



LEADERS

# PEAK PRACTICE

COACHING CALL

FEBRUARY 2024





CLARIFYING  
YOUR VISION



CREATING POSITIVE  
MINDSET AND HIGH-  
PERFORMANCE HABITS



PRODUCTIVITY &  
ACCOUNTABILITY  
SYSTEMS

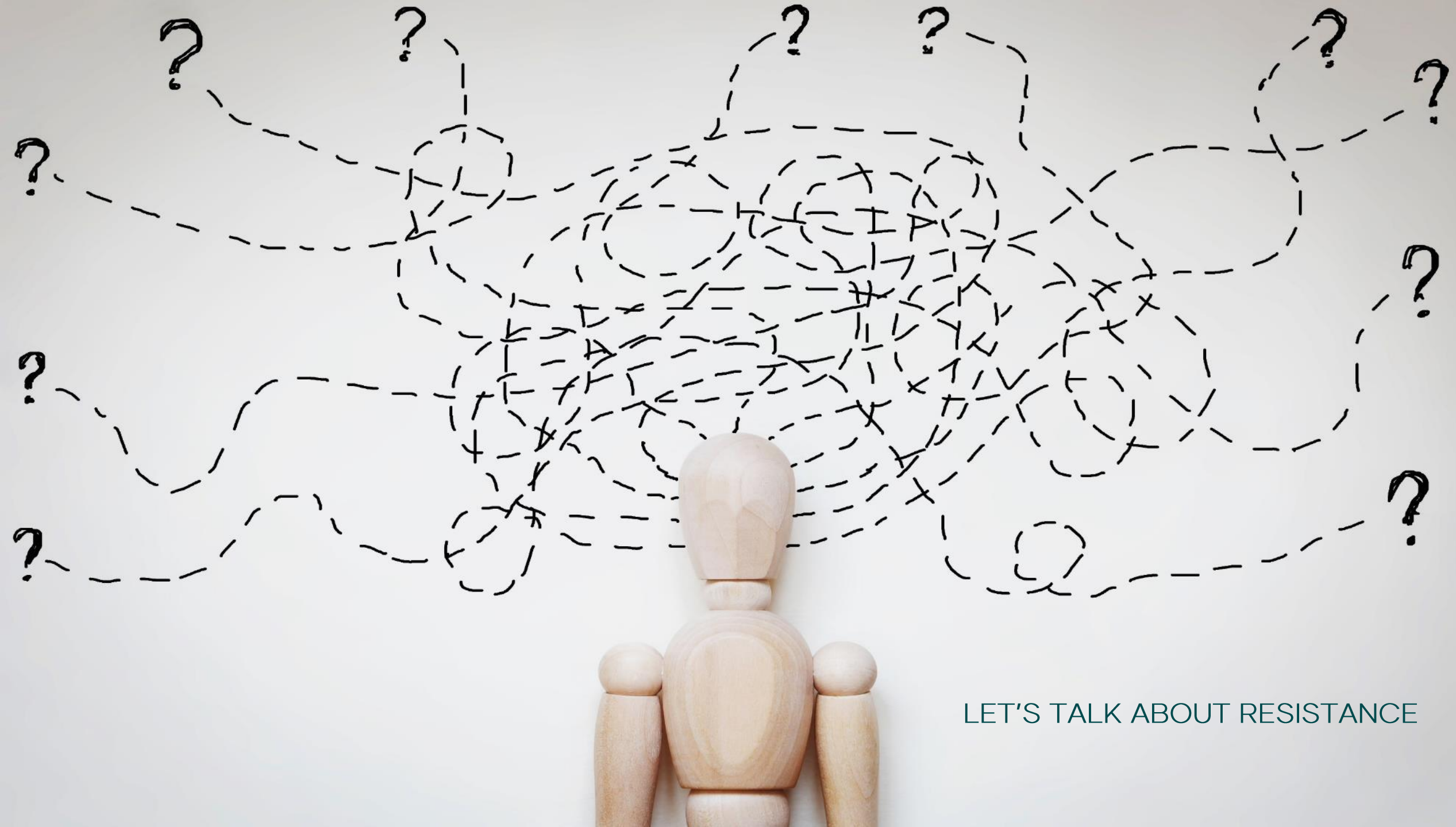
OUR FOCUS  
THIS QUARTER



This Month's Topic

# IMPLEMENTING CHANGE

(with teams)



LET'S TALK ABOUT RESISTANCE



CLARIFYING  
YOUR VISION



CREATING POSITIVE  
PERSONAL HABITS



BUILDING  
ACCOUNTABILITY  
SYSTEMS

OUR FOCUS  
THIS QUARTER

- My Model Practice  
\*Base Camp Learning Path
- Your Vision For Success  
\*Base Camp Learning Path
- Science of Success
- Taking Control of Your Time
- High-Performance Happiness
- Strategic Planning
- Managing Firm Performance
- Managing Plans, Project & Priorities
- Action & Accountability



## Limitless Advisor SUMMIT ACTION PLAN

Use this form to set your priorities and actions for the quarter

NAME: Ima Awesome  
 YEAR: 2024  
 QUARTER: Q1 (Performance Summit)

### This Quarter's Priorities

**BIG Priority:** 3-Yr Vision

### Big Why & Desired Outcomes

Clarify the outcome you want to create, the benefits of achieving it and why it's important to you.  
 \$1M/100 days, 30-hr weeks, travel lifestyle

	DUE DATE	OWNER	NOTES
ACTION 1:	Complete 3-year Vision and My Model Practice practice worksheets		
ACTION 2:	Draft 1-pg Business Plan (pick top 3-4 objectives for the year)		
ACTION 3:	Share vision/goals with team		
ACTION 4:	Schedule time to work on Q1 priorities		
ACTION 5:	Review Vision/progress in Friday Check-In & monthly team meeting		

**Progress Priority:** Time Systems

	DUE DATE	OWNER	NOTES
ACTION 1:	Set up 2024 Annual Calendar		
ACTION 2:	Implement Model Weekly Schedule (surge and non-surge)		
ACTION 3:	Delegate Email to Asst (get Asst to delegate to)		
ACTION 4:	Implement Email 2x Day ONLY policy!		
ACTION 5:	Start prep for Client Meeting Surges (Fall or Spring 2025)		

**Progress Priority:** Accountability Model (Launch Process)

	DUE DATE	OWNER	NOTES
ACTION 1:	Watch Action & Accountability lesson; Managing Performance (advanced)		
ACTION 2:	Fill out Key Performance Indicator worksheet; start tracking quarterly		
ACTION 3:	Schedule Quarterly LAUNCH meetings; prep Agenda		
ACTION 4:	Hold Q2, Q3 LAUNCH meeting; update Q3 priorities/scheduling		
ACTION 5:	Set and hold Q4 LAUNCH or Strategic Planning Meeting		

Reference and use the On-Purpose Project Planner to help you effectively scope, implement and manage each priority for optimal results.

# Limitless To-Do Plans



# IMPLEMENTING CHANGE WITH TEAMS

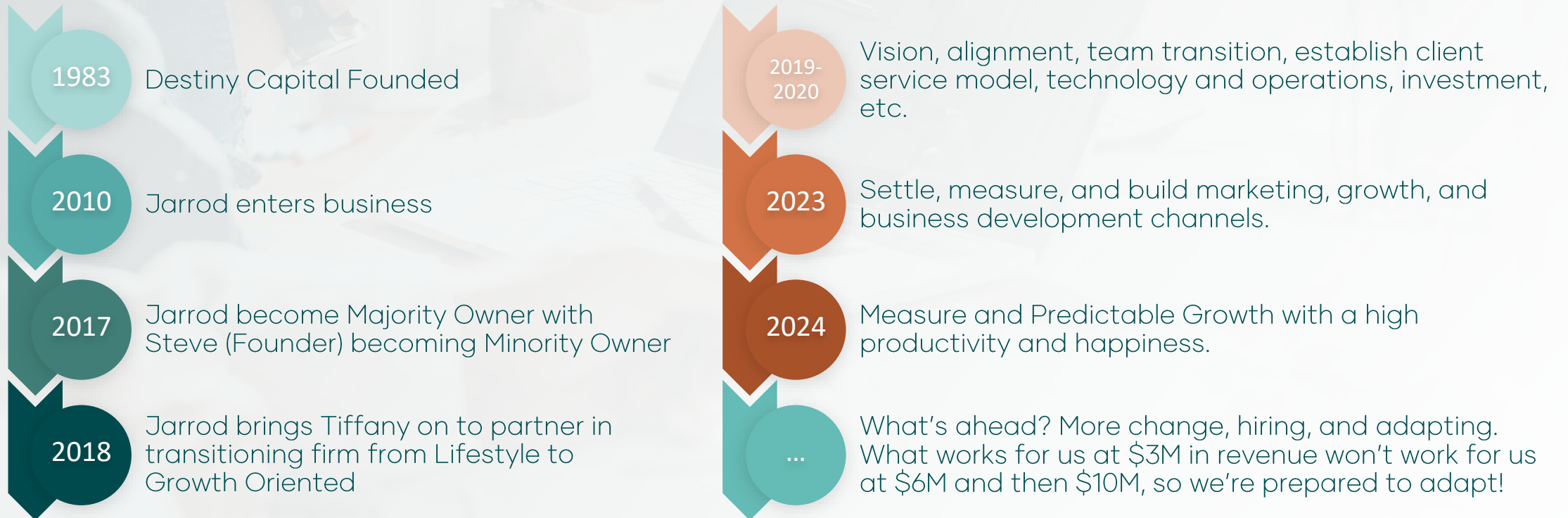


TIFFANY  
CHARLES

Establishing Sustainable  
Practices and a Culture for  
Operational Excellence

# THE JOURNEY OF CHANGE

## TIMELINE



So, how do you do all of this successfully???

# PARTNER ALIGNMENT

Leading Change Effectively



Effective Leadership  
Drives Cultural &  
Operational Shifts



Slow  
Down



Be Involved &  
Implement Change

# CREATING ALIGNMENT & INVESTMENT



# STRATEGIC OVERSIGHT AND PROACTIVE MANAGEMENT FOR TEAM SUCCESS

## Methods to Manage Teams & Ensure Accountability



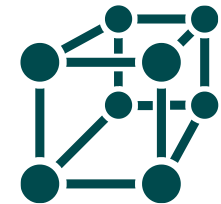
All Company  
Weekly Meetings



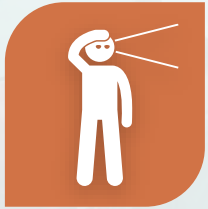
Team Meetings &  
1:1's



KPI'S



Lattice



**DO YOU HAVE A CLEAR & COMPELLING VISION?**  
 YOU NEED A WHY BIGGER THAN YOUR WHAT IF'S



**DO YOU HAVE HAPPY, HIGH-PERFORMANCE HABITS?**  
 YOUR THINKING & YOUR HABITS DEFINE WORK, WEALTH & WELL-BEING



**WHAT ARE YOUR PERSONAL and PRACTICE ACCOUNTABILITY SYSTEMS?**  
 THE SYSTEMS MUST BE STRONGER THAN THE RESISTANCE THEY WILL FACE

Limitless Advisor  
**SUMMIT ACTION PLAN**

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This Quarter's Priorities

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ACTION 5: Review Vision/progress in Friday Check-In & monthly team meeting			

**Progress Priority: Time Systems**

ACTION	DUE DATE	OWNER	NOTES
ACTION 1: Set up 2024 Annual Calendar			
ACTION 2: Implement Model Weekly Schedule (surge and non-surge)			
ACTION 3: Delegate Email to Asst.; Email 2x day ONLY; Social Media timer @ 30min max			
ACTION 4: Start Daily Practice and Friday Check Ins			
ACTION 5: Start prep for Client Meeting Surges (Fall or Spring 2025)			

**Progress Priority: Accountability Model (Launch Process)**

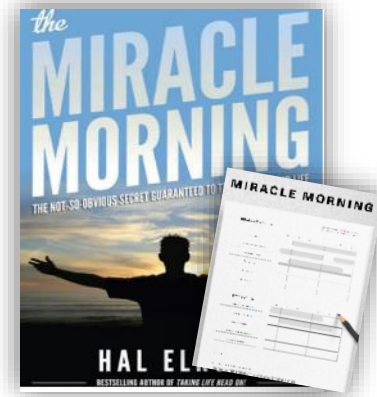
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ACTION 3: Schedule Quarterly LAUNCH meetings; prep Agenda			
ACTION 4: Set up and start using Success Shifter to develop happy, high-performance habits			
ACTION 5: Start a Daily Practice to improve performance and well-being			

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## CLARIFY YOUR VISION

- Big Why
- Business Vision / Model Practice
- 1-page Business Plan
- Limitless Life Book




## CREATING POSITIVE PERSONAL HABITS

- Daily Practice
- Email 2x day Only
- Delegate your Email
- Weekly Check-In



## BUILDING ACCOUNTABILITY SYSTEMS

- Success Shifter
- KPI Worksheet

# RADICAL ACCOUNTABILITY

1  
DRAFT  
1-PG  
PLAN

2  
ELEVATE  
YOUR  
EMAIL

**MANAGING STEPHANIE'S EMAIL INBOX**

**PROCESS**

Process Owner: Executive Assistant  
Frequency: Daily

**WHAT IS THE INBOX PROCESS?**  
The process by which you review Stephanie's inboxes (Email, LACP, LinkedIn) and process all incoming messages.

**ROLE**  
The Executive Assistant's role is to manage Stephanie's email so that it is processed and/or presented to Stephanie so that she can respond and direct work *efficiently*. Your job is to make sure she delivers on time, as promised, every time, and email is critical to meeting this standard.

3  
FRIDAY  
COHORT  
CHECK-INS

**Process**

Review on per program.

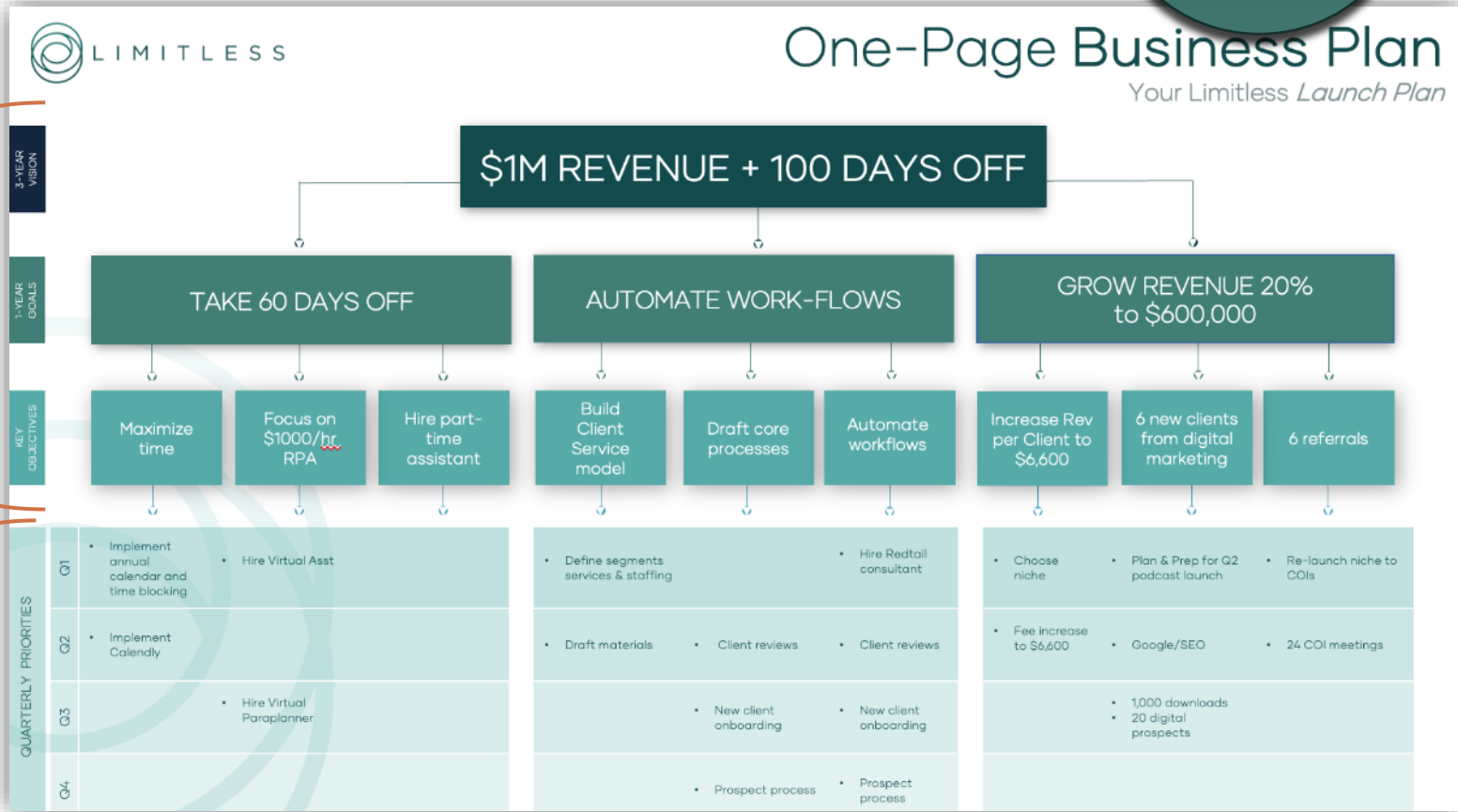
**Accountability**

- Successful podcasts are reviewed for content and have significant revenue opportunities.
- Develop a marketing program change.
- Follow up with a number of outstanding clients that were not reached.

**Why create?**

- Grow and fill the right kinds of clients. Make the most of the current situation and come out on top of the market.
- Develop. Contributing to some of the risks of the product, and to our own success, we hope to bring long-term relationships and solid introductions.
- There are a few dead leads that I feel as though they are not ready to talk and are only a few minutes away. This is the time to make sure they are not lost and to get them to the point where they can be contacted.

Example: This is my Website



THIS IS YOUR Q1 FOCUS

THIS YOU DECIDE EACH SUMMIT (QUARTER)

FINISH & BRING YOUR 1-PG BUSINESS PLAN TO FEB. 26 LEADERS COHORT CALL

# 10 STEPS TO CREATE NEW LEVELS OF SUCCESS

To break old habits and build a better future, follow these top 10 steps



SELF  
REFLECTION



CLEAR  
GOALS



CREATE A  
PLAN



REPLACE  
BAD HABITS



STAY  
ACCOUNTABLE



PRACTICE  
PATIENCE



SEEK  
SUPPORT



POSITIVE  
VISUALIZATION



CELEBRATE  
SMALL WINS



CONSISTENCY  
COMPOUNDS

THE SYSTEM MUST BE STRONGER THAN THE RESISTANCE IT WILL FACE

# Q&A

