'm going to turn it over to Tiffany.

208

00:44:07.120 --> 00:44:16.180

Tiffany Charles: Hi, thank you. I don't have control.

209

00:44:16.320 --> 00:44:30.590

Tiffany Charles: If you don't mind. There we go, and kind of see the journey of change. Really, when I step in Jared, my business partner, he became majority owner one year before I came in, and he was quickly like

210

00:44:30.780 --> 00:44:46.810

Tiffany Charles: my super. Powers are not growing this thing and that was great because I had done the above the line below the line activities from limitless having met stuff. Prior. And I was like, I'm super clear on a couple of things. I don't love consistently

211

00:44:46.810 --> 00:45:08.409

Tiffany Charles: like running a plan and serving clients over and over. I love opening their mind to it, getting them through the door, getting them to say yes, and then I like to stop there. I also really enjoy I was mentoring a lot of advisors, and I really wanted to be an environment that I felt was the right environment and empowering.

212

00:45:08.410 --> 00:45:17.629

Tiffany Charles: And so I created this chief growth officer position, there's a kid. This podcast out on it if you're interested in hearing it, but it all stems from above the line and below the line.

213

00:45:17.630 --> 00:45:39.730

Tiffany Charles: and what I recognized was as an industry, especially in the boutique space. I was like, there's a lot of partnerships. And that generation, that first generation they had to be the rainmakers in order to have the opportunity to plan. But these successors have teams, and they have, you know, hundreds of clients. And they have all these aspects. And so how do they?

214

00:45:39.970 --> 00:45:55.650

Tiffany Charles: So growth tends to be like this big friction point. And I'm like, why is it their business development built into the raas, or what that transition looks like. So Jared was like, I think that's a brilliant idea, and I would love to work that with you. So that's when we became partners.

215

00:45:55.780 --> 00:46:24.510

Tiffany Charles: So I was like, this is awesome. I'm so excited. And I come in and I'm like, who doesn't wanna grow. Growth solves everything. Well, it turns out we were not growth ready. So those first like



that first year and a half was really hard cause I didn't do. The proper evaluation of like truly was the was there the operational leverage to grow? I looked at the finances, and there was no doubt that we had the income engine to like. Get us there. I looked at the team, and I was like great

216

00:46:24.510 --> 00:46:40.999

Tiffany Charles: like. We still have Steve Founder. We have Jared, and we have a couple of advisors like this is, there has to be capacity here. We only have 250 households, and there's like 4 advisors with 4 support staff benchmarks say there's no way that we shouldn't be able to grow well.

217

00:46:41.550 --> 00:47:03.079

Tiffany Charles: The business was built to serve Steve and for Steve to serve the clients, and like there was no aspects of like centralized notes. There weren't aspects of technology. Steve didn't need technology to serve his clients in a lot of ways. He went in there, and he was very a heart to heart Relationship person, and was like, I can run your numbers.

218

00:47:03.080 --> 00:47:19.020

Tiffany Charles: But what's gonna help you, you know, go home and rest today, and those are the conversations he was having. Well, we have Vcf's that are like there's so much more we can do to the plan right. But we didn't have philosophies written, and we didn't have career pathing. And all these things.

219

00:47:19.070 --> 00:47:43.359

Tiffany Charles: And then, of course, we had the generational shift of going from lifestyle to a practice that is growing on purpose. And that was a hard change for team and we had management in place that had been part of the 30 year vision prior and was not as open to the new vision that Jared and I had to take this firm.

220

00:47:43.450 --> 00:48:09.140

Tiffany Charles: But you know, we we have a lot of our own equity play. And our vision was gonna have to be the one that everyone had to kind of step into or step out and so, unfortunately, while I was ready to get all Gung ho! Like, who are we nicheing? I'm interviewing the advisors. Who do you love to work with, where all of our clients at? Let's call the Cpas like, let's start getting in here, cause cois was something I was really great at

221

00:48:09.140 --> 00:48:22.999

Tiffany Charles: and we just weren't. We didn't have a process for onboarding if we had no process on like. Should it still go to Steve? Should it go to that next client like, or the next client advisor? How does that work?

222

00:48:23.000 --> 00:48:42.489

Tiffany Charles: If I would hand off, and they wouldn't close like that was hard. So we just had to really get clear and so we went from this like, let's grow. And that's what I was hired to do to this, like, we need to reevaluate the entire practice and do every aspect to get the operational leverage, because

223

00:48:42.490 --> 00:48:53.129

Tiffany Charles: we need to be aligned and disciplined in order to get to predictable growth and really get that together. So 2,019 through 20, it was



224

00:48:53.360 --> 00:49:08.440

Tiffany Charles: honestly, even up until 2022 it was heavily operational. We started with new vision and values as a firm. We got the team buy in. We created career pathing. We created roles, responsibilities.

225

00:49:08.470 --> 00:49:16.720

Tiffany Charles: We invested in all the tech. There's literally we my

226

00:49:16.780 --> 00:49:46.490

Tiffany Charles: Our CIO is also one of my business partners. And he sent me a list the other day. Ops manual, Redtail, Fidelity or Ryan core Emani new websites Asana y chart, gusto, lattice, guideline, advisory, lastpass, whole list of plan we moved from. We were our own broker dealer like we closed that we that made us have to change broker dealers. So we moved everything, for you know, from park out

227

00:49:46.610 --> 00:50:00.590

Tiffany Charles: and purging over to fidelity that all happened during that timeframe. And as a piece of that we had no processes. So we created an operations manual and anything new that we were implementing, because that's a lot of investment. So you need adoption.

228

00:50:00.670 --> 00:50:15.460

Tiffany Charles: We needed to manage it with the team not to burn them out. We had moments of like real change hangovers and real change resistance. But here we are today. Last year was a very settling year, and now everything is built on

229

00:50:15.460 --> 00:50:37.989

Tiffany Charles: growth, and we're ready for it. And we have no doubt that everything that we just put in play for the last 4 years is about to serve us for maybe the next 1 million of revenue, 2 million of revenue. It's not gonna serve us at our Tenx, or what serving us now at 3.5 million in revenues not gonna serve us at 7 million like we're gonna have to continue to change and adapt and grow

230

00:50:38.140 --> 00:50:45.610

Stephanie Bogan: well on the fact that Tiffany knows that so right clearly in advance? Right? It's that breaking things on purpose that we talk about.

231

00:50:45.740 --> 00:51:00.990

Stephanie Bogan: So they as is you probably caught from that conversation they have gone through an incredible amount of change, and not everyone was invested in all of it at every moment in time. Right? Which just adds an additional burden to leadership.

232

00:51:01.020 --> 00:51:18.360

Stephanie Bogan: Because, right, you're managing the change. And then you're managing potentially negative energy through the change. And there's a lot that goes. I don't know if any of you have those people that say, yes, you know. Yeah. And then when they show up and do it, they're like, Yes, absolutely. I'm on board with this idea

233



00:51:18.400 --> 00:51:39.290

Stephanie Bogan: right, or they can get locked and change fatigue. Right? We've got too many ideas going, or too many shiny ideas that we've started and not finished. And they're like, Okay, here we go again. Tiff. And Jared really had with their team a lot of change fatigue at 1 point, because they had, you know, come in and we're starting to enact all these changes. But they hadn't painted

234

00:51:39.290 --> 00:51:54.279

Stephanie Bogan: the vision and the past. So people just didn't quite under, you know. It was like, why are we changing everything? It works just fine. And that's how teams tend to feel a lot like it worked fine. What's the problem? And the problem in their case, which will be the problem in all of your cases

235

00:51:54.690 --> 00:52:01.560

Stephanie Bogan: is that showing up and doing great work to service your clients is not a scalable business model.

236

00:52:02.620 --> 00:52:24.090

Stephanie Bogan: You have to show up and work with and through people, process and platforms, to create those same caliber of outcomes and experiences independent of you. That's really what scaling the business is about, even if it's just 2 other advisors. And you see, em every day. You're still giving the client and the outcome to them.

237

00:52:24.090 --> 00:52:44.019

Stephanie Bogan: and you wanna have as much as Tiffany pointed out. We'll talk about this at the March leaders retreat like what are the components of a business? You heard a rattle through an awful lot of them that you need to have in place to create that sustainability. You know that it works into perpetuity and scale. You know that it works with growth and that it's in service to the goal, which is, it works without me.

238

00:52:44.360 --> 00:52:51.199

Stephanie Bogan: And that doesn't mean you don't have a role in the firm, Rob, if you're the chief growth right? But Tiffany could replace herself

239

00:52:51.490 --> 00:53:18.639

Stephanie Bogan: if she wanted to, the firm could replace her, and it would still work. One person doesn't bring the wall down, if that makes sense. And again, you might want to work in your firm for the next 15 years and be the pivotal person from A, you know. And that's okay. We just want the system to be built around you that we could bring in another really awesome human to do that job and get the same kind of outcome versus just hoping that that person was a good advisor, and showed up and did good work.

240

00:53:19.100 --> 00:53:23.189

Stephanie Bogan: alright tiff. Your next slide is

241

00:53:23.360 --> 00:53:24.759

Stephanie Bogan: teed up for you.

242



00:53:25.130 --> 00:53:31.530

Tiffany Charles: Yeah. So how did we start this or get aligned?

243

00:53:31.720 --> 00:53:52.089

Tiffany Charles: it starts with Jared and I, we do have a third partner, and possibly a fourth one. Here soon. And so I say, Jared and I, because when it started and we led through all this change, this is really where it lived. And it was very like clear. Jared and I have.

244

00:53:53.940 --> 00:54:10.530

Tiffany Charles: We have a lot of meetings, but we have a monthly strategic meeting that's all day, and that is really important to us. First of all, we can get a lot done and covered in that one day, and it helps us just realign, especially as we're effectively running different parts of the business.

245

00:54:10.560 --> 00:54:20.890

Tiffany Charles: But it had to start with us like we had to be clear cause when we weren't clear what would happen. As I'm so sorry my eye has something in it, and it's just so bad.

246

00:54:21.110 --> 00:54:36.689

Tiffany Charles: But when we weren't clear. Here's what would happen. We would be running these projects more like, we're not clear. It's okay. We'll just step in and do it like, oh, we just got this push back from the team. You know, it's okay. We're gonna make them feel better about it. And we're just, you know, we're feeling

247

00:54:36.690 --> 00:54:51.660

Tiffany Charles: like it. Just it was this constant place of just putting ourselves under more stress and more stress. And then it was this place of like, okay, we're just gonna get this done versus utilizing the team. And so we are like that has to stop you. And I have to be so clear. The other thing we learned

248

00:54:51.740 --> 00:55:18.389

Tiffany Charles: in implementing every aspect of our business was there are things that we did that we did not have to do, and they felt really important we created different models for our portfolios like that was great. It did not have to happen at all during the timeframe. Our clients were highly satisfied with our models and our portfolios like it, didn't. It did not have to happen when other things did.

249

00:55:18.490 --> 00:55:43.309

Tiffany Charles: Jared and I joke, but he got all bent out of shape about like the carpet like this entire, like huge investment on changing the carpet like cause you're just in this mode of. Like everything we need to present this way. We need to do this way, and we're both quick start as most CEOs are so like that slow down is really really important. I have an incentive comp grid that I built in July of last year.

250

00:55:43.520 --> 00:55:57.670

Tiffany Charles: and what I'm trying to do is drive the behaviors of outcomes for our team. We have one in place now, and it feels great for everybody. But it's not necessarily driving the client referrals that I would like to see and or held away asset opportunities. So

251

00:55:57.830 --> 00:56:00.190



Tiffany Charles: I'm like, Okay, we can roll this out.

252

00:56:00.640 --> 00:56:17.540

Tiffany Charles: We have a CEO that'll be coming in. And she's also run aspects of this. And I'm like, okay, the ones working fine right now as much as I would love to motivate those behaviors if I motivate them 6 months down the road, and a much better formula or model, or one or this one's agreed upon. Then that's great.

253

00:56:17.540 --> 00:56:31.999

Tiffany Charles: Here's the rollout. It used to be Jared and I would just roll it out to the team. We've made these decisions. Here we go team that didn't work. We've realized that we as a team, a 12 have to give levels of voice and digest, because not everybody moves at our pace.

254

00:56:32.160 --> 00:56:55.139

Tiffany Charles: So how do we, then? What's our rollout is now very similar. We come up with an idea. We go to the partner meeting. We talk to the partners about it. Partners agree. We roll it out to our lead advisors. They have a meeting on a month or on a weekly basis. It gets seated there. First we get their voice carefully. And then we then take it to the all company.

255

00:56:55.200 --> 00:57:23.479

Tiffany Charles: and we create the project and management around it. That was a very important lesson, because we were like, Hey, we're doing this if the start dates next week. The team really had a hard time with that. So Jared and I, especially if you have business partners that alignment has to be incredibly important. You're on the same page. You're not in front of your team like Waffling, that you're really in a place of supporting one another. And just recognizing the fact that, like

256

00:57:23.840 --> 00:57:24.730

Tiffany Charles: not

257

00:57:24.880 --> 00:57:33.769

Tiffany Charles: moving too fast, that was our really big lesson and and leading change really effectively in our team. We have accomplished a lot.

258

00:57:33.910 --> 00:57:59.630

Tiffany Charles: and we have a very talented team. But it did come at the cost of some burnout of some employees along the way. And maybe they'd be good fits. Maybe they wouldn't. But when you're changing that amount it's it can really end up costing. And so we we've paid a lot of tuition to learn. How do we lead effectively? And just slow things down.

259

00:57:59.630 --> 00:58:21.140

Tiffany Charles: And I'll get into the process. But now, how do we have the team a piece of like even implementing or suggesting ideas or helping understand where they're prioritizing things so that we can do this in a really great way. And that's where, like us, or our launch process, or some communication structure creates clarity member clarity, transparency and accountability.

260

00:58:21.390 --> 00:58:37.460



Stephanie Bogan: because you need to be right, continuously reinforcing those ideas. Right? So you want to make sure that you have assist. Here's the kicker. You will have change in your practice. It's inevitable. Otherwise you would not grow and evolve.

261

00:58:37.770 --> 00:58:52.200

Stephanie Bogan: We need a it's it really does start to get great repetitive. But it's true. We need a system for our time. We need a system and a model for our client, base, etc. We need a system for managing change.

262

00:58:52.520 --> 00:59:16.369

Stephanie Bogan: It does not have to be, you know, a big system with 19 meetings, Tiffany. They have a lot of employees. They're virtual, right? They have quarterly get togethers. It's just what's your simple system for creating clarity, transparency, and accountability with your team at 1 point Tiff and, Jared, I think the coaching advice they gave them was, Go to the team and have the big. We're sorry meeting, like, Hey, we've tried to do this and this and this.

263

00:59:16.410 --> 00:59:44.440

Stephanie Bogan: We all just need to take a breath and get really clear on what we're doing, and why and right, have a beginning and middle and end to projects and give you a runway, and what a lot of users do! And she described it as we spot. Clean the carpet something broke. Stop, fix it. Let's have a meeting. Let's figure out the problem, and it may be an issue to tips point. It might need to be solved near term, long term or both, but we tend to stop completely, shift our attention

264

00:59:44.720 --> 00:59:57.979

Stephanie Bogan: and start this thing when we might say, Hey, you know what? That was not great, but we've accounted for it. Like we'll figure out the referral strategy as it fits into the priority queue. But right now it's not where we most need to spend our energy and attention.

265

00:59:58.140 --> 01:00:10.359

Stephanie Bogan: What teams really love. what we love, we just don't always know how to give it to ourselves is that level of clarity and intentionality. Here's what we're working on. Here's why we're working on it here at the steps we're gonna take

266

01:00:11.080 --> 01:00:21.910

Stephanie Bogan: right? Here's what we're gonna need to do to get across that finish line. So you wanna one for those of you? Right? That if your teams is like great positive energy, it's awesome. You still.

267

01:00:21.930 --> 01:00:23.440

Stephanie Bogan: whether it's like

268

01:00:23.450 --> 01:00:38.070

Stephanie Bogan: they're questioning right? What's limitless? What are you doing? What's this whole thing about? Are they completely on board? Are they in that? Why call the maybe middle leg. I don't know. We'll just wait and see. Or are they like, Oh, God! We're just gonna cross our arms and hope this passes

269



01:00:38.760 --> 01:01:00.259

Stephanie Bogan: right, and that has nothing to do with anything except what we've done to date. Now we have to have what we call the reset meeting. If they're really excited the reset meeting is, we're just so excited. Here's the vision of where we're going, and we're gonna re-engineer each aspect of the practice in a really intentional way to up right to up level what we're doing, and right warm, wonderful, fuzzy things.

270

01:01:00.440 --> 01:01:09.699

Stephanie Bogan: If they're in the maybe middle, then it's hey. This is what we've done. Some of it's worked. Some of it hasn't right. What we're doing now is taking a very intentional step, too.

271

01:01:09.870 --> 01:01:24.929

Stephanie Bogan: Right invest in this program in process to help us. Right? Be more clear, more inform, more intentional, right? If they're like, Hey, like this, right? You're you're gonna know that. And we're gonna have to have one on one meetings, right? Because we need to have that hard to say, like, Hey.

272

01:01:25.530 --> 01:01:44.110

Stephanie Bogan: what do you think it's going to take? What questions do you have? You know? Right, we want to start to break down that resistance on an individual level. You're not usually going to do that in a group meeting. Your team might be a combination of those things tiff and Jared's, were they people that were like great? We love G 2. You're awesome. You're doing things way better. And then we have people who are like, What the hell are you doing?

273

01:01:44.630 --> 01:02:02.360

Stephanie Bogan: Right? So it's not usually like a clear cut and dry what this next level look like. I think this is really just for you to all reflect on where your teams are. What have you communicated to them to date. Have you communicated? Here's what we're doing. Here's why we're doing it just with regard to limitless.

274

01:02:02.860 --> 01:02:19.389

Stephanie Bogan: When you get the vision. What's your process for doing that. The the limitless question, by way, is just a good indicator of your natural communication and leadership style. If you haven't sat your team down and said, Hey, by the way, we're doing this thing. And here's why that's an area you can work on, because we always want to start painting the picture

275

01:02:19.810 --> 01:02:29.950

Stephanie Bogan: when we start like throwing tasks at people, and they don't know what's in the picture. They're just like, I don't understand what's happening. Why and what do you know about how people's brains typically respond to not knowing.

276

01:02:31.150 --> 01:02:33.320

Stephanie Bogan: not knowing usually means not liking.

277

01:02:34.460 --> 01:02:50.409

Stephanie Bogan: It's more work. I don't know why I'm getting it right? So again, it doesn't have to be 19 team meetings. It's have we gotten clear? And then tiff will talk about like transparency and accountability on the other side of that step one is, are you and your team aligned in that clarity



278

01:02:50.580 --> 01:02:58.609

Stephanie Bogan: that goes really nicely with that right goal for the quarter to create vision clarity and end up with a one page plan that you can and will share with your team.

279

01:03:00.340 --> 01:03:23.130

Tiffany Charles: Yeah, and that it is it is we created our internal, we redid our missions and visions. But like we created an internal mission of creating an environment where talented people can thrive and like we use that as a measurement every single time. And we're talking to our team about it. But interesting enough, like you get pushed back on we went to unlimited Pto and flex Fridays

280

01:03:23.780 --> 01:03:46.050

Tiffany Charles: few years back. It was prior to Covid, but we we had resistance on that and you're like I. And so it's just those things we're like feels like. This is a benefit that everyone's been asking for or we have personal agency, you know, like we're we're trying to remove that you're like, Hey, I'm running to the doctors. But I promise I'll make up those hour at 60'clock tonight.

281

01:03:46.440 --> 01:04:05.810

Tiffany Charles: That's not the track that's not environment. We're looking to run but there was. It was uncomfortable like, oh, that's change. I don't know. I don't know how to do that. I don't know how to effectively manage my time. Will I have the permission to truly take that time off. Okay, well, I've been here 15 years. Why does somebody new get the mass same amount of time off that? I do. And you're just like, Wow, okay.

282

01:04:05.890 --> 01:04:26.190

Tiffany Charles: we have to have a process for everything to communicate any change that we're making as a team cause I just thought like this is going to be like a total buy in. Everyone's gonna feel great about this and it wasn't we have personal agency as a core value. And it turns out not a lot of people know how to be successful

283

01:04:26.190 --> 01:04:40.959

Tiffany Charles: in having agency and actually owning their time and outcomes and responsibilities like structure, was really important to employees. So we had to train on how we can create structure for them to be successful and also having agency. So just some interesting.

284

01:04:41.080 --> 01:04:53.569

Tiffany Charles: it's there. But creating alignment and investment. I was just gonna put in the chat. Some pieces that Jared and I are looking at and you can. You can go to the next slide stuff.

285

01:04:55.430 --> 01:05:00.559

Tiffany Charles: And I didn't know if I hit all 8 yet, but I'll just send it, and if I did or I didn't

286

01:05:00.910 --> 01:05:24.910

Tiffany Charles: But we, Jared and I look at our business in in really, through the lens of like 3 core areas, keep capture and compete. So like, keep really falling in under like those. You know what the promises that we make to our clients? And our team right like, how are we really fulfilling all of those pieces, so



you can have advice and client, and then capture is what

287

01:05:24.910 --> 01:05:47.379

Tiffany Charles: my key role should be like. How are we going and capturing opportunities as a firm and growing as a firm, and then compete like, how are we? How are we staying in this business? How is this business evolving. What does that look like? Are we managing those things right? So like we were not competitive when we didn't have a Crm right effective

288

01:05:47.380 --> 01:05:51.640

Tiffany Charles: tools. And we? And we measure through efficiency, effectiveness, and risk.

289

01:05:51.740 --> 01:06:07.729

Tiffany Charles: So what are our singular like? What could be singular? Failure points to our team, like, you know, are our employment agreements off, you know, are those gonna help us or those can a advisor leave and take all of our clients? You know, how does that work?

290

01:06:07.730 --> 01:06:25.749

Tiffany Charles: And efficiency like, how's our time being spent compared to benchmarks? And you know, we do we believe those benchmarks? What's our philosophy around those things. And then we run the business in 8 core areas. Business strategy, client experience.

291

01:06:25.820 --> 01:06:50.460

Tiffany Charles: legal compliance, security investment and financial planning, growth and marketing culture and people technology. But we used happened as like any decision we make can affect any of those areas. So if we can just quickly look through a pro, run, a project through a lens of like, how what does this do, or how does it impact that area? It helps us build real quick and understand how we're gonna navigate conversations.

292

01:06:50.770 --> 01:06:58.039

Tiffany Charles: So as Jared and I are looking at that, we bring it to the partner meeting. we do a partner meeting once a month.

293

01:06:58.060 --> 01:07:24.489

Tiffany Charles: And honestly, it's a little bit of a leadership meeting, too, with a new Co that'll change. The partner meeting really should be on value creation in our perspective of the business. So what are we doing to create value and equity within the business? And as we're all invested in the business. What is that looking at so like, are we gonna acquire that Cpa practice? How do we feel about opening another office location like.

294

01:07:24.490 --> 01:07:42.700

Tiffany Charles: what does that look like? So those types of things? I, are things that we're looking at making sure that we are clear on value, methodology, evaluation, methodology, all of those pieces. However, they are being run as leadership right now as well. So we get clear on that.

295

01:07:43.140 --> 01:07:49.199

Tiffany Charles: We then take quarterly meetings with the team to work on the business.



296

01:07:49.240 --> 01:07:56.789

Tiffany Charles: Our team is across the country, so we do 2 in person every year, and then we do 2 that are virtual

297

01:07:56.870 --> 01:08:24.209

Tiffany Charles: in these meetings. It is 2 and a half days of working as a team together, and we have breakout sessions. So this is where we really get the team's input, and they start creating their own kpis, their own goals, their own projects. We start with the Town Hall firm. What is the firm's goals? What direction are we going, and help them start understanding? There's a CEO question that Jared comes up

298

01:08:24.270 --> 01:08:42.100

Tiffany Charles: with every one of those breakouts, so that they know what lens to look at through what they should be studying, because he's working so closely with everybody in the firm. What should they be focused on? Right, hey? It seems as though in client onboarding for our client. Ops team.

299

01:08:42.100 --> 01:09:02.630

Tiffany Charles: that's rolling over some of those accounts is seemingly taking 3 to 4 months. What's one thing that we could do to speed that up like? That's a really good idea, because that they can now sit on in that meeting and talk through those pieces, because while they're doing it day to day, they're not thinking this is ineffective. Right? Like we're measuring inefficiencies.

300

01:09:02.630 --> 01:09:22.199

Tiffany Charles: They're just trying to get the job done. And if that comes 2 months from now or 3 months from now, or 4 months from now, they might feel fine about that. But as a firm. If we're looking to be one of the best out in servicing and compete and do certain things. We wanna adhere to a certain level standard. And of course, we wanna move those assets.

301

01:09:22.200 --> 01:09:38.270

Tiffany Charles: So how do we do that in a faster way. Right? Just the thing I want to call out there. You all will hear me talk about it throughout the year, especially when we talk about teams is involvement equals investment or a much higher likelihood. So whether you have 2 people or 28,

302

01:09:38.689 --> 01:09:52.399

Stephanie Bogan: if you just go go do this, or here's what we're doing. It feels unilateral or one way. How would you feel in that situation? And and again, I've had owners say to me, well, they have nothing to do with it. I'm paying them, and what's the difference? And I said, Well.

303

01:09:52.880 --> 01:10:05.179

Stephanie Bogan: you can pay for someone's head, but in hands you can't necessarily pay for their heart. Right? When you have people that are engaged and motivated invested right? You you absolutely get more contribution and impact from the business.

304

01:10:05.270 --> 01:10:14.149

Stephanie Bogan: So what you what I hope you notice in there was, Tiffany was saying. We talked with



the team. We have breakouts.

305

01:10:14.230 --> 01:10:39.720

Stephanie Bogan: You probably most of you don't have enough people to have a breakout, and that's totally okay. The takeaway. There is notice similar to things. You've heard other places. If you start to connect the dots. I'm a big fan of asking people better questions, because when you ask better questions you get better answers. Orders are not questions. You don't get feedback. If you don't get feedback, you don't know what you're missing. You don't know what their issues are, and you don't get investment. I started at the bottom of a firm like tiff, like

306

01:10:39.880 --> 01:11:06.250

Stephanie Bogan: I used to know I'd be like, why didn't anyone ask like, why won't anyone listen to me? If we just do this, it would be so much better. But no one bothered to ask, and when I tried to tell people they didn't seem to care, and it was like, why, I'm the person in the we. When we do audits on firms, we right we go in, and the first thing I do is talk with people on the team and in the span of a day. I can tell you everything about that firm, what they need, what they don't need, where the leader has issues where the team has issues where their Ops breakdowns are.

307

01:11:06.260 --> 01:11:17.680

Stephanie Bogan: So the goal is to really surface all of that investment. And by the way the knowledge and the bandwidth that's behind it and Tiff asked questions like they. They set out a situation.

308

01:11:17.980 --> 01:11:29.650

Stephanie Bogan: and they gave them what I call an ask or resolve. Here's where we're at on this notice, no judgment, just an observation. And here's the goal that we want to create. What's great better question. What's one thing

309

01:11:30.310 --> 01:11:39.580

Stephanie Bogan: right? Cause it's focused and they keep they can't get lost in it. They are then tasked with going off, and they have to think and engage and become part of the solution.

310

01:11:39.610 --> 01:11:50.750

Stephanie Bogan: Ryan, when we talked with you and Ron last year about implementing some of the changes we talked about right having like a bi weekly meeting with the people working on it, giving direction and then saying, Go do that

311

01:11:50.750 --> 01:12:11.239

Stephanie Bogan: come back in 2 weeks, right? We wanna we wanna be involved, but we want them doing the legwork, and then they bring the questions back where it could be once a week. What Chris could say to her team like, Okay, what questions do you have here? Capture the service model we're doing now, here's the worksheet. Bring it back next week. We'll talk through it. Brainstorm on the board. I want you to go update it after that.

312

01:12:11.430 --> 01:12:21.470

Stephanie Bogan: Come back. Notice. Chris, in this example is directing Tiffany and Jared have learned to direct their sharing responsibility for the outcome.



313

01:12:21.700 --> 01:12:23.120

Stephanie Bogan: That's investment.

314

01:12:23.570 --> 01:12:35.469

Stephanie Bogan: So think about the challenge. Here is, even if you don't have 25 people on your team. Think about ways, something you're working on, or want to work on, where you could shift your leadership style to more collaborative.

315

01:12:35.480 --> 01:12:56.810

Stephanie Bogan: no different than clients right than directive where it's I love the Town Hall like when I do strategic planning retreats with team first questions going before the retreat. By the way, are, what are all right. What are the breakdowns in the business? So we know right where to focus some of that energy, and then we can send people off into breakouts, even if they cannot solve the problem.

316

01:12:56.810 --> 01:13:08.860

Stephanie Bogan: The point is they get to be part of the solution, so that when you do finally hand over the the answer. They feel connected and responsible for helping ensure that it's successful, Rob, if I'm on the team

317

01:13:08.970 --> 01:13:13.319

Stephanie Bogan: and I'm the weakest link on the football team and we win the Super bowl. Do I still get the ring?

318

01:13:14.240 --> 01:13:16.439

robertwyrick: Yep, still get to celebrate?

319

01:13:16.480 --> 01:13:23.609

Stephanie Bogan: Yes, we do right. When people want to see something succeed when they're a part of it.

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01:13:23.650 --> 01:13:43.479

Stephanie Bogan: If your team is re, if you've got any of that resistance, the first thing to do is engage the people that have resistance, so you can see right what it is and how to work through it. So tiff, I just you do it so naturally, I wanted to call that out to. Everyone is asking questions like, one of our clients. Year 2, I think, wanted to be gone 6 months

321

01:13:43.480 --> 01:13:55.800

Stephanie Bogan: of the year, and he was not sure his team was going to be on board with that. So I said, Okay, well, let's just ask him what it will take. And he said, Hey, I have this really big goal of getting this business to run so well, I can be right out of it for 6 months of the year, and

322

01:13:56.020 --> 01:14:16.480

Stephanie Bogan: that would mean that we could this and this. And you guys would have autonomy if I was there right. And you'd really own your roles and the results. And my challenge to you is like, let's have a meeting and brainstorm. What it will take. what's gonna get in the way, what are you as well?



Well, how are we gonna reach you? Right? So they ultimately ended up on a plan where at any moment, no matter where in the world he was, he would be able to be home within 27 h. They checked all the

323

01:14:16.890 --> 01:14:22.069

Stephanie Bogan: do you guys feel good about that? Yes, like, even if the market crashes, I have a phone.

324

01:14:22.330 --> 01:14:35.540

Stephanie Bogan: And then they literally were like, What if you're off in this part of the world? And he's like, I'll get a sat phone. So when he was off in remote parts of the world, he literally got a sat phone. Everything that they came up with is a resistance point

325

01:14:35.610 --> 01:14:46.539

Stephanie Bogan: they got to solve for it together, and then you know what started to happen after just a little bit. The team was like, well, we could this or we could this or that's not a big deal, because now they were invested in getting him to the goal.

326

01:14:47.090 --> 01:15:01.150

Stephanie Bogan: So just an example of how you can use questions and intentional space in meetings or monthly meetings, or just getting together for lunch and being like, Hey, we're buying pizza. We got a good question we need to answer as a business. Why is this onboarding thing backing us up so much

327

01:15:01.550 --> 01:15:08.260

Stephanie Bogan: right. Those conversations are really powerful, getting clear on the problem, getting investment and getting on a path to changing it.

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01:15:08.750 --> 01:15:23.740

Stephanie Bogan: Sorry if I didn't mean to interrupt there. But I just think it's a really important point, the way that you engage the team really shifted from we gotta do this, or we already started this to hey, pause, reflection, consciousness, engagement.

329

01:15:23.900 --> 01:15:38.350

Stephanie Bogan: right getting them on board, and then it skip clear, get focused, and then get to work, not get to work, and then deal with the confusion and then go get your team clear and focus, which is what we tend to do when we have a problem, we go. Oh, we gotta have a meeting and fix it.

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01:15:38.900 --> 01:15:41.220

Tiffany Charles: Yeah. And this process like it.

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01:15:41.500 --> 01:16:08.760

Tiffany Charles: It has evolved so much over the last 2 years to really get our team to buy in. To Steph's point, like accountability was a real big issue for us, like Jared and I just kept stepping in and be like, it's okay. We'll solve it. It's okay. We'll do it. But that really prevents growth. Like, that's where my focus needs to be. And Jared needs to be focused on getting the team to that next level so that he can focus as a CEO to the firm as well as be with our our top clients, because when he's thinking that way.



332

01:16:08.760 --> 01:16:27.679

Tiffany Charles: We just have massive opportunity as a firm. But we started like with a team's chat with that was called Breakdown and Band-aids. Again, team feedback. They didn't just like the breakdown chat like it. Felt like they were admitting that something was wrong. So we were also like, What do you feel like you're putting Band-aids in. And it was just like an anonymous form that you can send in and be like.

333

01:16:27.780 --> 01:16:47.160

Tiffany Charles: Oh, my gosh! Like I've been meaning to tell us that, like our phone line is coming in from Sedalia, and we live in Golden. And that's that come up 3 times for clients like, can we have that fits? So it doesn't necessarily just like while you're in your day to day. If there's something that you feel like, you're constantly band dating like, how do we get to that voice?

334

01:16:47.160 --> 01:17:02.339

Tiffany Charles: And then how do we upload like, hey? I heard you. You were able to speak, and you didn't have to take it on right like, it's not always your responsibility. We have a team and then we got to this breakout where we're like we do so much better when we take time to work on the firm

335

01:17:02.340 --> 01:17:31.709

Tiffany Charles: and the team. What if we gave our team the permission to work on their seats and their team, and then work towards the greater good. And so you can see, I put some examples in of questions that Jared's asking those teams, hey? Financial planning team? How should we conduct an ongoing professional education and training as we move from creating standards to reinforcing them? So we now have established how we approach Roth conversions, or how we approach insurance, or how we approach. You know, whatever it could be.

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01:17:31.720 --> 01:17:41.799

Now, what does that look like for ongoing training and adherence to the things that we've put in place, that we've worked so hard for in as a part of these breakouts as well.

337

01:17:41.860 --> 01:17:43.630

They set no more.

338

01:17:43.750 --> 01:17:45.539

Tiffany Charles: Then 3 projects.

339

01:17:46.050 --> 01:18:08.040

Tiffany Charles: I really push for them just to do one or 2 a quarter and no more than 2 processes. So we really want to be in a place that nothing is just living in people's heads. So the processes start on like word documents. We're now working towards the technology wiki pieces of our Ops manual. Now that we have like over 150 processes or something like that.

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01:18:08.080 --> 01:18:28.139

Tiffany Charles: but it started nothing like how we just start documenting what we're doing and stop building from scratch as a team. And so these this week is really important. We socially connect while we're in person. So we try to connect and adhere to the culture. We come together and do education,



and then they get these breakouts

341

01:18:28.270 --> 01:18:30.310

Tiffany Charles: the very first time we did it.

342

01:18:30.520 --> 01:18:45.620

Tiffany Charles: I think we're a team of 12. I think there was like 75 projects and processes that everyone thought they were going to get done in a quarter. And I was like I wrote, I reviewed it, and I was like, this is never gonna happen, Jared, should I go back to the team? And he was like, No.

343

01:18:46.060 --> 01:18:59.340

Tiffany Charles: let us just go through it. So we hit 50, which okay, I'm super happy. They're worried cause they didn't hit it. And I was like, no, this is the process of learning how to truly start taking.

344

01:18:59.570 --> 01:19:26.129

Tiffany Charles: Yeah, you. Of course you weren't. You were going into surge. And you thought you were, gonna do these 5 massive projects like that was never gonna happen. So it started helping our team understand? Like, how can I actually get to the things that I need to while like setting this in in a great way? And then how do we fix these pieces? And a lot of times like, you know, the question is, is, you just had a surge like, did you have time to reflect on what went well and what didn't

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01:19:26.370 --> 01:19:34.860

Tiffany Charles: like. Where do we find that time? And how do we then create a process to ensure the next time it's even better. And we're not just in and like

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01:19:35.260 --> 01:19:49.520

Tiffany Charles: just in our day to day. So we take those pieces. They set their goals. We then have team meetings on a weekly basis. So our lead advisor team meets with Jared every Monday. We have an all company

347

01:19:49.520 --> 01:20:11.439

Tiffany Charles: every week. All hands on deck that reflects our entire stuff to your point, our mission and our vision right? We do a wellbeing connection at the beginning. It's the only time the entire week that all 12 of us see each other and can connect as humans, and we tend to be more thoughtful and grateful when we see each other and connect. So we have the wellbeing connection upfront

348

01:20:11.910 --> 01:20:18.929

Tiffany Charles: we hit. Calendar growth is the next piece, because that's where we're highly focused as a firm. So ensuring full

349

01:20:18.970 --> 01:20:38.659

Tiffany Charles: full transparency. There! E! Those 8 categories. We hit every piece of that in that meeting. If anything is coming up in there, really encourage our client teams to share what's happening like we want them to get used to case studying out loud. Because that brings everybody on our team to the mission of the Why do we do what we do.



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01:20:38.660 --> 01:20:52.270

Tiffany Charles: you know? So we we keep encouraging those pieces. And then they have one to one meetings as teams as well, so lead advisors should have one to one meetings weekly with their associates. I have one to one meetings with my growth team.

351

01:20:52.360 --> 01:21:04.940

Tiffany Charles: and and then Jared hasn't bi-weekly with firm off. So every other week and that all company meeting is, as I mentioned, just really important, but so we set it. Jared and I said it.

352

01:21:05.060 --> 01:21:21.919

Tiffany Charles: It then goes to partners at a quarterly or on a quarterly level or big strategic planning. Then partners for a monthly level. It goes to the team at a quarterly level, and then on a monthly level, and then on a weekly level and what we found is, we're we're just.

353

01:21:22.090 --> 01:21:34.730

Tiffany Charles: The team is really happy. Things are getting done quick. And so much more effective. All of it's transparent. So it's become much easier where in the beginning, I think people feared.

354

01:21:34.850 --> 01:21:52.300

Tiffany Charles: seen their work more visible to the entire team. We're finding that that's not the case. That everyone is just like I love seeing what they're working on makes me appreciate their position even more. I understand who I can go to there. So it's actually fostered collaboration. We're seeing more people take time off

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01:21:52.390 --> 01:22:02.280

Tiffany Charles: our clients. We have a 99% retention. And last year was our biggest quarter since I've come on in 2,018, and we're queued up to

356

01:22:02.330 --> 01:22:17.859

Tiffany Charles: blow that out of the water currently. So and like the team. Just. We have the operational leverage. We have the open lines of communication. We have the capacity, and and we're adhering to full personal agency. Our advisors, or

357

01:22:17.920 --> 01:22:29.959

Tiffany Charles: healthy and happy humans, which is super important when they're sitting in a seat to deliver advice. And finally, we all are like there's not with the exception of our marketing and growth, because we had to set that down

358

01:22:29.980 --> 01:22:34.400

Tiffany Charles: while I went into a coo role for a couple of years. But

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01:22:34.410 --> 01:23:00.589

Tiffany Charles: M, almost nothing at this point is like, build from scratch, like we're starting to just get into that like, Oh, that, yeah, our team can really feel that. And so, as you can hear in that journey, though it's like it, it started ineffective, and we just kept to with it, and we kept building upon it. Those



CEO questions didn't exist at first. It was like, just reflect on your last quarter. How did your project management go?

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01:23:00.590 --> 01:23:16.059

Tiffany Charles: Want you guys to learn how to talk about that openly. And Jared and I very much like, Hey, just to let you know. I thought this was gonna be a 3 month project, and it's not I highly overshot that for me. It's a 6 month project to a 9 month.

361

01:23:16.120 --> 01:23:32.949

Tiffany Charles: Well, here's why. So I want them to understand like that. We're all human and doing this. But as that contribution and that clarity in each one of those business lines, it's just really, we've gotten a high level of effectiveness and efficiency.

362

01:23:32.980 --> 01:23:51.669

Tiffany Charles: And we, I would say that we're really low, risk our employment. Our employee. Satisfaction surveys and team interviews are coming back real high. Our clients are really happy. Which was really scary for us for a while. Steve was supposed to be us with us for 7,

363

01:23:52.100 --> 01:24:15.099

Tiffany Charles: 7 years, starting in 2,020, and first in 2,019, and we literally marketed all of that out in 2,020 hit. He's like this is where my career is over like this is not how I want to connect. And so we were like, you know, just the panic of like clients. And we don't have these things in place, and we just kind of just to be where we were to where we are today.

364

01:24:15.290 --> 01:24:19.389

Tiffany Charles: Is a really fascinating story, but this

365

01:24:19.470 --> 01:24:28.359

Tiffany Charles: learning how to effectively utilize our team and empower each seat was is probably where we've gained

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01:24:28.470 --> 01:24:54.299

Tiffany Charles: the most momentum, and, like we are, probably we're able to take on probably another 50 households without hiring. We have clear forecasting. We have clear data. We have all the ways to support the team in a really great way, and they have voice in it, but even better, they have accountability. And there's some things that Jared and I just don't even touch anymore. And that just wasn't the case for years.

367

01:24:54.390 --> 01:25:04.379

Stephanie Bogan: So the the encouraging statement in there is right 3, and especially 5. But even 3 years ago all that was not true. And look where they are now, which just tells you what's possible

368

01:25:04.520 --> 01:25:26.859

Stephanie Bogan: with 3 years of intention. I actually, I don't know. I remember vividly a couple of conversations with you and Jared over the years like those inflection points, and this was one of them, and I remember the conversation was something around like you have managers who aren't performing,



and your response to that is to do the work for them. Why would they step up and perform?

369

01:25:27.120 --> 01:25:38.259

Stephanie Bogan: Why, why would they do that like you're so willing to do the work for them and take it on. And so we all have this tendency to do that. So that's where that shared responsibility and investment. It's just

370

01:25:38.560 --> 01:25:47.450

Stephanie Bogan: There's no assignment here. It's just an opportunity to really look at Tiffany and Jared's experience and ask yourself, right, how are we leading through change?

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01:25:47.800 --> 01:25:59.040

Stephanie Bogan: What? Where are their opportunities to up level that you know inspirationally, culturally, systematically. What you'll notice here is, there's a model and a system for everything.

372

01:25:59.490 --> 01:26:10.740

Stephanie Bogan: even the process of right managing performance and change. Because when we do that, we make it so much more predictable, we're taking the unpredictable and making it predictable.

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01:26:10.760 --> 01:26:21.139

Stephanie Bogan: And if you can do that, you you avoid this right? The highs, like we get all around something, and then we gotta take a break, and then we like it. Just it kinda evens out and you get a consistent flywheel

374

01:26:21.190 --> 01:26:30.999

Stephanie Bogan: of progress. And the number one thing people want to do when they call us, particularly when leaders or private clients call me is they want to grow. People call me just. They want scalable growth. It's what we do.

375

01:26:31.920 --> 01:26:39.349

Stephanie Bogan: But starting with growth. Right? If we go from go to grow, we end up at oh, no, every single time.

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01:26:39.820 --> 01:26:53.690

Stephanie Bogan: Right? So there's that space between go and grow. That's what you're doing here this year is really thinking about how and what gaps do you need to fill to? That's where Tiffan and Jared Tiffin. Jared really hit the walls. They realized, oh.

377

01:26:53.690 --> 01:27:13.119

Stephanie Bogan: all that stuff that Stephanie says about putting the cart. But like, do you want to double your revenue? Yes. Do you want to double your headaches, your team, your profit like? No, we want all of that to get better. Well, we're not gonna grow our way out of those problems. And so that's why you can and should start thinking about growth now. But I want you to think about it through the lens of

378



01:27:13.120 --> 01:27:33.630

Stephanie Bogan: right. There's a difference between using this example. A Steve run shop and a sustainable, scalable business. And then what tiff and Jared are ultimately moving into right is just a larger, firm enterprise, regional right as they, if they, as they move up that food chain into her point every few 1 million dollars in revenue. Guess what they're going to be doing. They're gonna go back and break things on purpose.

379

01:27:33.630 --> 01:27:47.389

Stephanie Bogan: You're constantly in leadership, just revisiting the people, the process and the platforms and figuring out where you need upgrades. And how do you facilitate them? That just becomes the job? Alright. What question do you guys have questions for Tiffany.

380

01:27:47.500 --> 01:27:52.139

Stephanie Bogan: We have a few minutes. I've got a couple of things I want to go through, but I want to give you a chance to pick her brain.

381

01:27:52.510 --> 01:28:01.840

kevin: I have a question, Tiffany. Thank you. Great, great information. What's the first upgrade like you made to put the team in position to grow.

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01:28:02.830 --> 01:28:05.500

Tiffany Charles: Oh, that's such a good question.

383

01:28:08.750 --> 01:28:13.520

Tiffany Charles: The first upgrade we made to get the team to grow. Oh, God,

384

01:28:15.650 --> 01:28:16.770

Tiffany Charles: I

385

01:28:17.430 --> 01:28:23.230

kevin: it can be even like you're just your first change you made to get you going in that direction.

386

01:28:23.410 --> 01:28:27.049

Tiffany Charles: I'm like,

387

01:28:27.580 --> 01:28:45.229

Tiffany Charles: you know, we selected a niche. I would tell you that was out of order just because we had things we really needed to focus on internally. but we did do that early on. I believed in the limitless way, and we picked our entrepreneurial niche. Fairly quickly.

388

01:28:45.470 --> 01:28:47.119

Tiffany Charles: I don't know that that like

389

01:28:47.170 --> 01:29:07.790



Tiffany Charles: help us grow faster. It created opportunities that magnified all the areas we would break faster. In the beginning. To tell you the truth, because our operations just didn't support quite yet the ability to manage like a ton of new clients. But I think for the team.

390

01:29:07.880 --> 01:29:09.239

Tiffany Charles: me think like.

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01:29:11.900 --> 01:29:18.660

Tiffany Charles: you know, for for our team it's like consistently like growth is exciting when when

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01:29:18.860 --> 01:29:27.380

Tiffany Charles: capacity is managed in a healthy way. So we've realized that. And we do a lot to like be in tuned to

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01:29:27.490 --> 01:29:55.820

Tiffany Charles: the capacity they have the inefficiencies that exist. How can we solve those? Because as long as they're feeling and flow like we then get the growth through all of it. If that makes sense but like those were like consistle is, if they felt overwhelmed. Yeah, I remember you guys had the heart to heart with everyone you implemented right? The launchos type process.

394

01:29:55.850 --> 01:30:10.699

Stephanie Bogan: obviously picked the niche and I remember it very much to what Tiffany saying. It's that the March summit, the right sizing your client base, really looking at the clients they had relative to the team, the advisor team, and the capacity they had.

395

01:30:10.750 --> 01:30:17.640

Stephanie Bogan: I don't know if you right, like, we had to just figure out like, do we have? What are those 4 questions you always ask? If right people right process.

396

01:30:18.060 --> 01:30:25.160

Tiffany Charles: Yeah, is it the Write? It's no process.

397

01:30:25.300 --> 01:30:46.279

Tiffany Charles: bad process, no training, right or limited training, wrong person and wrong seat, wrong person. And we try to do it in that order. So cause it's really easy as a CEO to, or a owner to just be like this person is not performing and so like what we've learned is like, Well, why aren't they performing? Is there a clear process for that? Were they trained on it? Those types of things.

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01:30:46.520 --> 01:30:52.839

Tiffany Charles: But yeah, there, if they the capacity was really the big thing, I think there Kevin is. And and a lot of that came from like.

399

01:30:53.180 --> 01:31:21.899

Tiffany Charles: So like for me, I'm instantly looking at the data. So I'm like the industry says, and this is crazy. And I'll get all fired up with Derek, yeah, the capacity piece led to some of the projects. And then



that led to. I think it was the meeting in Denver where you guys were talking about diamond teams, and I was like, let's back up that truck just a little bit. And then we ended up kind of shifting your org chart. And I think that was really where the team piece started to really come together for you guys.

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01:31:22.020 --> 01:31:24.829

Tiffany Charles: at least from my vantage point.

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01:31:24.870 --> 01:31:27.579

Tiffany Charles: Yeah, which then started with planning service model.

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01:31:27.710 --> 01:31:35.110

kevin: So it sounds like, you know, I wanna take up much of time. You you change roles a little bit in the company rather than go out and hire.

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01:31:35.350 --> 01:31:37.690

kevin: I did.

404

01:31:37.730 --> 01:32:01.649

Tiffany Charles: I did. Honestly. I've told Jared this, and we've talked about it. If we go back and look like, because I've been in the industry for so long and sat in so many seats like that was an option like I can sit in full on biz dev. I can sit in sales. I can sit in client, advisor seat. I can sit in full operations and compliance, and all those things. It's not what I was hired to

405

01:32:01.840 --> 01:32:26.709

Tiffany Charles: be doing. However, like our firm, just wasn't growth ready, like you? Ha! Like we had to get to client service models to understand why we were having capacity issues with our team when it didn't match the benchmarks. Right? So it was very clear, like we were over servicing in a really big way. And when I say over servicing, I just mean, like we're digging into things that were like the value trade off there. And we really needed to create process around

406

01:32:26.710 --> 01:32:32.449

like, well, how do we not continue to have these things and get more effective and efficient every year?

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01:32:32.450 --> 01:32:33.970

Tiffany Charles: So yes.

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01:32:34.210 --> 01:32:39.000

Tiffany Charles: I ended up chameleon into a lot of different roles.

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01:32:39.080 --> 01:32:43.680

Tiffany Charles: So did Jared. In order to get to where we are today.

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01:32:44.400 --> 01:32:57.460

Tiffany Charles: Both of us have learned to ask better questions. To help us understand like what those



needs are. But yeah, it was I ended up like we had a very clear conversation of like setting growth down.

411

01:32:57.480 --> 01:33:09.959

Tiffany Charles: slowing down to speed up. And it was like. if we're going to do this I'm gonna need to sit in Co seat, and we're just gonna have to set that down for a period of time.

412

01:33:10.190 --> 01:33:27.420

Tiffany Charles: And that's the decision that we made. Yeah. And I think that's you know, to Kevin's Point, I think that's aligning resources where the need is greatest. If tiff had been your typical Cgos she wouldn't have been able to do that. She just has a very diverse background which makes her a great partner to have

413

01:33:27.420 --> 01:33:49.920

Stephanie Bogan: but we'll talk a lot more about this at the march. Retreat around right? What are the elements in your business structure in particular, around your team, leverage them to grow. And, Kevin for you. Right? It's teams and and capacity and profitability that are gonna be the big deal. And the good news is that's true for all of you. And that's what we're doing over the next couple of months.

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01:33:50.020 --> 01:33:53.209

Stephanie Bogan: yeah, we just we have to start making sure the income engine

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01:33:53.230 --> 01:34:20.550

Stephanie Bogan: that you've got right the gas you're putting in the car. We we need to analyze that gas and get a sense of how it's performing. And then to Tiffany's point we look at what clients we want to grow with right in that client base, what's really working. And then we start, we can get clarity around, hey? Do we? Right? Do we want to differentiate specializer niche to improve these? Do we? Right? And then, once you're clear on the client model and the profitability. Then it's all just mechanics of staffing operations and growth

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01:34:20.570 --> 01:34:47.630

Stephanie Bogan: which will go through in a way that you'll remember when we get together in March. But that's the general idea. Right? Get clear on the vision. Then get clear on the client model. Right? Size that client. Basic clear on your growth client, right. You might have container clients once that you're keeping. But that doesn't mean that's who you're growing. You might be growing the same. So that's what comes out of that analysis which we're all set to do in April. If I recall the schedule correctly.

417

01:34:48.020 --> 01:35:11.730

Stephanie Bogan: so I think Tiffany just gives a really big overview like they did, you know. 1015 years worth of change in like 3 and 5, if you can't right. Karen's Jared's a little bit of time before he had Tiffany join. And that's a lot of change to a Co. Incorporate in that short period of time. So they also will tell you right. They? They hustle a lot, and they fortunately had limitless, and we had a coaching rate. But

418

01:35:11.770 --> 01:35:31.250

Stephanie Bogan: but right, they were unwinding a lot of stuff that was there from a legacy, you will be to a point. It just rate it hopefully won't be quite that intense for you, right? Because you are the ones for the most part, who have created your firms. So this is where we come back to those questions right? If I ask Tiffany and Jared.



419

01:35:31.250 --> 01:35:46.370

Stephanie Bogan: do you have a clear and compelling vision, they would say, yes, their team would say Yes, if we said, You know, do you have happy, high performing habits as leaders. Yes, Jared's gonna come month after next or so. He's just so disciplined and like

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01:35:46.370 --> 01:36:07.520

Stephanie Bogan: he's just got his life wired his business like. So he's gonna come, talk about how he implemented the happy high performing habits. Piece of this equation? And then what are your accountability systems? Right? How are you holding yourself, your business and your team accountable. And if you think about what we've covered in the last 30 days.

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01:36:07.520 --> 01:36:20.249

Stephanie Bogan: we've actually covered that right vision and your this process, the launch process and or your month your partner check ins, or how you're gonna hold yourself accountable. The success shifter, or some version of that is how you hold yourself daily

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01:36:20.470 --> 01:36:35.340

Stephanie Bogan: right indoor weekly. We'll talk about weekly check-ins. So the idea here is, I actually took right these 3 lessons and just built the Summit Action plan for those lessons at the high level. So if you're having any difficulty whatsoever, we did it for you.

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01:36:36.540 --> 01:36:47.379

Stephanie Bogan: so yours might be a little bit different this quarter. But right mindset vision and time are really the places where we're focused as we've been talking about. This is what we'll ultimately end up with

424

01:36:47.810 --> 01:37:05.849

Stephanie Bogan: by the end of the quarter. The goal is to clarify your vision. So you've got a big why, a vision of your model, practice a one page business plan right to lead and guide you in the team. We'll talk with you a little bit more about a limitless life book. One of our lifestyle members took all the different components and put them into a book

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01:37:05.850 --> 01:37:28.380

Stephanie Bogan: that he looks at once a week. And by book. I just mean right, he made a Pdf, so I'm gonna send that out to you guys and we'll talk a little bit more about that over this quarter, so that'll make a little bit more sense, but he looks at that every week, and it reinforces the clients. He's working with his 3 priorities for the year his weekly schedule like, if you look at it every single week, your brain just naturally wants and needs to orient to that

426

01:37:28.400 --> 01:37:43.080

Stephanie Bogan: for personal habits. Right? It's having some daily practice getting we call elevating your email. I ultimately want to get you down to 2 times a day, and we're delegating it. And then that weekly check-in that we'll talk about oops. I skipped ahead

427

01:37:43.090 --> 01:38:10.039



Stephanie Bogan: and then the accountability systems. We're gonna talk more about Kpi worksheets. We're gonna start a simpler one. If you're doing more intensive or want to do more intensive stuff. We have one. But we're gonna start on that next month, and then that success shifter is your personal accountability to make sure that you're actually showing up and doing the things they're gonna really compound into that next level of success. So we're gonna dive a little bit deeper into these in each of our calls.

428

01:38:10.160 --> 01:38:23.749

Stephanie Bogan: This month, we're focused on the one page plan. I know a number of you have worked on it. A number of you are still working on it from our calls last week I'll be sending the follow up resources today or tomorrow after this call, because I want to get everyone on the same page.

429

01:38:23.790 --> 01:38:31.100

Stephanie Bogan: The thing that's really important about this piece is the my model practice, and the 3 year I think it's called mapping your business worksheet.

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01:38:31.250 --> 01:38:44.830

Stephanie Bogan: You can you get to the same place. Those are just the high level version. This is this year's plan, right? So those are ways. Those are great steps in the process of getting here. The number one most important part is you start, is this top section.

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01:38:45.120 --> 01:39:07.409

Stephanie Bogan: Those are the key big objectives. Right? I want to take 60 days off. I wanna, you know, optimize my efficiency and automate workflows. And I want to grow revenue 20 in this example. Right? What are those objectives? The goals that you have underneath that that you need to create, and then each quarter will you? Right? You'll go through and identify the priorities very similar to the way that Tiffany mentioned. You might have fewer meetings.

432

01:39:07.440 --> 01:39:20.929

Stephanie Bogan: but the goal is to be intentional about where you're applying your change energy. It's an asset like running the shop energy and marketing energy. We just don't really look at it through that lens. So if we have a system, we get a lot more leverage.

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01:39:20.970 --> 01:39:37.759

Stephanie Bogan: As you heard me say a few times already, when the vision is clear, the decisions are easy, or at least a lot easier in terms of how we create alignment. The second thing is, we're gonna work on our email. Some of you have already pulled yourself out of email or shut down the number of times, which is fantastic.

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01:39:37.810 --> 01:40:00.949

Stephanie Bogan: Your goal this month is to implement some strategy from the options of elevating your email. You're gonna start using same box. You're gonna delegate it to your assistant. What is the strategy that you're gonna use to make sure you're moving the needle email is your number one dilution source. You check it 17 times a day, on average 3.7 h most going to our earlier conversation.

435

01:40:00.990 --> 01:40:13.490

Stephanie Bogan: It doesn't optimize your how I use your time. And it does not optimize your role time,



right? The impact and contribution you have to the business is largely not affected by email. 90% of what's in there does not move the needle.

436

01:40:13.730 --> 01:40:17.590

Stephanie Bogan: And third, we're gonna start Friday cohort check ins.

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01:40:18.040 --> 01:40:46.730

Stephanie Bogan: And so what I'm gonna do on Friday is I'm gonna send out an email to the group. If you have any issues sharing your email, please let me know. Assume everyone's cool with it because you're all in this together. And it's gonna ask you a series of questions. Ask better questions, get better answers. Right? What did you work on? What was the impact. What do you need to be held accountable to? Or where do you need support? And your job by the end of Friday is to reflect on that and check in, and then reply all to the group.

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01:40:46.880 --> 01:40:59.800

Stephanie Bogan: Right, Chris will be like, I worked on this. It was important, because this is where I'm challenged. This is where I need support and she's gonna send that you do not have to reply all to everyone. The goal is accountability.

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01:41:00.120 --> 01:41:18.780

Stephanie Bogan: habit, building, clarity and focus. Where am I this week? What do I need to be doing? Am I aligned? This is personal productivity. right to Tiffany's point. Those monthly meetings are your leadership focus? Am I working on the right things? Are we adding value to the business or the initiatives having the results they want?

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01:41:19.030 --> 01:41:22.389

Stephanie Bogan: So we're gonna this month. Focus on the one page plan.

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01:41:22.870 --> 01:41:40.330

Stephanie Bogan: elevating your email and your inbox and then creating greater awareness and accountability that in turn ties to actions that move you forward through those Friday check in. So this Friday, you will get the email from me sometime during the day you'll typically get it in the morning we'll find a set time

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01:41:40.410 --> 01:41:58.320

Stephanie Bogan: your job is not to respond to it right away whenever your day ends on Friday. This is a new habit. So the likelihood is you're gonna have to work at it until like a couple weeks go by and just put a post in on your desk, put a thing on your calendar, write weekly check in with leaders before I go home.

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01:41:59.090 --> 01:42:05.410

Stephanie Bogan: The goal is to pause and reflect on how you spent your time this week

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01:42:06.450 --> 01:42:19.160

Stephanie Bogan: so that you can get right clear and aligned on how you want to spend your time going forward. So those are the 3 things we're gonna focus on this month. If you have any issues or questions,



do not hesitate to reach out to me. That's what we're here for.

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01:42:19.530 --> 01:42:33.480

Stephanie Bogan: Alright! I wanna go around really quickly. I think we're just coming up on time. I can't see my clock right now, are we? Add or over Allison words right? Hyper focused

446

01:42:33.490 --> 01:42:47.170

Stephanie Bogan: as you think about moving for today's call. What is your key takeaway? And any action item, if you have one associated with it. So take like 30 s to think about that key takeaway from today's call

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01:42:49.300 --> 01:42:55.729

Stephanie Bogan: Action item associated with it. Gonna start on the other end this time. Sarah, are you there?

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01:42:56.710 --> 01:43:01.540

Sara Stanich: I'm here. Okay.

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01:43:01.890 --> 01:43:03.180

Sara Stanich: And

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01:43:03.470 --> 01:43:06.149

Sara Stanich: I like the Chief birth office title

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01:43:06.530 --> 01:43:08.799

Stephanie Bogan: like, I want that job.

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01:43:08.820 --> 01:43:20.039

Sara Stanich: and it's kind of aligned with, you know. Ha! I don't know. So I need to think about our rules a little bit. How about you?

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01:43:20.810 --> 01:43:21.560

robertwyrick: Me?

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01:43:21.810 --> 01:43:22.670

Stephanie Bogan: Yes.

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01:43:24.080 --> 01:43:25.090

robertwyrick: thank you.

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01:43:26.920 --> 01:43:37.020

robertwyrick: I don't remember the exact terminology use, but but accountability. I guess we have some talented people, but I find that things end up flowing back through me



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01:43:37.050 --> 01:43:59.260

robertwyrick: right? We did this incredible Roth analysis, Rob, what do you think? Right? It comes back to me. Operations, you guys, you know, we give them responsibility and somehow comes back to me, and as though I'm sort of having to approve things along the way, or feel like like everybody else feels like I need to have my eyes on it, and so sort of stopping that process. So it doesn't have to flow back through me

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01:43:59.450 --> 01:44:03.310

robertwyrick: at the end of the the project. If that makes sense.

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01:44:03.440 --> 01:44:04.810

Stephanie Bogan: Ryan, how about you?

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01:44:05.970 --> 01:44:21.390

Ryan Wyatt: My key takeaway would be. that I want to do exactly what Tiffany opened up with like long term that chief growth officer role, and if she can do it and experience success with it, then

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01:44:21.580 --> 01:44:27.539

Ryan Wyatt: I can, too. And it's just a matter of finding the people that you know want to focus more with the clients and the planning and all that kind of stuff.

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01:44:27.630 --> 01:44:36.559

Stephanie Bogan: You guys are in a similar but different situation than Tiff and, Jared, when they start, which is, you're just. You're you've got to create the the scaffolding and the right the foundation

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01:44:36.580 --> 01:44:50.669

Stephanie Bogan: to put you in that position, and so Tiff just thought she was starting there and had to back up a little bit. You're not yet in the position, and you're building into it. So you hear me talk a lot about that 3 year runway, when we really get intentional about something

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01:44:50.770 --> 01:45:10.670

Stephanie Bogan: right where where it's just group like the wheels, just grease. And it's just groovin. On average, it's right. 2 or 3 years of applied effort, whether it's your growth machine re-engineering the firm. And so for you like, think of that as part of that 3 year vision that you and Ron are working on is right. I am a full fledged cgo position in 3 years

465

01:45:11.010 --> 01:45:30.229

Stephanie Bogan: or or 50% time. Right? I like, I'm not gonna say it has to be 100. I just know that's a fun goal, because that vision then says, What do we have to backfill to get there? Oh, my gosh, we just laid out a roadmap for change right? We gotta get the people to to right. That's, I think, to Kevin's question, to Tiffany we had to get the team really aligned first.

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01:45:30.230 --> 01:45:45.659

Stephanie Bogan: cause they? You gotta run the shop without interruption, or you have no ability to



focus on improvement. And you all know exactly what I'm talking about there. So, Kevin. Right? It was. Get the team. Get the client right income piece right right? Working with the right clients for the right fees. Get the team piece right?

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01:45:46.030 --> 01:45:50.909

Stephanie Bogan: Then we have a little bit more leverage right to focus on improvements and growth.

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01:45:51.530 --> 01:46:02.209

Stephanie Bogan: So, Ryan, good, yeah, just think about what percentage your time. If it's a hundred percent great. But 3 years is enough time to do it. Your gentle coach nudge like it shouldn't really be 3 years.

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01:46:02.240 --> 01:46:12.830

Stephanie Bogan: and it's challenging. Like to put yourself in that spot in 3 years, like you guys are gonna hustle and work. But it's totally doable challenging. Danny and Chase, how about you guys?

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01:46:13.500 --> 01:46:24.219

WFA: Hey? I my take away is I need to slow down with ideas. And then, when I do have one to communicate it more effectively like with collaboration in mind, and not not that I'm a

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01:46:24.610 --> 01:46:29.790

WFA: I'm passing on just my business, and we gotta do it. But just being very conscious of the way that it's worded.

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01:46:30.460 --> 01:46:31.979

I like Bofo

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01:46:32.380 --> 01:46:49.859

WFA: also using that. And then, like, Bring in like me and Danny feel like we just sit bounce around ideas all day, and not that we think we're gonna like implement, all of them. But we do. We do not have a process like Tiffany talked about to bring it to like, bring it correctly to

474

01:46:49.910 --> 01:46:59.969

WFA: take the team in some way. We're usually the kind of we just okay. Well, this is a good idea we learned about. And we wanna do it. Okay, now do it. And it doesn't. Actually.

475

01:47:00.160 --> 01:47:04.809

we did a better process on that. So that's I'm thinking about that today.

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01:47:05.380 --> 01:47:12.710

Stephanie Bogan: So that's your launch process. Right? Go watch that vision and action accountability lesson. They both talk about it. It's got the rocket ship.

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01:47:12.770 --> 01:47:34.730



Stephanie Bogan: That's essentially right, our version because it's just simplified for firms that don't need L 10 meetings. And all of that right? We've been using it for years. It's basically your process, and then you can modify it. Tiffany samples are all in there. Agenda scripts, checklists, etc. So don't hesitate to use those. They're all also in the strategic planning lesson. I think she and Jared did that one

478

01:47:35.080 --> 01:47:37.150

Stephanie Bogan: 2 years, was it 2 years ago? Tef?

479

01:47:38.860 --> 01:47:47.439

Stephanie Bogan: Yep. alright. So these are assignments. Let's see as we get Danny and Chase Kevin, how about you? Key takeaways and action items next steps

480

01:47:49.450 --> 01:47:50.260

kevin: one

481

01:47:52.710 --> 01:47:54.469

Stephanie Bogan: Kevin with the black table. Sorry

482

01:47:54.490 --> 01:47:59.670

kevin: I'm gonna get. I will get better at this.

483

01:47:59.810 --> 01:48:07.049

kevin: Mine would be team and we have systems and processes. But really getting their feedbacks in it.

484

01:48:07.080 --> 01:48:13.859

Stephanie Bogan: and and have more ownership in it for for them.

485

01:48:18.210 --> 01:48:29.140

Liana Poodiack: For me, it's taking control of my time again. So redoing, scheduling, making sure I'm being more mindful of not checking emails throughout the day.

486

01:48:29.220 --> 01:48:33.590

Stephanie Bogan: excellent love it.

487

01:48:33.680 --> 01:48:35.189

Stephanie Bogan: Chris, how about you?

488

01:48:35.920 --> 01:48:44.069

Chris Wedell: Yeah, I'm along the same subject of time. I wanna just shift my mindset around time from

489

01:48:44.150 --> 01:48:50.750

Chris Wedell: you know my schedules crazy to my schedule, is intentional and manageable.



490

01:48:51.260 --> 01:49:09.569

Chris Wedell: and put some of the action items in place, like limiting time on social media and checking email and delegating calls back to clients and emails, to clients like just all the things that I do, because it's faster in my head delegating. I just have to stop doing that.

491

01:49:10.620 --> 01:49:17.819

Stephanie Bogan: It's that shift and just taking that next step. So you just increase the momentum in the direction that you want. So it's great. Ed.

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01:49:17.830 --> 01:49:25.560

Ed Woehlcke: we're gonna end on a high note. Good sir, what are your key takeaways of Action Islands. I think, really just trying to determine.

493

01:49:26.100 --> 01:49:31.030

Ed Woehlcke: like, more or less, the board chart or the

494

01:49:31.280 --> 01:49:37.019

Ed Woehlcke: the structure, the scaffolding, as you just mentioned. And then how much capacity

495

01:49:37.120 --> 01:49:38.609

Ed Woehlcke: we have to fill that

496

01:49:39.150 --> 01:49:53.250

Stephanie Bogan: excellent yeah, we're going to talk a lot about business model and the org chart, and how it's going to grow as you hit those goals at Summit, so get yourself set up for success, and then add, that'll be a great topic for some er leaders. Retreat.

497

01:49:53.640 --> 01:49:56.889

Stephanie Bogan: Travis, are you still there? I see your name at least.

498

01:49:58.360 --> 01:50:09.549

travis: Yeah, I don't have my webcam with me. No worries Key takeaways I would say the biggest thing that I underwind was kind of slow down.

499

01:50:09.640 --> 01:50:25.209

travis: and then, you know, ask better questions to get better answers, I think very simple wisdom, but very impactful. Yeah, I think 3 takeaways that I would leave you guys right if your posted version of things to remember. Ask better questions, get better answers.

500

01:50:25.690 --> 01:50:46.739

Stephanie Bogan: Don't ask your team. Why did this happen? Why did it go wrong? Just say, can you write? Give me a review of what went down and what you think we need to do to fix it is a much more positive involvement. Oriented spend, for example, so just really get clear on the questions you're asking tiff. And Jared have moved from not asking reactive questions. Why did you do that? How did that



happen.

501

01:50:46.910 --> 01:50:55.360

Stephanie Bogan: We everyone knows that's not gonna be a great conversation ever now they're all the way on the other side of hey? What do you think it would take if

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01:50:55.770 --> 01:51:05.149

Stephanie Bogan: like, and their teams like. Oh, what a great question! Let's go figure it out right. That is the the transformation you're trying to make to involvement equals investment

503

01:51:05.620 --> 01:51:22.009

Stephanie Bogan: involvement is, get clear, lead your team. Let them know what they need to do, or the next steps right? Let them share responsibility for creating outcomes, and 3 is, I learned this at Genworth when I got acquired by a fortune, 200 company, and you joined the executive team.

504

01:51:22.400 --> 01:51:32.840

Stephanie Bogan: and you're so used to just going off and being a rock star and doing things, and all of a sudden is like your arms are tied to your body, and you can't get anything done. And the CEO taught me a lot of things, mostly not what I expected.

505

01:51:33.140 --> 01:51:38.699

Stephanie Bogan: But there was one really incredible takeaway that I got from him, which was, he sat me down one day, and he said, Stephanie.

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01:51:39.180 --> 01:52:01.280

Stephanie Bogan: it's really great that you're so good at what you do, Ryan, Sarah Chris, Leanna Kevin, Danny, right, all of you guys. Great that you're so good at what you do, he said. Success at this point has been about being really good at what you do, he said. All of your success going forward is, gonna be about what you can do with and through other people to create.

507

01:52:01.820 --> 01:52:13.800

Stephanie Bogan: And I remember being like, you know, it was like 3 4 at the time. I just looked my company right. I thought I knew all this stuff, and I was like, I'm the management consultant, you know, and it took me about 6 months, and I was like holy hell.

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01:52:13.870 --> 01:52:32.159

Stephanie Bogan: He nailed that one like to this day I still share it. He gets total credit for it. I don't know what what I don't want in leadership, but that was one thing that he really nailed was everything that you guys want from this point forward is not about what you can do. It is about what you can do with and through

509

01:52:32.170 --> 01:52:38.190

Stephanie Bogan: the people that you surround yourself with your clients. And ultimately I for today's conversation, really your team.

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01:52:38.770 --> 01:53:06.300

Stephanie Bogan: So hopefully, those were good key takeaways, you've got kind of your structured action items for this quarter. Hopefully, you got some things from this call that will help you. I will be following up with each of you this week around the vision work the follow ups from our calls and just checking in to see if you've got any questions to move forward with clarity and confidence. But other than that, it's been great to see you guys today. Good to see the momentum and the mindset and the methods starting to shift and reach out as we can help. You guys have a fantastic week.

511

01:53:06.300 --> 01:53:20.299

Stephanie Bogan: Make it a really great week, and do not forget every single day. It's my new mantra. I got a little sign. I gotta get it shipped from Costa Rica, cause I left it there. It's a little like big sign, like there's metal signs almost like a giant license plate. And it says.

512

01:53:20.610 --> 01:53:22.369

Stephanie Bogan: life is now in session.

513

01:53:24.250 --> 01:53:35.779

Stephanie Bogan: And I just read that. And I thought, Wow, yeah, I'm not getting like 7 replays on this baby. Life is now in session. There's no retake. There's no do over. So as you think about this quarter, clarifying your vision.

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01:53:35.810 --> 01:53:54.030

Stephanie Bogan: putting the foundation for happy, high performing habits in place and creating systems that hold you accountable to create and enjoy those levels of success. That's some of the most important work that we're gonna do here, probably the most important that we'll do together and everything else. From this point, ladies and gentlemen, is just mechanics, so

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01:53:54.050 --> 01:53:57.369

Stephanie Bogan: let us know how we can help with that. You guys make it a great week. Take care.

