

LIMITLESS Coaching Call Transcript

March 4th, 2024
Leaders Coaching Call
Peak Practice

WEBVTT

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00:12:44.470 --> 00:12:51.179

Natalie Bergsma: So I wanna start off today's call just checking in and see who has

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00:12:51.210 --> 00:13:05.580

Natalie Bergsma: a win to to share with the group or something that they wanna bring in terms of successes, because that's so important as we start to talk about accountability is celebrating our wins and successes.

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00:13:11.230 --> 00:13:20.520

kevin: Okay, I'll jump in. I can't sit in silence that long.

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00:13:20.770 --> 00:13:30.680

kevin: no small small things here, but I think, that's kind of what's all about. So we've had our first. We're 5 person team, and we started our first

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00:13:30.810 --> 00:13:44.770

kevin: weekly kind of all team meeting. We just really kind of been scattered with that in the past. Haven't really had a cohesive team meeting, and this is our second one this morning and it's just been really productive. I think we're kinda

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00:13:45.050 --> 00:14:04.569

kevin: so sick of meetings when we left a more corporate environment like 6 years ago that we just stopped having meetings altogether and starting to realize it just needs to be better, more efficient meetings, and that they could be very valuable. So having those 2 meetings getting everybody because we're virtual, too. So none of us are in the same building. So

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00:14:04.620 --> 00:14:08.540

kevin: you know, getting that on the books and and just having that kind of

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00:14:08.680 --> 00:14:16.220

kevin: culture building, but also more intentionality around. What we're going to be doing that week and keeping track of things has been has been great.



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00:14:17.440 --> 00:14:18.300

Stephanie Bogan: awesome.

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00:14:18.600 --> 00:14:22.379

Natalie Bergsma: That's fantastic, Kevin. Thank you. And it's it's

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00:14:22.420 --> 00:14:44.400

Natalie Bergsma: serendipitous that you're talking about the success that you've had with your team in creating a structure that in my experience creates additional accountability right? When we all get together and we show up and we hold each other accountable as long as you're doing it in a healthy and productive way. Then that's really what we're looking on. So

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00:14:44.480 --> 00:15:10.069

Natalie Bergsma: wanna take a minute to kind of step back and look at what we've been focusing on this quarter and sort of where that's going to take us next. We spent a lot of time clarifying our vision, right? Getting really clear on our purpose, and why we're here. And what's gonna keep us motivated when we meet resistance? Right? What are those intrinsic motivators that are gonna keep us going.

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00:15:10.370 --> 00:15:16.519

Natalie Bergsma: creating positive habits and mindsets. This is 90%

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00:15:16.520 --> 00:15:37.380

Natalie Bergsma: of the the work right? The way that we show up and who we show up as has a huge impact on our successes and what we're working on on a day to day basis. And today we're gonna dig in a little bit deeper into building accountability systems. Right? So if we know where we're going, and if we have

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00:15:37.380 --> 00:15:49.120

Natalie Bergsma: the awareness to manage how our thoughts impacts our feelings which impact our actions. Then what are the systems and structures and processes and people we wanna put in place

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00:15:49.120 --> 00:15:55.590

Natalie Bergsma: that are going to hold us accountable to making progress in those areas.

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00:15:55.890 --> 00:15:57.829

Natalie Bergsma: We found that

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00:15:57.860 --> 00:16:26.370

Natalie Bergsma: research shows that willpower isn't enough right because it's actually an exhaustible resource. I don't have the same amount of willpower when I wake up in the morning, as I do at the end of every day. Right? So I need to have some structure in place to help me achieve and move forward on my goals. And so that's really what we're gonna dive into around the conversation today, which is accountability, not just



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00:16:26.370 --> 00:16:43.150

Natalie Bergsma: what I would call extrinsic accountability. We're all pretty good at that, right? You show up for client meetings when they get scheduled right. Someone asked you to do something. We have a tendency to meet those things. Part of what we're talking about is creating a system of personal accountability.

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00:16:43.230 --> 00:16:57.499

Natalie Bergsma: How do we actually hold our own selves accountable to the vision and goals that we have. How do we do that from someplace within us, as opposed to waiting on the world to hold us accountable.

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00:16:57.990 --> 00:16:59.600

Natalie Bergsma: And there she is.

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00:16:59.740 --> 00:17:02.080

Stephanie Bogan: lovely as ever. Yeah.

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00:17:02.570 --> 00:17:16.370

Stephanie Bogan: yeah, I was gonna say, will power is a problem only because it's never there when we need it. I was just literally in a room with 500 people ran up to the hook right down there, ran up here. I'm gonna go back into a panel on growth 3, 30.

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00:17:16.680 --> 00:17:18.589

Stephanie Bogan: everything that we want.

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00:17:19.480 --> 00:17:21.810

Stephanie Bogan: everything that we want

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00:17:22.510 --> 00:17:45.369

Stephanie Bogan: work, wealth. Well, being business, body bank accounts, relationships really all boils down to what's our vision for what we want? Are we clear and aligning our time, energy, and capital to those things, too? Do we have the mindset and the habits to really put ourselves in a position to create that reality for ourselves. Because if we don't, we're just fibbing.

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00:17:45.560 --> 00:17:49.580

Stephanie Bogan: and 3, which is what we're really talking about today.

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00:17:49.910 --> 00:18:03.330

Stephanie Bogan: And, ladies and gentlemen, this is the hard part ability system. Mark in your firm who's beating down the door and saying, Mark, did you do that today? Nobody.

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00:18:04.040 --> 00:18:14.520

Stephanie Bogan: Because you're in charge of your firm, Rob, how many people are banging on your door going? Why didn't you, you know, if you had a PE firm and they'd invested 2 million dollars, they'd



be like, Hey, Rob.

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00:18:14.560 --> 00:18:21.109

Stephanie Bogan: where's the revenue? Right being where we are is so incredibly powerful and

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00:18:21.580 --> 00:18:32.470

Stephanie Bogan: concentrated. That's what I'm like. We have the ability to really affect so much change, Kevin. And and do we?

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00:18:33.180 --> 00:18:47.010

Stephanie Bogan: Do we? This whole quarter is about setting yourself up for success, whether you want to grow through growth or teams or Ops, or like. You all have very similar goals which are about scaling growth.

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00:18:47.410 --> 00:18:56.859

Stephanie Bogan: The real work, the real work this year isn't about the systems or the people, or the process or the platforms, because that work is doable.

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00:18:57.680 --> 00:19:06.709

Stephanie Bogan: The real work this year is about your ability to sit in that next level of leadership. Rob, Mark Kevin.

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00:19:07.750 --> 00:19:08.650

Stephanie Bogan: Sarah.

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00:19:08.820 --> 00:19:25.050

Stephanie Bogan: can you sit in that next level of leadership. Can you bring those skills? Can you bring that attitude? Can you bring that mindset and that accountability to yourself and the team so that the business can truly skyrocket in terms of what is next. That's

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00:19:25.140 --> 00:19:35.510

Stephanie Bogan: really our goal for the quarter. When we think about the focus points of vision, mindset and habits and accountability. It's not like vision mindset. And again, they're like, this is stuff. Who cares?

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00:19:36.630 --> 00:19:39.570

Stephanie Bogan: The power of those things

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00:19:39.600 --> 00:19:46.500

Stephanie Bogan: is that when we integrate them into our lives. They have the ability to radically accelerate our success.

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00:19:46.790 --> 00:19:49.210

Stephanie Bogan: And that's what we're working toward this year.



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00:19:52.570 --> 00:19:55.180

Stephanie Bogan: If I had the power to click the slide forward. I would do that right now.

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00:19:58.820 --> 00:20:21.899

Natalie Bergsma: I love that we tried about a bit so I won't go into detail. But right making sure that you have clarity and completed the things that are gonna help you get where you want to go. Right? Do you have your big y, your business model your one page plan. Do you have daily practices in place? Have you worked on things like checking your email twice a day, delegating, having a weekly check in right

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00:20:21.900 --> 00:20:51.679

Natalie Bergsma: having positive habits that are gonna create momentum for you and then digging in today we're gonna dig a little bit deeper into the success shifter, and how that really simple, simple tool can create a positive change. For where you want to go. Hence the name success shifter, and digging a little bit deeper into kpis. Right? How do we use metrics to look under the hood to give us the data and information we need to make informed decisions in alignment with where we want to go.

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00:20:52.150 --> 00:21:04.640

Stephanie Bogan: Yeah, I was just. I was. I've been working with this group downstairs for like a year, and they've had people like 2 x 3 x, literally in the span of a year, and the only difference that they've made they're learning all the things you're learning, by the way.

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00:21:04.900 --> 00:21:08.389

Stephanie Bogan: is, it's that clarity and intention. Who is the client?

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00:21:08.440 --> 00:21:16.419

Stephanie Bogan: How do I approach them like? What? What are the systems that I know will work in spite of my discomfort. So to Natalie's point.

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00:21:16.780 --> 00:21:22.309

Stephanie Bogan: as you think about coach, if you're familiar, like coach takes an entire year on time.

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00:21:24.210 --> 00:21:26.500

Stephanie Bogan: we're giving you the truncated version

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00:21:26.590 --> 00:21:39.700

Stephanie Bogan: and understanding. Every year over a couple of years you're gonna get better and better. But step one is, you got to clarify your vision, so you can align your time with the things that are going to support that vision period period.

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00:21:40.450 --> 00:21:53.399

Stephanie Bogan: We spend half our time doing things, chase that are not aligned with the vision, or we're stuck in the weeds, and we gotta figure out how to get ourselves out of them, so the business can grow without being dependent on us.

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00:21:53.950 --> 00:22:06.530

Stephanie Bogan: That means that we have to craft that positive mindset and those habits. How do we get in the space? I was just in a group. One guy went from 2 people to 11 people in a year. I'm not saying, by the way, you all have to run out and hire 9 people.

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00:22:07.260 --> 00:22:30.370

Stephanie Bogan: That was his model to really elevate himself to the Tippity Tip, Chase. What are your energy creating revenue producing activities, Ryan? We know yours right? Like, you're a rainmate, like, if there are 2 or 3 things that you do that add deep value to the business, the whole goal is to create a system where that's what you're doing all day, every day is adding right value to the business.

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00:22:30.570 --> 00:22:37.430

Stephanie Bogan: And so we can't do that without a clear vision. We can't do that without the mindset and the habits, not just for us.

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00:22:37.970 --> 00:22:44.960

Stephanie Bogan: but, ladies and gentlemen, you were. All this is the hard part, you're all setting an example for your teams.

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00:22:45.920 --> 00:22:48.070

Stephanie Bogan: This is what leadership looks like.

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00:22:50.630 --> 00:22:52.720

Stephanie Bogan: That's big. this

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00:22:52.870 --> 00:23:01.839

Stephanie Bogan: Laura Ryan Chase. Ed Kevin, you are literally and I am really grounding myself in this, too, this year, like.

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00:23:01.860 --> 00:23:06.490

Stephanie Bogan: I'm literally showing up to my team. And I'm saying, this is what leadership looks like.

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00:23:07.560 --> 00:23:09.050

Stephanie Bogan: What's what's that look like?

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00:23:09.330 --> 00:23:12.699

Stephanie Bogan: Like? Most of us don't even take time to figure that out.

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00:23:13.360 --> 00:23:22.340

Stephanie Bogan: So we're coming at this from a lot of angles this year. Right, you're gonna get vision and time and this and that like, it's okay. Just take the pieces that really land. But, Laura.

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00:23:23.320 --> 00:23:29.090

Stephanie Bogan: right, Ryan, I'm just cause I see you guys on the screen. That's how you get named.

See, I see your name

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00:23:29.280 --> 00:23:33.370

Stephanie Bogan: literally. What is the vision that we want to create?

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00:23:34.120 --> 00:23:35.540

Stephanie Bogan: What's the vision chase.

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00:23:35.700 --> 00:23:41.609

Stephanie Bogan: Danny, like what are the mindset and habits that we need to build as a firm to get there.

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00:23:41.840 --> 00:24:04.440

Stephanie Bogan: Period period. I don't care if their marketing habits. I don't care if their time habits. I don't care if their service, habits, or work like this is, you guys, this has nothing to do with the business of the business. This has to do with your relationship to the business. Can you get radically clear on what you want to create and why and when you do that, everything else gets easier to.

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00:24:04.680 --> 00:24:11.329

Stephanie Bogan: If you're clear on that chase, can we create the mindset and the habits as leaders? And then as a team

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00:24:11.800 --> 00:24:29.219

Stephanie Bogan: that are gonna create that reality because our mindset and our habits, we know right? Math is math. One plus one is one like. That's how the math works. How do we? How do we bring that to our organizations? Right? Whether it's morning routines or daily meetings? We can talk about a million different ideas which we have this quarter.

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00:24:30.020 --> 00:24:35.839

Stephanie Bogan: The goal is to say, I'm going to lead my team in mindset and habits.

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00:24:36.050 --> 00:24:48.839

Stephanie Bogan: We like to call those systems. We have team meetings and huddles and Asana boards, but the framework is positive mindset and habits like we're like navy seals, meets Oprah Winfrey. That's our business model.

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00:24:48.890 --> 00:24:55.359

Stephanie Bogan: right? You gotta love. And you gotta be operationally excellent like, that's our business model.

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00:24:55.730 --> 00:25:04.050

Stephanie Bogan: And we're constantly tweaking to that. Third is, how are you gonna hold yourself and your teams personally accountable? This is the

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00:25:04.170 --> 00:25:05.730
Stephanie Bogan: hard disk.

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00:25:07.430 --> 00:25:08.170
Stephanie Bogan: Kevin.

131
00:25:09.420 --> 00:25:34.040
Stephanie Bogan: What does 2 x look like? What does 3 x look like? Jason, what is 5 x look like? And I'm not saying like those numbers. Cause growth is the goal. I'm just saying, we're all pretty aspirationally oriented. We want to do amazing work, have more impact and affect more lives, which means we've got to build businesses to scale ladies and gentlemen with all the love in my heart. You're awesome, but you're not scalable. We have to move from the self

132
00:25:34.090 --> 00:25:40.640
Stephanie Bogan: to the system. And that's what leaders is all about, Sarah. How do I take the awesome? That is Sarah.

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00:25:40.690 --> 00:25:50.909
Stephanie Bogan: cause we know you love your people, and they're mate right? And how did they feel wrapped in that like? How does every single client that comes to your firm feel wrapped in that love.

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00:25:51.820 --> 00:26:00.879
Stephanie Bogan: even if it's not you, if it is great. But when you think about for most of you. At some point. There's a question around value and transition.

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00:26:01.330 --> 00:26:09.360
Stephanie Bogan: even if you're not there yet. The question is still like, How do I build a business that if I needed to replace myself that I could.

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00:26:10.310 --> 00:26:15.990
Stephanie Bogan: And then what were the habits in the mindset of that organization? And then what are the systems that really help us to create that?

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00:26:16.500 --> 00:26:23.260
Stephanie Bogan: So that's really what this month, if I can't even click forward, not charge, I can't click. Might be on a hours have been revoked.

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00:26:25.600 --> 00:26:27.419
Stephanie Bogan: There we go. Accountability.

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00:26:29.830 --> 00:26:32.080
Stephanie Bogan: Who's feeling accountable this year?

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00:26:34.870 --> 00:26:37.419

Stephanie Bogan: I'm feeling accountable. How about you, Laura?

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00:26:39.360 --> 00:26:40.490

Stephanie Bogan: Feel accountable?

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00:26:41.250 --> 00:26:47.779

Ihinton: I'd say, yes, yeah. with so much change. And going through this program

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00:26:48.250 --> 00:26:50.320

Stephanie Bogan: for sure. What about you, Mark?

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00:26:51.630 --> 00:26:59.039

Mark Wade: Oh, I'm totally accountable. It's it's an it's an exciting time to be in my business and be Mark Twain

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00:26:59.570 --> 00:27:08.400

Stephanie Bogan: dude. It is the best. You guys. It is the best time to be an advisor. Oh, my gosh! Everyone's on fire! Everyone loves it, everybody needs it

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00:27:08.600 --> 00:27:14.569

Stephanie Bogan: like this is the moment that everyone has been waiting for. And now our job.

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00:27:14.860 --> 00:27:20.639

Stephanie Bogan: the work the hard work, because everybody can show up. Mark with love heaven

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00:27:21.340 --> 00:27:22.570

Stephanie Bogan: and be talented.

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00:27:22.970 --> 00:27:23.910

Sarah.

150

00:27:24.770 --> 00:27:25.929

Stephanie Bogan: Everybody can.

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00:27:26.450 --> 00:27:34.360

Stephanie Bogan: and they can help 80 to 120 clients the next level. The reason that you're in leaders is because it's about scaling growth

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00:27:34.390 --> 00:27:35.650

Stephanie Bogan: beyond you.

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00:27:36.430 --> 00:28:03.470



Stephanie Bogan: which means that we have to build that ownership and that attitude in that mindset into the firm. And then ultimately, it is all about building accountability for ourselves which we're working on a ton this quarter. But now, what you're gonna notice is, the shift is now, as we start to build accountability for our team. So as we hit March and May, it's gonna be? How do we be accountable for the client model? How do we get accountable for the staffing model?

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00:28:03.470 --> 00:28:16.729

Stephanie Bogan: How do we get accountable for the growth model. Right? Because, Kevin, Laura, Chris, Mark, we ultimately get to make those decisions. And so that's the space we really want to sit in this month is.

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00:28:17.340 --> 00:28:22.829

Stephanie Bogan: can we be radically honest with ourselves about what we have created.

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00:28:24.800 --> 00:28:27.520

Stephanie Bogan: what it's going to take to get to the next level.

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00:28:28.480 --> 00:28:36.029

Stephanie Bogan: and how we sit in that accountability gap. Not not just mark great with tiff. And, Jared, you guys will see them in March

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00:28:36.130 --> 00:28:42.860

Stephanie Bogan: when we started their whole transformation process. My first missive to them was, sit down with your team and tell them you messed up.

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00:28:43.800 --> 00:28:51.670

Stephanie Bogan: That was miss, like, just down with team. It'd be like, Hey, we're doing a did you? Transition? There's a lot of stuff going on. We haven't gotten it all right.

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00:28:51.700 --> 00:28:55.330

Stephanie Bogan: and no idea. But here's what we're doing, going forward

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00:28:56.340 --> 00:29:14.320

Stephanie Bogan: and over the course of 12 to 18 months. They have literally completely transformed their team into a team, not of people waiting for them to be told what to do. But mark a team of people who are like, Hey, let's go do it. And that's ultimately what we all want. Right? We're like, how do we do this?

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00:29:14.700 --> 00:29:21.629

Stephanie Bogan: So this month, we want to really have a conversation around, how are we creating accountability for ourselves

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00:29:22.360 --> 00:29:23.780

Stephanie Bogan: as leaders



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00:29:24.050 --> 00:29:26.619

Stephanie Bogan: teams? We're gonna talk a lot more about

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00:29:27.170 --> 00:29:42.030

Stephanie Bogan: over the course of this year and future years. What I want you guys to get really grounded in is, how are you creating accountability as leaders. And that's where the Kpis really start to kick in. So this is the the what we'll call the light version

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00:29:42.150 --> 00:29:50.509

Stephanie Bogan: of the Kpi worksheet. So Kpis key performance indicators. It's a very consulting term. We all love it.

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00:29:51.140 --> 00:30:06.299

Stephanie Bogan: Consultants have to measure things right. So kpis or key performance indicators are what are the yardsticks of measurement, Kevin, so that we can see that we go from 100 to 150 like? Did it affect the results that we wanted.

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00:30:06.720 --> 00:30:17.689

Stephanie Bogan: So one Kpis translate goals into clear performance benchmarks, which is the number one challenge that we have as leaders. We have this great goals. Oh, we're gonna triple.

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00:30:17.710 --> 00:30:24.829

Stephanie Bogan: and we have no way to manage it on the back end. Are we on track? Are we doing the right things? Do our decisions align.

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00:30:25.000 --> 00:30:35.439

Stephanie Bogan: right? So we need have you guys ever like, I'm I'm in Park City and we have this road right? We're like, we're in ski town right and go down the road. And there's that box on the side of the road. You guys have those Kevin.

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00:30:35.490 --> 00:30:37.260

Stephanie Bogan: where the speed limit shows up.

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00:30:38.260 --> 00:30:51.390

Stephanie Bogan: and it's like you're going 37, and a 35, and I'm like, Oh. I did not. Oh, no, no, seriously. There, you know there's a there's a speedometer on your car right?

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00:30:52.200 --> 00:30:56.530

Stephanie Bogan: So if there's this pedometer on my car, why do I need the box?

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00:30:57.460 --> 00:31:09.700

Stephanie Bogan: And I need the box? Because I get used to the speedometer on my car, Kevin, and I'm just doing my thing like I'm showing up. I'm having meetings. The great. This pedomet on the side of the road, says.



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00:31:10.110 --> 00:31:18.779

Stephanie Bogan: Hey, Steph, this is how you're growing compared to how you want to grow. Are you okay with that? And I'm like, Oh, oh, actually, no, I think I want to do something about that.

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00:31:19.580 --> 00:31:25.829

Stephanie Bogan: We don't have that feedback, Kevin. Mark Laura, when you're in a firm. The feedback loop is your paycheck.

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00:31:25.890 --> 00:31:30.190

Stephanie Bogan: and that's cool. It's really great. But as an organization.

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00:31:30.780 --> 00:31:35.560

Stephanie Bogan: we need to know if we're moving in the right direction. So, Kevin.

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00:31:35.670 --> 00:31:48.239

Stephanie Bogan: if I say that my goal is a 3 million dollar practice. And I want I'm just making this up a hundred, \$30,000 a year. Clients seems like a great goal, right? And then

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00:31:48.310 --> 00:31:53.329

Stephanie Bogan: \$10,000 a year client that's growing comes along. And I'm like

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00:31:56.240 --> 00:31:59.020

avenue-wise, my bar's gonna go up

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00:31:59.430 --> 00:32:10.460

Stephanie Bogan: revenue indicator. Gonna go up by \$19,000. But what's gonna happen to my revenue per client or my revenue per advisor? If my goal is 30

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00:32:10.610 --> 00:32:12.030

Stephanie Bogan: and this guy's 19,

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00:32:13.680 --> 00:32:15.870

Stephanie Bogan: what happens just pure math. Kevin

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00:32:17.390 --> 00:32:18.390

Stephanie Bogan: goes down.

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00:32:18.920 --> 00:32:41.179

Stephanie Bogan: So while the indicator in the industry is all revenues, good revenue, all growth is good growth. What we are not taught is to be discerning about the growth that we drive, and that is the great misnomer in this profession. I can have 300 clients that I can create mediocre value, or I can have a hundred clients where I can deliver deep



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00:32:41.240 --> 00:32:44.379

Stephanie Bogan: hyperspecialized value and really crush it.

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00:32:44.860 --> 00:32:54.260

Stephanie Bogan: So the goal is whether you have 100 clients to your client base, or a thousand, or like. I have 10,000. I have clients that are like 10,000 clients in their firm.

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00:32:55.810 --> 00:33:02.959

Stephanie Bogan: What are your key performance indicators? What are your revenue? Your. So I look at revenue per client.

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00:33:03.220 --> 00:33:11.780

Stephanie Bogan: profit per client, revenue per employee, and profit per employee is my productivity measures. If the industry averages 350,

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00:33:11.830 --> 00:33:20.689

Stephanie Bogan: then we should be at least there, or better. Right? So that's how we hey, Kevin? If I hire another advisor a million dollars, and it's just me

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00:33:20.740 --> 00:33:28.209

Stephanie Bogan: I went from a million dollars per advisor to 500,000 per advisor. If I hired someone. So my average just went down.

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00:33:28.620 --> 00:33:31.160

Stephanie Bogan: So by all accounts, that'd be bad right?

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00:33:32.290 --> 00:33:37.580

Stephanie Bogan: No, that'd be great if I'm scaling growth. Got my Roi.

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00:33:41.020 --> 00:33:50.379

Stephanie Bogan: So, Kevin, you're at a million dollars. We hired 2 advisors in this example. We've just now

196

00:33:50.390 --> 00:33:59.619

Stephanie Bogan: who, at whichever Kevin wants to jump in, there we go. That's the joy of being Kevin. In this we get 3 Kevin's. whoever does right?

197

00:34:01.240 --> 00:34:04.250

Stephanie Bogan: So, Kevin, I've just doubled my revenue.

198

00:34:06.120 --> 00:34:09.000

Stephanie Bogan: But what's my revenue Per advisor



199

00:34:09.570 --> 00:34:10.910

Stephanie Bogan: in that scenario.

200

00:34:11.969 --> 00:34:25.459

Stephanie Bogan: So most of you, by the way, if I go into your firms and I'm like, Oh, look! You're doing 1.5 million. You've got one or 2 or 3 advisors. It's 95% of the time. It's not Mark.

201

00:34:25.630 --> 00:34:31.430

Stephanie Bogan: Bob and Jack, each doing \$666,000. It's Mark doing

202

00:34:31.440 --> 00:34:44.449

Stephanie Bogan: 900,001 person doing 200,001 person doing 150,000 right? We've got like the super producer, and then the next Gen. Producers who are coming along for most of you.

203

00:34:44.500 --> 00:34:55.780

Stephanie Bogan: So what we want to do is there's a tool that we'll have. We'll talk about it more in March and May is a team model version of this, which is one. Do you have firm level metrics in place?

204

00:34:56.320 --> 00:34:57.609

Stephanie Bogan: What's your revenue.

205

00:34:57.900 --> 00:35:13.120

Stephanie Bogan: Basic Kpi. What's your revenue? What's your revenue per advisor went to revenue per head count? Which total number of clients like this is your basic accounting for right financial model. And then the goal is to improve these numbers over time.

206

00:35:13.550 --> 00:35:19.819

Stephanie Bogan: So this gets really cool in leaders which hey, mark if we want to double or triple the firm.

207

00:35:19.830 --> 00:35:24.410

Stephanie Bogan: We are not going to just double or triple the numbers right? Cause that would be

208

00:35:25.080 --> 00:35:29.340

Stephanie Bogan: multiplying the current inefficiency. Right? If we're gonna go from 3 million, and

209

00:35:29.420 --> 00:35:31.789

Stephanie Bogan: I'm just making it up right? 10 people.

210

00:35:32.380 --> 00:35:39.010

Stephanie Bogan: 6, 9 million should mean 30 people. Right? So that's where we start to look at efficiencies in the model.



211

00:35:39.480 --> 00:35:41.869

Stephanie Bogan: If our current revenue per advisor is

212

00:35:41.930 --> 00:35:55.650

Stephanie Bogan: 250,000, our goal is to get that to 700,000, which is the industry average? Right? How do we get every advisor to about that number? And then when we get to 75% of that number that tells us time to hire the next advisor.

213

00:35:56.350 --> 00:36:02.820

Stephanie Bogan: So this is your feedback loop that says, What's your revenue and profit per client

214

00:36:02.960 --> 00:36:08.569

Stephanie Bogan: for advisor advisors. You guys, you are the I say this with all love. You are the income engine.

215

00:36:08.900 --> 00:36:09.670

Stephanie Bogan: Kevin

216

00:36:09.920 --> 00:36:25.850

Stephanie Bogan: Kevin, whichever Kevin was right, you do you? That's one thing. The person next to you is another income engine. The advisor. Next to them is another intimation. The biggest challenge in this space is that growth is all about the founder.

217

00:36:25.990 --> 00:36:29.060

Stephanie Bogan: And we haven't built that G 2 income engine

218

00:36:29.570 --> 00:36:31.250

Stephanie Bogan: which we're going to talk about this year.

219

00:36:31.370 --> 00:36:34.050

Stephanie Bogan: Step one is getting really clear on the data.

220

00:36:34.160 --> 00:36:44.199

Stephanie Bogan: So for your firm, what is the average? This is like the highest. We have a very detailed tool. If you want to go deep, let us know this is Step one.

221

00:36:44.510 --> 00:36:57.920

Stephanie Bogan: What's our revenue? What are our expenses? What are our clients? What's our general profit for great Kpi like? How much money are we squeezing out of each client that we work with? And I say that with all of right, through the system of delivering value.

222

00:36:58.510 --> 00:37:04.670



Stephanie Bogan: because all that process and love, and one page all of that

223

00:37:05.240 --> 00:37:22.630

Stephanie Bogan: boils down to this. How many clients do you have? What are the ratios? And when we talk about right sizing your client base, and those ratios which are going to do in March and the next quarter. That's what it's all about is, if I, Kevin, this is the cool, cool, cool thing

224

00:37:23.510 --> 00:37:26.110

Stephanie Bogan: I call them independence indicators.

225

00:37:26.730 --> 00:37:29.320

Stephanie Bogan: And what I mean by that is a business owner.

226

00:37:30.230 --> 00:37:34.779

Stephanie Bogan: If you could give me 5 or 6 data points that would tell me

227

00:37:35.780 --> 00:37:43.579

Stephanie Bogan: everything in my business is humming along, and everybody's doing a great job. I don't need to show up. Would that not be awesome?

228

00:37:46.170 --> 00:37:46.870

Stephanie Bogan: Yes.

229

00:37:47.300 --> 00:38:08.880

Stephanie Bogan: So we love to talk about kpis, right? Key performance indicators. I love to talk about independence indicators. So this is the first step to you all deciding what your independence indicators are. Kevin, what are the 5 or 6 pieces of data that if your team could give me and those data points were solid.

230

00:38:08.940 --> 00:38:21.699

Stephanie Bogan: I would know I never needed to call, look or show up again. I'm not saying you're ever gonna do that. I'm just saying, what data points could the business give you, Rob, that you would be like? Actually.

231

00:38:21.940 --> 00:38:25.759

Stephanie Bogan: I don't need to go. Everybody's crushing it.

232

00:38:26.850 --> 00:38:29.370

Stephanie Bogan: We don't know those data points.

233

00:38:30.080 --> 00:38:34.290

Stephanie Bogan: So that's step one. What are your key data points for the company?

234



00:38:34.820 --> 00:38:41.430

Stephanie Bogan: Where do you want them? So when we think about our 3 year or 5 year goals, and we start to map right? Multiply out.

235

00:38:41.510 --> 00:38:49.579

Stephanie Bogan: Robert. We don't want to multiply the number of people and the number. Usually we don't want to triple everything right. We want to get more efficient in the process.

236

00:38:49.960 --> 00:38:53.520

Stephanie Bogan: And that's what we want to look at. Step one is, how are we doing.

237

00:38:54.220 --> 00:39:01.880

Stephanie Bogan: You have to have that feedback loop that, as a business owner says to you, Laura, Mark, Robert Kevin.

238

00:39:02.290 --> 00:39:13.079

Stephanie Bogan: this is how you're doing. It's that box on the side of the road when I pass Currents Boulevard every time it's right there. It's like you're going 36 under 35, and I'm like, I know I live here.

239

00:39:13.170 --> 00:39:15.350

Stephanie Bogan: but it's there every day.

240

00:39:16.320 --> 00:39:32.380

Stephanie Bogan: What the Kpi worksheet is. Your speedometer on the side of the road every day. That, says Robert, you said you wanted to build this kind of practice where each income engine manages this kind of revenue, this kind of profit, and you have this kind of value in this kind of life. Are you hitting it?

241

00:39:34.040 --> 00:39:40.450

Stephanie Bogan: And we need those indicators to tell us and our teams, because we hate being the bad guys. By the way.

242

00:39:40.480 --> 00:39:50.809

Stephanie Bogan: what the bar is, hey? Our revenue per advisor goal is 500,000 or 700,000. So until you hit that goal, you're not going to be moving it up the left.

243

00:39:51.580 --> 00:40:06.150

Stephanie Bogan: right? How? How do you share responsibility? So there's so many things that come from it. But the fundamental go goal is your your success up to this point has been you being awesome at being you

244

00:40:06.890 --> 00:40:09.160

Stephanie Bogan: love you. So get it

245

00:40:09.960 --> 00:40:20.439



Stephanie Bogan: and rob mark Laura the goal. Kevin is no longer about you being awesome. It's about you building a business that is awesome beyond you.

246

00:40:20.960 --> 00:40:29.420

Stephanie Bogan: which means, if I gave you this worksheet, Robert, and you said, as long as this worksheet says acts, I don't go in. It's awesome

247

00:40:29.900 --> 00:40:36.340

Stephanie Bogan: as a business owner. That's what I want. I want those 5 data points that are like everything's awesome. Don't need to go.

248

00:40:36.600 --> 00:40:46.349

Stephanie Bogan: And I want those data points and say, Hey, that trip to Turkey. It's really great. But those data points say you gotta stop and pay attention because your team is not performing and they need your help.

249

00:40:47.210 --> 00:40:54.589

Stephanie Bogan: And so that's what we want to give ourselves as a business, as leaders, guys, and gals. It is not about measuring your performance.

250

00:40:54.670 --> 00:41:00.480

Stephanie Bogan: Your performance measurement up to this point in time has been how much money did I make this year?

251

00:41:01.480 --> 00:41:05.620

Stephanie Bogan: Honestly, did I make more money? Yes, couldn't go me

252

00:41:05.780 --> 00:41:15.220

Stephanie Bogan: now we're talking about? Did I build value? Did I build a team, and then ultimately, can I monetize that value beyond me and things like this?

253

00:41:15.700 --> 00:41:27.910

Stephanie Bogan: I got to tell you we do a lot of M. And a work with succession, and M and a, and equity and invest like they love this stuff because what they ultimately want to know is, are the clients profitable. And you can. Can you create more of them?

254

00:41:28.410 --> 00:41:39.319

Stephanie Bogan: And this is something that says, Look, we can produce on average, \$727,000 per advisor. Do you think that makes your your premium value go up or down?

255

00:41:40.340 --> 00:41:41.380

He had to guess.

256

00:41:44.920 --> 00:41:45.740



Stephanie Bogan: Yes.

257

00:41:45.910 --> 00:42:01.120

Natalie Bergsma: I think it ties into a a great question that Liz had staff around like, what's the recommended revenue per advisor one? There are benchmarks that you can look at right. What is the average or the industry. And here's the good news. Those are great

258

00:42:01.350 --> 00:42:03.780

Natalie Bergsma: guide posts at best.

259

00:42:04.250 --> 00:42:17.669

Natalie Bergsma: but going back to your vision and your purpose, and the time you, the team. You want to build your business model, the type of services that you want to deliver. That's where you have to take benchmarks and then say, what are my numbers?

260

00:42:18.250 --> 00:42:21.459

Natalie Bergsma: What is it that we want to shoot for?

261

00:42:21.490 --> 00:42:23.429

Natalie Bergsma: Right? If I'm working with

262

00:42:23.440 --> 00:42:35.330

Natalie Bergsma: ultra high net worth clients, my revenue per advisor is gonna look very different than I'm working with high net worth clients. Right? So part of it's like, what are the services that we're delivering? So set a goal.

263

00:42:36.310 --> 00:42:50.160

Natalie Bergsma: an informed goal, right? Use benchmarks as a baseline, but then set your own goal as a business, and then measure to that and keep it consistent right. The important thing is is measuring data is about measuring it consistently.

264

00:42:50.490 --> 00:43:04.279

Natalie Bergsma: So the reason we do this is, if I say, Hey, my revenue per advisor is 700,000 as an industry average. I feel really good about that. Or I want to be at a million. If I hired that second advisor, that number is gonna Drop.

265

00:43:04.730 --> 00:43:08.280

Natalie Bergsma: But what you should see over the next year

266

00:43:08.440 --> 00:43:16.610

Natalie Bergsma: is you moving back? Progress widens towards that number. If you're a year out and you haven't made it back

267

00:43:16.850 --> 00:43:30.150



Natalie Bergsma: to that number. That data is telling you a story. And that story is, hey? Something behind the scenes isn't working now. Maybe it's that, hey? That advisor didn't create the capacity that I thought they would, because

268

00:43:30.380 --> 00:43:46.620

Natalie Bergsma: I still have all my old bad habits, and I'm not managing the way that I should. I'm still holding on to control, and I need to let that go more. Or maybe it's hey? I got the capacity and the leverage. But I'm still not spending my time on revenue, producing activities, marketing, growing the firm.

269

00:43:46.790 --> 00:43:55.110

Natalie Bergsma: I'm still stuck in my email habit where I'm checking my email on a regular basis. So that's why this is so important is because

270

00:43:55.900 --> 00:43:58.319

Natalie Bergsma: data is not just numbers

271

00:43:58.390 --> 00:44:24.679

Natalie Bergsma: data's information that's going to allow you to create informed decisions, and to see if you're measuring progress right? Not just so like what everyone out there is doing and what the average is, because, quite frankly, there's so many different kinds of firms in those averages. You have to get really clear, and who you are, what you want. Decide on how you measure it and go from there. I think another way.

272

00:44:24.790 --> 00:44:35.129

Natalie Bergsma: and I see a lot of firms. Struggle is the way that a lot of us set up our firms is this LLC's. And we pass through, and we get whatever we take home right.

273

00:44:35.260 --> 00:45:03.769

Natalie Bergsma: But if I'm coming into your firm and I'm doing evaluation, that's on how I look at it. I wanna know what's it costs for you to be an advisor in your organization. So we set aside, even though we're not doing it for our CPA. Hey? My direct expenses for professionals, including myself, even if you're not quite taking that home yet, should be. Hey? I'm a senior wealth advisor, I should be making at least a hundred \$65,000. I could drop everything. Go get a job

274

00:45:03.770 --> 00:45:11.669

Natalie Bergsma: making that today. Right? So when you plug that number into the metrics, you see what it really looks like when you run your business

275

00:45:11.740 --> 00:45:26.409

Natalie Bergsma: as a business instead of as that ATM machine, where you just get whatever comes out at the end of the day. So those are some of the things we're creating, these KPIs. They help transition you from accidental entrepreneur to

276

00:45:26.410 --> 00:45:46.400

Natalie Bergsma: truly evolved business owner. Right? You don't run a fortune. 500 company without



data and metrics. Right? You know what everybody gets paid what their profit versions are down to like the level of data, there is well beyond what we have in most advisory firms, but we all need a place to start. So, Liz, I think you know for me

277

00:45:46.550 --> 00:45:59.050

Natalie Bergsma: it's getting clear on who you serve, and making sure that you're kind of meeting those numbers. It's also getting really clear on how we push back and measure capacity, which is one of the hardest things

278

00:45:59.140 --> 00:46:12.159

Natalie Bergsma: to measure. Because here's the answer right. We all know that our time will get filled with, however much we put into it. So if I say that my average revenue per revisor is 2 50,

279

00:46:12.380 --> 00:46:31.309

Natalie Bergsma: I will make my time show up where my average revenue per advisor is 2 50. So actually setting goals that push us here a little bit farther than where we should be, and then checking in, how well is that working? Have we pushed past our threshold right, creating that feedback loop

280

00:46:31.380 --> 00:46:42.129

Natalie Bergsma: around it, so you can also use them with your teams. If you know your average revenue per advisor is this, and you have an advisor showing up below that it gives you the opportunity to sit down and say, Hey, what's going on?

281

00:46:42.580 --> 00:47:11.529

Stephanie Bogan: And they might say, Well, I've got some personal stuff going on in my life, and I'm really struggling to keep up right now, or they might say, I'm you know, spending all this time getting my Cfp. And right. So that's you know, they're taking time away from that space. So it's again, it's that data that allows for those deeper evaluations and conversations to figure out, what do we need to do to keep moving in the right direction? We had a leaders member that's been in lifestyle for 3, 4 years, leaders a couple of years.

282

00:47:11.640 --> 00:47:19.989

Stephanie Bogan: And she had a great business, you know, 1 million dollar plus firm. But she had a divorce branch, and this branch, that branch.

283

00:47:20.030 --> 00:47:29.260

Stephanie Bogan: and none of them was operationally profitable on its own merit. Right? If you took like a relative amount of business expense, etc.

284

00:47:29.400 --> 00:47:45.850

Stephanie Bogan: And so she was growing. I'm growing my way into profitability is the big mistake to make here like I can't. I've got clients or 1 billion dollar firms. They're like, Oh, we're growing a profit. And they're literally 2 billion dollars. And they're like at 2 billion will be profitable

285

00:47:46.040 --> 00:47:54.380

Stephanie Bogan: like, no joke. You guys are like giggling right? But literally, I have clients at 500 million

that are like at 5, at a billion. I'll be profitable, Billy.

286

00:47:54.510 --> 00:47:56.349

Stephanie Bogan: because you take you with you

287

00:47:57.650 --> 00:48:02.400

Stephanie Bogan: because you take you with me. So the goal here to Natalie's point

288

00:48:02.610 --> 00:48:07.739

Stephanie Bogan: is to instill. I know it's still my beating heart. A bit of discipline.

289

00:48:08.490 --> 00:48:18.959

Stephanie Bogan: it says, now this is the light version that says, Hey, business. This is how we're performing against our 3 year goal.

290

00:48:19.370 --> 00:48:26.290

Stephanie Bogan: This is how we're performing. So that client. It was a little bit below the minimum that looked. Gran felt great.

291

00:48:26.670 --> 00:48:28.679

Stephanie Bogan: Robert, does the bar go up or down?

292

00:48:29.550 --> 00:48:33.190

Stephanie Bogan: The bar goes down, and then you're like, that's not what I wanted.

293

00:48:33.580 --> 00:48:59.119

Stephanie Bogan: So it is a lens of feedback. And if the problem is is business owners, the only feedback lens that we have. 97% of the time is, how much money did we make last year? And if we made great money, it says, Go do more of that the problem is that is wildly inefficient, which is what you're here this year to figure out right? Who are the clients? What story? How do we reach them.

294

00:48:59.180 --> 00:49:07.339

Stephanie Bogan: But this is the backstop that says, Hey. I want you now to all take Kevin, your 3 year goals

295

00:49:09.100 --> 00:49:19.239

Stephanie Bogan: and build a version of this. So if my goal now is revenue per advisor of 400,000, and my new goal is right, 750 as a target.

296

00:49:19.270 --> 00:49:37.490

Stephanie Bogan: what do I know I need to do right. I've got a channel growth into those advisors, make sure they can handle it right, move them up or out, and then I have to build a machine, fill the pipeline, build advisor next, pipeline, next advisor. Right? So we can talk about that from a scaling growth perspective and onboarding, and all the good stuff.



297

00:49:37.860 --> 00:49:56.669

Stephanie Bogan: This is the dashboard that sits in your card that says you're following the guidelines, and we are the box dots on the freeway. Do you guys know those. mark? You know the freeway when you're like, but but but but but you're like at 110'clock at night you go. But but but but those were actually invented by an emergency room doctor named Dr. Bot.

298

00:49:57.050 --> 00:49:57.849

who knew.

299

00:49:58.300 --> 00:50:10.150

Stephanie Bogan: and he invented them because he got incredibly tired of people coming in at 2 in the morning, all right, muffed up because they were coloring outside the lines. They were falling asleep at the wheel.

300

00:50:10.570 --> 00:50:14.160

Stephanie Bogan: The kpi worksheet. Ladies and gentlemen. Chris.

301

00:50:14.230 --> 00:50:26.320

Stephanie Bogan: Heaven, Rob, this is your way of saying I'm not following a sleep at the wheel, and for teams, ladies and gentlemen, the hardest part of what you do. Now, Mark, it's not about being successful.

302

00:50:26.350 --> 00:50:27.870

Stephanie Bogan: You've been successful.

303

00:50:28.070 --> 00:50:30.660

Stephanie Bogan: Go you seriously awesome.

304

00:50:30.720 --> 00:50:32.790

Stephanie Bogan: You're all here because you're successful.

305

00:50:32.840 --> 00:50:37.909

Stephanie Bogan: The next level of scaling growth is, how do you build success beyond yourself?

306

00:50:38.920 --> 00:50:42.109

Stephanie Bogan: That, hey? Good work. That's a question. Yeah, go ahead.

307

00:50:42.130 --> 00:50:49.030

Chris Wedell: Okay and may. And maybe this is just me, and so we can take it outside. But the mindset part of

308

00:50:49.400 --> 00:50:52.870



Chris Wedell: sharing Kpis with the team is something like.

309

00:50:53.270 --> 00:51:08.380

Chris Wedell: so I have a like the idea of sharing with my team like the revenue and what I make and like the idea of. And you're just gonna do all the work. And I'm just gonna make the magic and make all this gonna be the rich

310

00:51:08.940 --> 00:51:37.499

Stephanie Bogan: bitch. Yeah, yeah, here's the honest answer. I love you so much. They know how many clients you have. They know the average. They know how much money you make. They know that you're rich bitch living it up like oh, my God! Who do you think you are, girl? That's the story in our head like? Oh, you're gonna think that I'm making so much money, and I'm not working hard enough.

311

00:51:37.720 --> 00:51:50.739

Stephanie Bogan: hey? And by the way, anytime any of you wanna go start a business and do what I'm doing you go to. I tell people every day test the market. God bless you! No.

312

00:51:51.410 --> 00:52:17.869

Stephanie Bogan: you are doubting yourself. We we sit in this space, and I'm not saying you have to tell your people the numbers you do or you don't. It's choice. We do. And my attitude doesn't have to be. Everyone's is we're on this together. Yes, you're gonna make me a ton of money, and I'm gonna make you an incredible career and income and freedom and flexibility. And if you can go get better somewhere else. You should definitely go. Do that.

313

00:52:19.150 --> 00:52:23.550

Stephanie Bogan: So you, Chris, you've got to stop apologizing

314

00:52:24.280 --> 00:52:35.780

Stephanie Bogan: for being successful like we get all guilty like I have. Can't tell you. Every year someone's like my team is gonna figure out that I'm making a half a million dollars. And they're not. And I'm like,

315

00:52:36.810 --> 00:52:41.349

Stephanie Bogan: it's almost like if they wanted to do it, they could have, but they didn't.

316

00:52:43.450 --> 00:52:54.339

Stephanie Bogan: So one I mean this with all the love in my heart. Chris. stop apologizing. I make a million dollars here. I'm not apologizing to anybody on my team for it.

317

00:52:54.760 --> 00:53:07.910

Stephanie Bogan: You know what I am doing. I'm paying them great. I'm taking care of them. I'm loving them right because we're in this together. If I can make above average pay in less than average time. My model is

318

00:53:08.170 --> 00:53:09.860



Stephanie Bogan: because this is the fair part.

319

00:53:09.890 --> 00:53:18.890

Stephanie Bogan: If you want to make above average pain in less time, and then you want to work everybody to death, like, you know, you're gonna have an issue there. That's not who you are. Right? So the goal is to share that.

320

00:53:19.740 --> 00:53:23.349

Stephanie Bogan: So how do I help my team make above average comp

321

00:53:23.500 --> 00:53:31.820

Stephanie Bogan: in less than average time. That's an incredible mission. Hey, team, we want to set a goal of being happy. High performers. We want to be

322

00:53:31.920 --> 00:53:37.960

Stephanie Bogan: American express on average. By the way, as a team, 350,000 per employee.

323

00:53:38.290 --> 00:53:44.410

Stephanie Bogan: I use that as the average. If we can't beat Amex. We're lame because that's a giant bureaucracy.

324

00:53:45.000 --> 00:53:49.119

Stephanie Bogan: So if we can't kick Mx's ass, what are we doing people

325

00:53:49.580 --> 00:54:08.700

Stephanie Bogan: right? And then we get to like, okay, so maybe 400,000 is the average. Okay. Now, we got right at X number of revenue. We get X number of people, are we on. So now it becomes a conversation. Are we on track? What do we need? Do we have the right people? Do we have the now, Chris? I'm having a conversation with my team about what it will take, hey?

326

00:54:08.910 --> 00:54:25.200

Stephanie Bogan: I was actually, I just mapped out the career path for every position in our firm yesterday, because now I'm at the point where I got managers who were in directors and drew. I'm like, Oh, like, I gotta give everyone a career path. So I like mapped it out. I was like, like, Oh, that's so awesome like. Here's the career path.

327

00:54:26.010 --> 00:54:28.129

Stephanie Bogan: I can show it to them. I'm like, here it is.

328

00:54:28.260 --> 00:54:33.719

Stephanie Bogan: Here's how you get up here. So step one, I think, to Chris's point is.

329

00:54:34.370 --> 00:54:39.730

Mark Wade: yes, you get to choose what you share. You don't have to share everything.



330

00:54:40.180 --> 00:54:46.769

Stephanie Bogan: But what you do, wanna choose is, what do you share? That sets the bar?

331

00:54:47.280 --> 00:54:51.959

Stephanie Bogan: So if the reason that you're not sharing which is 90% of the case.

332

00:54:52.050 --> 00:54:55.560

Stephanie Bogan: because we don't want people to know what we make.

333

00:54:56.340 --> 00:55:09.190

Stephanie Bogan: I would just ask you why you feel like you have to apologize for that you should be able to make a million or 2 million or 3 million dollars a year, and your team, Chris, should herald you and be like. Oh, my God! We love her! She's amazing! Look what she does!

334

00:55:09.880 --> 00:55:15.869

Stephanie Bogan: There should be no shrinking and no apologizing around how we create that income for ourselves or anyone else.

335

00:55:16.740 --> 00:55:24.549

Stephanie Bogan: I was just on. You guys will love this, because, you know, this is what I do with my free time. I was just on this big manifesting summit right with all my peers.

336

00:55:24.650 --> 00:55:27.209

Stephanie Bogan: and we like. What was the conversation?

337

00:55:27.490 --> 00:55:30.339

Stephanie Bogan: We're all gonna get rich. Oh, my God! The guilt!

338

00:55:30.740 --> 00:55:32.220

Yelt Yelt.

339

00:55:32.470 --> 00:55:45.259

Stephanie Bogan: you can't. You can't wanna get rich. That makes you add. And I was like, No, I actually wanna be super rich. Seems really awesome. Our 25 million dollar company and 25 HA week, I'm all. Why would I need to apologize for that?

340

00:55:45.920 --> 00:55:57.960

Stephanie Bogan: We are so stuck in that like? What like, I just wanna challenge all of the what about and the what if like, it's different than the kpis. But this idea of sharing

341

00:55:58.070 --> 00:56:10.049

Stephanie Bogan: or not is really a mindset conversation around. You're afraid that if you share it will



mean actual why and I'm not. I'm not judging good or bad, right or wrong. Just understand. These are all stories.

342

00:56:10.990 --> 00:56:13.960

Stephanie Bogan: Their stories. My team knows exactly how much we make.

343

00:56:14.120 --> 00:56:16.630

Stephanie Bogan: It's not you don't have to do that.

344

00:56:16.740 --> 00:56:27.670

Stephanie Bogan: by the way, but that's just my philosophy, which is like, here's our margin, right like they can pretty much calculate where all the money goes. They know that I make a boat load money.

345

00:56:28.930 --> 00:56:29.720

Stephanie Bogan: But

346

00:56:30.010 --> 00:56:44.770

Stephanie Bogan: you're not gonna go find a great place to work with freedom and flexibility right? Like I. My, my job is to create that same kind of opportunity for my team. If I can't, then, Chris, yeah, they're all gonna bail, because what who wants to make me richer like? That's no fun.

347

00:56:45.250 --> 00:56:54.909

Stephanie Bogan: They'll make you richer if right, they're enriching themselves to the process. And that's where I don't care if you show the profit like. What's the goal?

348

00:56:55.740 --> 00:57:07.490

Stephanie Bogan: What are the standards to get to that goal? Did we meet those standards is where you can write, align comp and incentives right as as you want to if you will.

349

00:57:08.320 --> 00:57:10.690

Stephanie Bogan: Stephanie, I have a question for you. Yeah, go for it.

350

00:57:11.110 --> 00:57:13.430

Ryan Wyatt: What? If

351

00:57:13.560 --> 00:57:18.899

Ryan Wyatt: like. gonna try to word this as clearly as possible. This is something I've been struggling with lately.

352

00:57:19.280 --> 00:57:24.600

Ryan Wyatt: What if part of like that delegating process

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00:57:24.830 --> 00:57:29.160



Ryan Wyatt: like, what if there's some guilt in that meaning?

354

00:57:29.690 --> 00:57:36.590

Ryan Wyatt: The stuff that I'm passing to. You know newer employees at the firm is stuff that I would do

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00:57:37.040 --> 00:57:38.740

Ryan Wyatt: don't want to do.

356

00:57:39.270 --> 00:57:48.579

Ryan Wyatt: But my reason for why I would do. It is a lot different than the reason that they need to do it. And it's just that it needs to get done. I understand what the long term is.

357

00:57:48.660 --> 00:57:53.829

Ryan Wyatt: we need to do it to move forward, but I almost feel bad like I hate planning.

358

00:57:54.090 --> 00:58:00.240

Ryan Wyatt: but if I need to do it I'll do it. I don't like being on the technical side, but so then I feel bad just

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00:58:00.390 --> 00:58:06.680

Ryan Wyatt: bombing a service adviser with that kind of stuff. But the more I'm involved in it, the slower we're going to grow.

360

00:58:06.790 --> 00:58:07.760

Ryan Wyatt: So

361

00:58:08.290 --> 00:58:12.930

Stephanie Bogan: so what do you apologize? I hear Liz Liz, I think, is in my head right now.

362

00:58:12.970 --> 00:58:14.159

Stephanie Bogan: Liz is like

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00:58:14.690 --> 00:58:15.390

Jessie.

364

00:58:16.150 --> 00:58:17.550

Stephanie Bogan: What are you apologizing for

365

00:58:18.340 --> 00:58:20.800

Ryan Wyatt: giving them stuff that I hate doing?

366

00:58:21.130 --> 00:58:24.900



Stephanie Bogan: So? Let me get this straight, Ryan. I just want to get really clear. You hired people

367

00:58:25.690 --> 00:58:29.620

Stephanie Bogan: to do a job. You're paying them to do that job.

368

00:58:29.930 --> 00:58:33.390

Stephanie Bogan: And then when you give them work in line with that job you feel guilty.

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00:58:33.480 --> 00:58:34.610

Ryan Wyatt: Yeah.

370

00:58:35.130 --> 00:58:46.270

Stephanie Bogan: I know. It's not saying that I'm not saying I'm highlighting it because we're everyone right. We are all there with you like. Chris is laughing, mark slap like, yes.

371

00:58:46.360 --> 00:58:50.889

Stephanie Bogan: that's the dumb shit we do. I don't understand it as humans and leaders. It's what we do.

372

00:58:50.920 --> 00:59:13.309

Stephanie Bogan: Step one stop freaking, apologizing for being awesome and being at the tippy top of the pyramid. The tippy top of the pyramid. Only 10 or 15% of the humans on the planet can do what you all do. It's why you make so much money because you're awesome and relatable, and you communicate value. Go you. It's 1015 of the population. Everyone else has to be taught.

373

00:59:13.720 --> 00:59:18.690

Stephanie Bogan: You're all honing your skills along the way. So, Ryan, it's totally okay to say

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00:59:19.810 --> 00:59:34.779

Stephanie Bogan: I'm I'm good at this, and I'm gonna give you the rest of that. I'm not like. There's no apology. There's like, just understand. That is a story in your head about. I can't be better than I can't delegate. Who am I to right? It's some version of that.

375

00:59:36.010 --> 00:59:39.389

Ryan Wyatt: Okay, I mean, I just, I think about. I think of it from.

376

00:59:39.830 --> 00:59:52.589

Ryan Wyatt: If I were in their shoes like the stakes, are different from me. If I were in their shoes I wouldn't. My career longevity doing the stuff that I'm passing them like I just probably wouldn't stay with it long term. So

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00:59:52.620 --> 00:59:58.360

Ryan Wyatt: that that's where a little bit of the guilt comes from, but is maybe a better mindset to have



378
00:59:58.810 --> 01:00:00.490
Ryan Wyatt: look.

379
01:00:00.910 --> 01:00:06.990
Ryan Wyatt: We hired them, and we were very clear what we hired them for, and I'm gonna give them the stuff that I said that I was gonna give them.

380
01:00:07.370 --> 01:00:21.129
Ryan Wyatt: They're either going to take that and and do very well with it, and then grow long term into a role where maybe they have people under them doing stuff that they don't like to do whatever. But the the better mindset maybe to have is

381
01:00:21.420 --> 01:00:24.780
Ryan Wyatt: for lack of better words. It's kind of a test.

382
01:00:25.240 --> 01:00:34.810
Ryan Wyatt: They're either gonna do it and do it well or they're not. And they're not going to be good good, fit for the company, and time will tell is that kind of how I should look at it rather than just feeling guilty and then not doing it.

383
01:00:35.190 --> 01:00:58.520
Natalie Bergsma: Part of what you're talking about is putting the right people in the right seats on the bus. So one, if there's work that you don't like, there should be other people in your organization who are good at doing and love that work that's getting the right people in the right seats. Advisor roles are tricky because they have this wonderful balance of influence communication people, skills

384
01:00:58.520 --> 01:01:13.269
Natalie Bergsma: and data and analytics. So here's the honest piece. You're not gonna love every aspect of that job. And that person who's in that role might not love every aspect of that job. One of the best questions is is it growing them?

385
01:01:13.420 --> 01:01:19.389
Natalie Bergsma: Is that work aligned with their level of compensation and pay in the organization?

386
01:01:19.680 --> 01:01:26.180
Natalie Bergsma: Because I don't want to take quarter and penny activities and do him them here at the top.

387
01:01:26.240 --> 01:01:45.689
Natalie Bergsma: So Jess of my team can do all the fun, the fun work right? That's not gonna result in an effective or profitable business model. And look, you're growing and mentoring people. Which means that they have to do the work that you had to do to get where you are. I remember we had a marketing admin

388

01:01:46.010 --> 01:01:56.539

Natalie Bergsma: way way back, like 20 years ago. Said she was like, I wanna I wanna run marketing, but she wouldn't do the marketing admin work. She hated it. I was like, you gotta learn how to do the job

389

01:01:56.610 --> 01:02:05.960

Natalie Bergsma: before you can get the next job. So part of what you're doing when you're delegating, we don't delegate, we're taking away people's opportunity to learn

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01:02:06.360 --> 01:02:23.429

Natalie Bergsma: to grow and to develop. And if you find that you push that work down and they're more valuable than that work that's just telling you something which is okay. Now that person's at capacity, and they have the ability to do higher level work. Now I need to leverage them so as we push

391

01:02:23.430 --> 01:02:45.500

Natalie Bergsma: our work down, it tells us where we need to create and grow leverage. I have a firmware like Heck. We need a internal financial planner. We don't want the advisers doing all of the data entry and the planning work, because we want them sitting with the clients and engaging with the clients and the data entry. Well, that's not super valuable work for them.

392

01:02:45.690 --> 01:02:54.910

Natalie Bergsma: Right? So it also helps you get clarity on what the right seats are and and how you want to do that. But don't rob people of their opportunity to grow.

393

01:02:55.580 --> 01:02:58.029

Stephanie Bogan: Okay? And look, I think the ultimate.

394

01:02:58.410 --> 01:03:00.610

Stephanie Bogan: the fundamental question is

395

01:03:00.870 --> 01:03:05.670

Stephanie Bogan: right. When we are the business. It's hard to extricate ourselves from that.

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01:03:06.290 --> 01:03:10.180

Stephanie Bogan: It just did the whole point of Kpis

397

01:03:10.670 --> 01:03:16.770

Stephanie Bogan: at an individual level and a team level, because we've got the team version which we'll talk about in March, when we all get together.

398

01:03:16.880 --> 01:03:19.190

Stephanie Bogan: is to set a standard.

399

01:03:20.490 --> 01:03:21.649

Stephanie Bogan: Is that a standard?



400

01:03:21.690 --> 01:03:30.459

Stephanie Bogan: Now there's a lot to write to this conference like there's a lot of guilt that goes into setting standards. And who am I like? We will talk a lot about that this year.

401

01:03:30.470 --> 01:03:32.019

Stephanie Bogan: But step one is

402

01:03:32.140 --> 01:03:43.240

Stephanie Bogan: accountability. How do we to Ryan's point when we start to create other income engines or to deleg delegate responsibility to our teams?

403

01:03:43.370 --> 01:03:53.240

Stephanie Bogan: How do we start to measure that performance. And if we're really honest with ourselves, we're really bad at measuring performance beyond, like good job. Here's some money at the end of the year.

404

01:03:54.210 --> 01:04:09.919

Stephanie Bogan: How do we define performance? First step, Brian. Right? In order to say, like, Hey, our average advisor does between 5 and \$700,000 a year. They work between 100 and 120 clients. This is the core work we do like. Oh, okay, that makes perfect sense to me.

405

01:04:10.100 --> 01:04:24.360

Stephanie Bogan: But we have to be able to define that model at a business level. So as we go through this year, that level, one version of the Kpi worksheet is, what's your baseline business accountability.

406

01:04:25.120 --> 01:04:31.220

Stephanie Bogan: spaceline, right? Lauren, Chris like what's revenue per advisor? What's the goal in 3 to 5 years?

407

01:04:31.720 --> 01:04:40.969

Stephanie Bogan: And then that tells us what that roadmap for changes. Because, Ryan, right like you're in this great spot where you get to be in business, run role. And Ron goes. What's the next? Yet?

408

01:04:41.190 --> 01:04:59.290

Stephanie Bogan: Right? You're literally creating revenue for the next generation of income engines. So we have to build those income engines. We gotta train and develop those engines. And then we have to have a standard that we hold them to. That says, Hey, at this firm your bar is between right 500 a million. Here's how you get paid when you hit that bar.

409

01:04:59.500 --> 01:05:15.630

Stephanie Bogan: That's the model, and I'm I'm taking it like down the down the road, like kpis in general, are just a starting point for measuring your performance. If I'm an athlete and I'm running the 100 yard dash.



410

01:05:16.330 --> 01:05:17.940

Stephanie Bogan: I can track that.

411

01:05:18.480 --> 01:05:29.239

Stephanie Bogan: And they're like Steph. You did 2.1 7 s, and you gotta get to 2.1 5 s. And in order to do that you have to eat broccoli 7 days a week I'd be like alright.

412

01:05:29.780 --> 01:05:31.390

Stephanie Bogan: Obviously not my jam.

413

01:05:31.690 --> 01:05:47.419

Stephanie Bogan: But the point is like, now I have the roadmap for change. So that's where your kpis become really valuable, Ryan. Now we're looking at it, and we're saying no different than success shifter at a firm level. This is where we are. This is where we said we wanted to be.

414

01:05:47.570 --> 01:05:56.209

Stephanie Bogan: How are we meeting that standard? Right? So Melissa had to go back to 3 different divisions last year through our coaching and be like, hey.

415

01:05:56.420 --> 01:06:13.680

Stephanie Bogan: this division is not produced. Link firm, wide, right. She's carrying the weight. But each individual division, right office, slash advisor is underperforming. So every single person that she adds in her growth engine actually becomes deluded.

416

01:06:14.490 --> 01:06:37.210

Stephanie Bogan: Each engine has to perform at a certain level, and then you can add another engine. And that's the growth machine. Right? Can we? Funnel leads to each of those engines such as the firm can create that growth versus relying on individual rainmakers to create that growth. So one you've got individual advisor or firm performance.

417

01:06:37.260 --> 01:06:46.509

Stephanie Bogan: We're hiring a marketing director. Right? I'm doing the exact same thing with her right. Now, Mark, like, Hey, here's where we are. I don't need to pay you to grow the revenue I've got.

418

01:06:47.140 --> 01:06:59.079

Stephanie Bogan: I need to pay you to grow the revenue I don't have. So hey, here's your base. Here's your upside right, based on growth. And that's where Kpis become valuables. We're setting standards for the business

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01:06:59.230 --> 01:07:01.420

Stephanie Bogan: and performance and productivity.

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01:07:01.570 --> 01:07:28.180

Stephanie Bogan: Even light standards are a great place to start. And then, as you hit your your 2 or 3



like Brian, you guys can start doing that team modeling like Melissa. We like, build that team model for every team. And then you can see how each team, if your revenue is 2 million dollars divided by 3 advisors. You can right allocate that by clients or advisors, and start to see how each team is performing. And then, Ryan, our go. Our job for all of you is to get each

421

01:07:28.350 --> 01:07:30.500

Stephanie Bogan: team beyond you

422

01:07:31.210 --> 01:07:39.079

Stephanie Bogan: performing at an income engine level. That's the next level of growth and accountability. So hopefully, that helps a little bit. That was a lot.

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01:07:39.420 --> 01:07:40.680

Ryan Wyatt: Yeah, it does. Thanks.

424

01:07:42.230 --> 01:07:47.330

Stephanie Bogan: And you guys, we've talked a lot about the success shifter if you can't manage yourself.

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01:07:47.420 --> 01:07:50.889

Stephanie Bogan: I say this with all love, because I constantly work on it.

426

01:07:51.630 --> 01:08:17.220

Stephanie Bogan: Mark, if you can't manage yourself, you are the greatest income engine that you've got right if you waste 20% of your time. So that's where the success shifter comes in, or you. So I always like to joke. We were just interviewing for this marketing director role, and someone asked really great question, and they said, How would you like? How would you describe your company like if your company were personalities, who would you be? And I thought, Well, that's a really great question for marketing person.

427

01:08:17.520 --> 01:08:19.329

Stephanie Bogan: And I said,

428

01:08:20.840 --> 01:08:24.259

Stephanie Bogan: Navy seals and Oprah Winfrey have a baby.

429

01:08:25.350 --> 01:08:26.500

Stephanie Bogan: That's my company.

430

01:08:27.069 --> 01:08:38.240

Stephanie Bogan: The Navy seals are operational. Excellence, man. They're like we're gonna get in or take through. Crush it right? Like we are the best at what we do. We are efficient. We are effective.

431

01:08:38.470 --> 01:08:45.220



Stephanie Bogan: And then Oprah is like, and we love everybody like, oh, yeah, it's great. We love right? I was like, that's my company right there.

432

01:08:45.740 --> 01:08:48.360

Stephanie Bogan: Alright like, how do our habits support that?

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01:08:49.229 --> 01:08:58.600

Stephanie Bogan: And so that's where the success shifter if you want to amplify your personal performance and code, for that is Ryan. Yes, you do.

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01:08:59.170 --> 01:09:07.680

Stephanie Bogan: This is the say, like atomic habits. James Clear has got this like a version of this. I was like I should have wrote that book. That was a bazillion dollars they didn't make.

435

01:09:08.120 --> 01:09:12.909

Stephanie Bogan: It's just saying to yourself, Mark Kevin, hey, Chris?

436

01:09:13.330 --> 01:09:21.539

Stephanie Bogan: What are the habits and behaviors that are? Gonna have you operating at that next level, Ed? What are they? What is.

437

01:09:21.990 --> 01:09:31.629

Stephanie Bogan: what's Ed do? How does he produce? Wh? What? How fit is he like? What kind of relationships you're like? Oh, I love that. I love that 2. What's he look like?

438

01:09:31.950 --> 01:09:34.840

Stephanie Bogan: Right? That's what shows up on your success. Shifter.

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01:09:35.850 --> 01:09:39.190

Chase Crump: Beverly, can you explain the success shifter

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01:09:39.229 --> 01:09:42.029

Stephanie Bogan: like, what? How do you actually do it.

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01:09:42.170 --> 01:09:52.380

Stephanie Bogan: So this is the crazy, stupidest thing ever chase, because it's so ridiculously dumb. Literally, it's one through 31 columns.

442

01:09:52.430 --> 01:10:08.330

Stephanie Bogan: and then right, the rows are like what you want to do. I break mine into like health and fitness relationships, revenue growth branding. And then it's literally you can look at that little tiny version on the screen. There, if I can scroll it up, can I screen it up?

443



01:10:08.430 --> 01:10:09.610
Stephanie Bogan: Can you guys see that

444
01:10:10.160 --> 01:10:10.850
like

445
01:10:11.380 --> 01:10:13.369
Stephanie Bogan: you probably can't read that I can't read that.

446
01:10:15.310 --> 01:10:18.410
Natalie Bergsma: I think a big piece of it is the setting goals

447
01:10:18.470 --> 01:10:33.490
Natalie Bergsma: is really about your habits, and a success shifter is designed to help you track and measure the habits, and then you get to define what the categories that you want to track and measure are relative to your goals. Right

448
01:10:33.490 --> 01:10:50.849
Natalie Bergsma: personal health and wellness and self care. I always put on a success shifter, because if we're not taking care of ourselves first, right? The the train kind of crashes later on down the down the road. So right, what are the things that you wanna do? Consistently as an example.

449
01:10:50.850 --> 01:11:11.470
Natalie Bergsma: I wanna build a sustainable prospect. Pipeline great. I need to go on social media every day, because that's the marketing strategy that I picked alright on my success. Shifter is 30 min of LinkedIn every single day. That is literally on my success. Shifter. Right? I wanna grow my team. Okay. Well, I need to spend regular time mentoring and leading them. I'm gonna spend

450
01:11:11.560 --> 01:11:28.809
Natalie Bergsma: 3 HA week just mentoring and leading and training my team. I want to get into shape right? I'm going to do Yoga? 30 min for every day. Right? So it's really setting a framework of how you want to hold yourself accountable.

451
01:11:29.550 --> 01:11:44.839
Ihinton: Sorry to interrupt. So you're just as Chase was asking, are you just checking like this is March the Fourth, and you did everything you just mentioned. Are you just checking those.

452
01:11:45.010 --> 01:11:57.200
Stephanie Bogan: Yes. Yup. So you guys want to know what's on my 6. So I have a success shifter. I use it all the time. Now what I'm like riven. I'm all good. I don't need it. But every single time.

453
01:11:57.350 --> 01:12:01.600
Stephanie Bogan: every time, Jason, Laura, I want to create a new behavior. What do I do?

454

01:12:02.580 --> 01:12:08.130

Stephanie Bogan: I go to my success shifter. So, Chase. Laura, I want you to imagine, Ryan, Rob.

455

01:12:08.250 --> 01:12:10.789

Stephanie Bogan: you're the best version of you

456

01:12:10.970 --> 01:12:14.719

Stephanie Bogan: personally and professionally. You are just

457

01:12:14.840 --> 01:12:40.429

Stephanie Bogan: on fire. You're lighting up Chase. What is that version of you? That version of me gets up in the morning. She goes running with the dog. She meditates. She has a blueberry old mill, smoothie with person banana, I can tell you what the best version is. Stephanie looks like, and the days that I map that out and do it. Guess what I brush it and the days that I don't where I'm like. Oh, I'm just too busy to pay attention. Guess what happens.

458

01:12:40.670 --> 01:12:45.800

Stephanie Bogan: I was awesome that day. I really was, but at the end of the day I'm like, Oh, I was like.

459

01:12:45.970 --> 01:12:58.839

Stephanie Bogan: so chase this for you guys, Ryan, this is the what is the best version of me at that next level like this is not about the current level. This is the next level.

460

01:12:59.150 --> 01:13:10.049

Stephanie Bogan: So right now I'm working on intermittent fast love, intermittent, fast, super awesome. By the way, if anybody like right? So I'm like on my printed out. My success shifter. My husband, because it goes downstairs. He was like

461

01:13:10.220 --> 01:13:24.609

Stephanie Bogan: the printer. My office never works. Don't know why he's like what is. Oh, he knows what a second he's like. Oh, you're doing a success shifter. I was like, Yeah, let's do literally. Let's do one for everyone. My poor family, 13 and 6 year old

462

01:13:24.800 --> 01:13:43.679

Stephanie Bogan: success shifter. I did Spanish with Miss Cindy twice a week. I skied twice like they are learning like I'm gonna be primed into my habits that make me happy and healthy, and I'm gonna learn how to be accountable and accountable is, I am clear and transparent on what I said. I wanted to do, and I'm holding myself to a standard

463

01:13:44.080 --> 01:13:50.180

Stephanie Bogan: to a standard is where it breaks down. We all love. We're like, Oh, I'm going to be so awesome.

464

01:13:50.330 --> 01:13:53.519

Stephanie Bogan: and then it breaks down because no one's holding us accountable.



465

01:13:53.730 --> 01:14:13.749

Natalie Bergsma: Yeah, it does a couple of things to limitless. We do it a little bit different is it's paper. You print it out. You put it on your desk. Here's the reason why, because I said so isn't a good enough reason to do something. It's not a layer of accountability having it right in front of you, hey? It's right there I sit down. I see. It

466

01:14:14.000 --> 01:14:28.130

Natalie Bergsma: reminds me to check in and to do that creates that particular activating system. Oh, I gotta go do that thing. It's gonna be there ticking the boxes. Feels good, right. I really, really, you get your to do list. Check off the box like woo.

467

01:14:28.280 --> 01:14:50.349

Natalie Bergsma: I feel really good about that. It creates that dopamine hit that you have. And the paper version technically sticks better. There's a lot of science and research that says, Hey, when we write down our goals or do note taking with our hands as opposed to typing or using an app, apparently because we've just now learned how to use thumbs for typing it ingrains in our brain

468

01:14:50.390 --> 01:15:08.959

Stephanie Bogan: better. So that's the reason we have. You start with a success shifter. That's a paper format. It's there. It's easy to use. You can ignore it, and it re ingrains those things for 20 years. And my copy, I swear to you every time printed out every time I put it in the computer. And I put it on a tab

469

01:15:09.200 --> 01:15:15.550

Stephanie Bogan: I forget about it. Is it just a little tab when it's sitting there on the corner of my desk chase? I'm like,

470

01:15:16.100 --> 01:15:23.930

Stephanie Bogan: So this is where you can. Really, this is seemingly simple. Super raising the bar, Ryan.

471

01:15:25.020 --> 01:15:35.629

Stephanie Bogan: your goal isn't to get Ron to close 1 million dollar deals anymore hypothetically. your goal is to get other people to close 1 million dollar deals.

472

01:15:35.910 --> 01:15:53.660

Stephanie Bogan: So on. Your success shifter. One of the things I would be tracking from a rain. Making perspective isn't just right. Incoming right? Number of meetings, etc. It's right number of closes over a million that Ron wasn't involved in like. That's where we start to use it to evolve ourselves in the team. Step one is you

473

01:15:53.760 --> 01:15:57.429

Stephanie Bogan: chase what is the highest, happiest version of you?

474

01:15:57.770 --> 01:16:10.199

Stephanie Bogan: No one on this calls living that not even me. Trust me, I spend way more than you

guys spend on coaches. It always makes me like God, you guys are. I love it like it's real money. But I spend way more than that on coaches

475

01:16:10.450 --> 01:16:12.760

Stephanie Bogan: so that they can tell me I need to do this stuff.

476

01:16:12.770 --> 01:16:13.820

Steph, I already know.

477

01:16:16.000 --> 01:16:39.170

Stephanie Bogan: Is there a version, though? That's like, not paper. I have like 4 desks in 2 cities. So yes, obviously, electronic works. So the thing is, that's where, if you really need electronic version, you're gonna go with like an app habit or something else. Put this baby on your desktop, Chris. The odds are overwhelmingly forget about it

478

01:16:39.250 --> 01:16:54.489

Stephanie Bogan: right? Well, and I already go into like chronometer and track my nutrition. And I'm already like using the phone to track a lot of things. If you have a system where it can set up a system online, like, I have a habit tracker, because, quite honestly, I'm pretty proficient at habit tracking.

479

01:16:54.610 --> 01:16:58.959

Stephanie Bogan: but when I do something really new, what do I do every time?

480

01:16:59.990 --> 01:17:09.669

Stephanie Bogan: And I literally printed it out. I was like, Oh, I gotta get yoga in my morning. and I've been trying for a month and a half to get yoga in my morning.

481

01:17:10.190 --> 01:17:11.400

Stephanie Bogan: How's that going

482

01:17:11.650 --> 01:17:21.030

Stephanie Bogan: not so great. Why, cause it's a freaking wish, you know what's gonna make it happen? I'm gonna put it on my success shifter. And I'm gonna say to myself and the universe.

483

01:17:21.470 --> 01:17:34.729

Stephanie Bogan: I'm a better person when I do yoga twice a week. This is how I'm gonna write, create well-being for myself, and show up better for my universe and my client. And then it's gonna be 2 boxes that I'm gonna have to do it cause I hate.

484

01:17:35.280 --> 01:17:39.890

Stephanie Bogan: Second, I hate empty boxes. You all are the same. We hate empty boxes.

485

01:17:40.530 --> 01:18:06.059

Natalie Bergsma: options. There, too, is. Put it on your desktop. It is a tool on electronic format. You can



put it on your desktop. So it's right there, big and bold every day if you like, if you actually like apps and can use them so that they don't create additional distractions for you. That's why we're not big fans of them app like strides or streak like they're a bazillion goal setting and habit tracking apps. There's no shortage

486

01:18:06.150 --> 01:18:21.140

Stephanie Bogan: of them, so I print mine out, and I tape it on the mirror in the bathroom, and I got my magic marker. That's like, you know, energies everything it like literally. That's my morning in my evening, like, there it is. It's on my desk. It's on my mirror.

487

01:18:21.250 --> 01:18:26.480

Stephanie Bogan: Electronics is great if you pay attention to it.

488

01:18:26.830 --> 01:18:41.069

Stephanie Bogan: That's the only thing with electronic Kevin. Right? We put it in the computer. And then we just don't see it 6 times a day, and we don't pay attention to it. The whole reason it works is because you're looking at it. When you see that page sitting on the corner of your desk, Laura?

489

01:18:41.620 --> 01:18:44.730

Stephanie Bogan: Even if you haven't done it, what does your brain say?

490

01:18:46.520 --> 01:18:53.869

Stephanie Bogan: Your brain looks at that piece of paper, and it knows all it's like, I gotta do this. I got it like, it's like, all in. It's like, Oh, yeah.

491

01:18:54.430 --> 01:18:56.440

Stephanie Bogan: all you have to do is look at it.

492

01:18:56.850 --> 01:19:02.560

Stephanie Bogan: and your brain is pulling in all of that download and going. That's right. That's why I need to do this

493

01:19:02.630 --> 01:19:04.990

Stephanie Bogan: when it's in the computer. We miss it.

494

01:19:05.090 --> 01:19:20.769

Stephanie Bogan: So it's, I think, to Natalie's point, it's about the habit change. If for me, I have got to print it out if I put I like. I'm all about tech. But if I put this baby on a tab with my 6 other tabs, I just don't pay attention to it when I see it sitting on my desk. I'm like.

495

01:19:20.790 --> 01:19:23.289

Stephanie Bogan: I, literally you guys, I had to go back

496

01:19:23.780 --> 01:19:30.550

Stephanie Bogan: to the email accountability system. Because, as you know, I haven't had any Ea for. So what happens when you don't have an Ea.

497

01:19:30.700 --> 01:19:32.400

Stephanie Bogan: you check your own email.

498

01:19:32.860 --> 01:19:42.509

Stephanie Bogan: So I had to go back to my success shifter. I had to print it out, and I had to put on their email twice a day, because what am I in the habit of now.

499

01:19:43.780 --> 01:19:47.540

Stephanie Bogan: when I'm acting as my Ea, I gotta check it a little bit more.

500

01:19:47.930 --> 01:20:00.410

Stephanie Bogan: And now I'm like, Oh, wait! I have a great person. I don't have to do that. So I literally, you guys, I went back to the basics, was anyone on the lifestyle call with Josh where he talked about email, post it, one and email post at 2.

501

01:20:00.630 --> 01:20:15.479

Stephanie Bogan: That's accountability. I literally have a post it that says, email number one, I wrote on the post. It email number one. And I wrote on the other post, it email number 2, and they stick on my monitor. And when they check email the first time I take the first one down.

502

01:20:17.600 --> 01:20:22.860

Stephanie Bogan: Second time I take the second one down, and guess what I don't get to do after the post is down

503

01:20:24.510 --> 01:20:25.609

right now.

504

01:20:25.730 --> 01:20:32.099

Stephanie Bogan: So I gotta tell you, I look at that second one. And I'm like, Oh, I'm gonna check. Nope. No, if I check right now, I can't check again.

505

01:20:32.730 --> 01:20:40.390

Stephanie Bogan: Right? So it's even for me. We are always my God, you guys, you're gonna be here 50 years from now. You're gonna be working on your time.

506

01:20:40.740 --> 01:20:50.269

Stephanie Bogan: Michael and I. Car. I was just currently we're all as as cause. Our time is our energy and our attention. It's what we have to give to the world. It's funneling it.

507

01:20:50.500 --> 01:20:56.109

Stephanie Bogan: It becomes a really important part. And with all love we kind of suck it, bottling it.



508

01:20:56.120 --> 01:21:11.670

Stephanie Bogan: And as a result, the real people. I was just in this group like you should all be 10 x growing like. Seriously, you guys are all awesome like, you're awesome humans. You're awesome advisors. You're like, it's why you're here. We don't attract Lemos.

509

01:21:12.810 --> 01:21:22.950

Stephanie Bogan: You guys should all be 10 x growing. The question you've got to ask yourself is, how do I, Kevin, show up as the leader of a 10 x firm or a 5 x firm?

510

01:21:23.980 --> 01:21:35.199

Stephanie Bogan: And it's different than the way that you showed up before, and that's what the years about. But that's where success is. During the Kpi start to give you a backstop that says, personally, Kevin.

511

01:21:35.280 --> 01:21:42.359

Stephanie Bogan: here's what right 3 million dollar Kevin does. How are we performing? And then, hey, here's what 3 million dollar firm looks like.

512

01:21:42.370 --> 01:21:57.339

Stephanie Bogan: How are we performing? So the success shifter and the Kpis are all about 2 things, one radical personal accountability. Who is the best version of me for this business that I put on that model? Probably. Chris, what's that woman look like?

513

01:21:57.500 --> 01:22:02.730

Stephanie Bogan: Who is she? How does she go up? What does she do to make that 3 year vision true.

514

01:22:03.250 --> 01:22:16.549

Stephanie Bogan: And then 2, right? How do as we're gonna talk about all year? How do we build a business around that? But if you guys like Michael and I talk about this so much. If you can't elevate your leadership skills in your mindset to get there.

515

01:22:17.010 --> 01:22:22.949

Stephanie Bogan: it doesn't matter. You're gonna be blocking and tackling, and you're gonna be exhausted all of the way.

516

01:22:23.470 --> 01:22:28.399

Stephanie Bogan: So that's what I we really want you to get clear about this quarter vision

517

01:22:28.840 --> 01:22:30.369

Stephanie Bogan: mindset habits.

518

01:22:30.560 --> 01:22:36.750

Stephanie Bogan: Now, what we're really layering in is the accountability model. Kevin, how do you hold



yourself accountable

519

01:22:36.870 --> 01:22:54.380

Stephanie Bogan: when you're the boss? How do you hold? That's what leaders is about Kevin's. Gonna look at Laura and go. Nope didn't know it. Oh, not that doesn't feel good like, hey, Laura, how do you have like we're now? We're on this together, right? Like you all know that you can 3 x 5 x or 10 x, or you wouldn't be here.

520

01:22:55.010 --> 01:22:56.510

Stephanie Bogan: You wouldn't be here.

521

01:22:56.640 --> 01:23:05.450

Stephanie Bogan: You're here because, you know, that's possible. And you're trying to figure out, what does that next level look like? And this entire quarter is about one

522

01:23:05.720 --> 01:23:17.199

Stephanie Bogan: you have to get clear as a leader. 2. You have to get clear as a business, so that everything else we do together is really aligned with that model. And those decisions. If that makes sense.

523

01:23:18.760 --> 01:23:20.190

Stephanie Bogan: All right mornings.

524

01:23:20.300 --> 01:23:22.949

Stephanie Bogan: Liz, you want to talk about mornings, are you? On mornings?

525

01:23:23.600 --> 01:23:33.710

Natalie Bergsma: I'm here to learn baby.

526

01:23:33.720 --> 01:23:52.699

Natalie Bergsma: No, as we talk about the success shifter. One of the things that absolutely I recommend you put on it, and you start your day with intention. Right? Why do I need to fuel my fire every single morning? Right? Getting really clear about that. So

527

01:23:52.910 --> 01:24:13.829

Natalie Bergsma: this if you haven't read Miracle morning right? There's a whole process here, but my recommendation is to start with what works for you. So for me, as an example, I don't wake up at 4 or 5 am stuff, I know. Does I wake up with my kids? I do all my kid things. I take them to school, and then I have my what I call my hour.

528

01:24:13.870 --> 01:24:23.949

Natalie Bergsma: I do my meditation, I do my yoga, I do my journaling and exercises. I define my top priorities for the day, and then I start my work day.

529



01:24:23.980 --> 01:24:43.990

Natalie Bergsma: I don't start my workday until I do those things, and my team actually knows that I and we've literally on this morning's call. I was like, Hey, I just wanna let you know, for the next 90 days I'm doing a new routine and a new practice. And so if I'm late to our Ops meeting, it's because I've made the commitment to myself

530

01:24:44.060 --> 01:25:09.819

Natalie Bergsma: to take care of myself first. So if I'm gonna be late, I'll let you know. Are you okay? With that she was like, Oh, wow, like, yeah, that's kind of awesome. No big deal. Right? So I'm demonstrating accountability. Now, my goal is to do that and show up on time. But I have a whole thing around time. We can talk about later. But the point there is that is so critical to how I show up in the day when I don't do it.

531

01:25:10.030 --> 01:25:34.109

Natalie Bergsma: You don't wanna be around me. I didn't do it on Saturday morning, and my husband and I got in a fight Saturday afternoon, right? So really creating a system and structure to get you off on the right foot and keep that momentum going to create that energy. So I'm curious how many of you already have a morning routine in place, and how many of you who's resistant to morning morning routine.

532

01:25:35.830 --> 01:25:37.950

Stephanie Bogan: Kevin, what's your morning routine?

533

01:25:42.180 --> 01:26:02.919

kevin: It's actually very similar to Natalie, cause I get up with my kids which they get. They go to school pretty early. So we're up to like 5, 45 and elementary school kids, too. I don't know. I it's it's weird, but same thing. Go through there. I do

534

01:26:03.370 --> 01:26:10.110

kevin: Take them, get them ready to school, get it off to school, get back home, do

535

01:26:10.480 --> 01:26:17.420

kevin: do my Co. Some kind of cold shower, or I got a pool that I go into sunlight with some

536

01:26:17.490 --> 01:26:20.919

breathing exercises that I do, and and then

537

01:26:21.140 --> 01:26:32.019

kevin: usually well, not. Usually. The goal is to get a workout in there. That's that's next on the list. But honest engines.

538

01:26:32.160 --> 01:26:35.369

Stephanie Bogan: I know how this is for me, Liz. You probably know this like

539

01:26:35.390 --> 01:26:37.369



Stephanie Bogan: days that you do it.

540

01:26:37.580 --> 01:26:52.300

Stephanie Bogan: What? What's that like? And then days that you don't do it? Do you notice the difference? Like genuinely, do you notice? Oh, absolutely 100 by especially by like 100'clock. When you've just like

541

01:26:52.650 --> 01:26:58.280

kevin: slug through an hour, hour and a half, and just feel

542

01:26:58.340 --> 01:27:13.850

kevin: just totally different. So yeah, no, there's I'm a bit of a edgy guy, anyway, sometimes, so I don't do it, and I'm really. Then I'm really on edge. So it's for me. It's like

543

01:27:14.150 --> 01:27:19.089

kevin: my one of my sons was watching the old, like 2,008

544

01:27:19.200 --> 01:27:43.460

Stephanie Bogan: incredible whole movie and he's the whole first 15 min. He's doing his things to try to just control himself. I'm like, yeah, that's kind of what this is the story about me. I've got to do that every day to keep myself in line. But yeah, so there's definitely a difference with everyone this year, but I think you'll enjoy this. I did the disprove like 20 years ago, and the Consolidated said.

545

01:27:43.620 --> 01:27:45.359

Stephanie Bogan: you need to work out every day.

546

01:27:47.570 --> 01:27:54.769

Stephanie Bogan: You need to like, expand them as of amount of it. I'm like, Yeah, that makes perfect sense to me. The days that I expend that energy in the morning.

547

01:27:54.850 --> 01:28:08.649

Stephanie Bogan: Everyone really appreciates it. And the days that I don't everyone really appreciate it like you're like, oh, so that's what success shifter and morning. Mir. The date what I call the daily routine.

548

01:28:08.860 --> 01:28:19.739

Stephanie Bogan: I have a morning routine and an evening routine. That's a little bit harder. It's more of a commitment. But but I gotta tell you like when you end every day with 15 min of reading. And

549

01:28:20.510 --> 01:28:28.249

Stephanie Bogan: how'd I show up today? Did I hit my bar? Did I show right like? You want to talk about radical accountability

550

01:28:28.260 --> 01:28:41.560

Stephanie Bogan: and processing like? Oh, I handled it this way and like that's where journaling is so

powerful, whether it's morning or evening. So the thing that I would really really try to pass on. And I know Liz and I talk about this a lot.

551

01:28:41.940 --> 01:28:47.239

Stephanie Bogan: you have a personal performance routine that makes you your best

552

01:28:47.530 --> 01:28:49.419

Stephanie Bogan: makes you your best.

553

01:28:49.770 --> 01:29:08.259

Stephanie Bogan: You need to know what that routine is for me. It's getting up. It's movement, meals and meditation, like I've done a ton of research on this. But this is what it boils down to for all humans. It's movement, meals and meditation. What are you doing to like? Move your body right? Do all those things we need to be to be happy. Health, humans.

554

01:29:08.520 --> 01:29:18.069

Stephanie Bogan: right? Meditation, some form of mindfulness. Right? And so those are the things we really want to ask ourselves. And I know it seems basic.

555

01:29:18.480 --> 01:29:32.630

Stephanie Bogan: And I know you're like some part of your brain's like, I can't believe I'm paying 30 grand a year for her. No, you really are. I have a coach and pay a lot of money to. And you know we start with. We start with things like, Are you having morning routine? Are you doing this. I'm like, yeah.

556

01:29:33.070 --> 01:29:38.439

Stephanie Bogan: these are the things that top performers do consistently

557

01:29:39.010 --> 01:29:43.930

Stephanie Bogan: because they are accountable for their energy.

558

01:29:44.260 --> 01:29:45.350

Stephanie Bogan: Now, that

559

01:29:45.470 --> 01:29:48.499

Stephanie Bogan: is a massive concept that I just laid on you.

560

01:29:49.450 --> 01:29:54.129

Stephanie Bogan: you Ryan Chase, Kevin, Chris Leana!

561

01:29:54.650 --> 01:29:55.660

Stephanie Bogan: Laura.

562

01:29:55.920 --> 01:29:58.850



Stephanie Bogan: you're accountable for your energy.

563

01:29:58.880 --> 01:30:00.390

Stephanie Bogan: Where is it going?

564

01:30:00.530 --> 01:30:02.330

Stephanie Bogan: What are you doing with it?

565

01:30:02.370 --> 01:30:05.770

Stephanie Bogan: And what's the effect that you're getting back?

566

01:30:05.980 --> 01:30:12.029

Stephanie Bogan: And if it's not everything that you want it to be, then my whole heart hopes that you

567

01:30:12.360 --> 01:30:21.859

Stephanie Bogan: start a morning routine like. There is not an ounce of research that does not say that having a morning, you don't have to sit on the couch and boom with the universe. It's also very cool.

568

01:30:22.350 --> 01:30:40.789

Stephanie Bogan: Go for a walk, read something, journal, listen to something motivational. What all the research says is, ladies and gentlemen, how you start your day. Set your day. Do that shit on purpose, that's all we're saying. Do it on purpose.

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01:30:41.800 --> 01:30:43.920

Stephanie Bogan: Kevin. What's your morning routine?

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01:30:45.290 --> 01:30:50.930

kevin: I yeah, sure. So I get up every day at 4, 45.

571

01:30:51.280 --> 01:30:58.939

Stephanie Bogan: So he just got bombarded with that question.

572

01:30:59.140 --> 01:31:09.030

kevin: You know I'm I'm I feel like I get way more done in the morning when nobody's around. So I learned, this is a wholesale, that's my try to do more work, cause I

573

01:31:09.560 --> 01:31:15.189

kevin: more awake and and added, do market apply emails and perceptions. Reality.

574

01:31:15.740 --> 01:31:22.849

kevin: I believe. A lot of clients like, Wow, he's email me, 5 30 in the morning. Get back to me early and I'm down on my emails.



575

01:31:22.940 --> 01:31:29.410

kevin: Then answer, you know, check on my team when they get in. I try to be here most times before then.

576

01:31:29.720 --> 01:31:36.979

kevin: Just leadership that I used to have I used to work for. And then after that, I tried to go to the gym between

577

01:31:37.050 --> 01:31:42.519

kevin: 9, 30 and 1030, and come back. Do my meetings, and call so much. That's what I did.

578

01:31:43.030 --> 01:31:50.159

Stephanie Bogan: So what Kevin's got, what I want you all to have this quarter, and I don't care what it is. I'm not judging it.

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01:31:50.840 --> 01:31:59.380

Stephanie Bogan: but I want you to have something. That is what I call a happy high performance routine. I have yet to meet an entrepreneur that did not say

580

01:31:59.560 --> 01:32:03.499

Stephanie Bogan: in some form or fashion, I figured it out. This is what we all want

581

01:32:04.590 --> 01:32:06.190

show up every day. And I'm like.

582

01:32:06.250 --> 01:32:15.279

Stephanie Bogan: ask and take names and have impact and add value. And it's gonna amazing. And I wanna leave it a reasonable time. And I wanna love

583

01:32:15.730 --> 01:32:30.339

Stephanie Bogan: I don't know why, if I don't want to be thinking about that shit all the rest of the time like, can I just get an ad Amen. How are we on that like? It's I call it the edge. We want to just wash it, and then we want to let it go, and we don't know how to do that. It's very complicated.

584

01:32:31.190 --> 01:32:34.969

kevin: The nice thing here is I live. We just moved their office like

585

01:32:35.180 --> 01:32:38.700

Stephanie Bogan: half a block for my house, so I can get here whatever

586

01:32:38.770 --> 01:32:49.819

Stephanie Bogan: easy. Well, it's almost too easy for you. Yeah. My office is one flight up. That's way too easy. By the way, you're like up, down. That's the only next week I'm going up and down. That's my



exercise

587

01:32:49.950 --> 01:33:09.470

Stephanie Bogan: at some point.

588

01:33:10.120 --> 01:33:22.019

Stephanie Bogan: Chase. What is your happy. So I want you all to ask yourself this question. We did model practice. That's the business vision. Right? 3 years, one year. However, you quantify that

589

01:33:22.570 --> 01:33:26.809

Stephanie Bogan: what we're talking about this month is personal success.

590

01:33:27.000 --> 01:33:45.600

Stephanie Bogan: and I love health. Well, being. But like, how are you? Gonna use your time as you show up in this business. Ryan wants to focus right on rain making an energy like that should not be 90 other things. So, Ryan, if you were at the ideal firm at the ideal goal. What would you already be doing?

591

01:33:45.850 --> 01:34:06.530

Stephanie Bogan: And then your success shifter, is about laying into accountability for those habits, hey? I'd be producing 3 million dollars a year, which means I'd be producing \$215,000 a month, which means I'd be creating right 20 client leads at \$20,000 like, now I can reverse engineer. How am I gonna show up and do that?

592

01:34:07.510 --> 01:34:08.559

Stephanie Bogan: It's about

593

01:34:08.620 --> 01:34:12.580

Stephanie Bogan: personal accountability. If we can't do that.

594

01:34:13.030 --> 01:34:17.830

Stephanie Bogan: We can't elevate our firm to the next level. We can't model that for our team.

595

01:34:18.230 --> 01:34:29.060

Stephanie Bogan: So step one is, can we get really clear? Right? January. What do we want to create? February? How do we hold ourselves? Accountable? Right? Success shifter, etc.

596

01:34:29.900 --> 01:34:58.910

Stephanie Bogan: Step 3. March. How do I hold myself accountable as a leader, because if you wanted 2 x 3 x 5 x 10 x. And I swear to you it's all so possible way easier than you think. It's not about the massive marketing machine. We're gonna talk a lot about the marketing machine. It's about you have to. Mike will talk to you guys about this in May when he comes out. We talk about this a ton. He's 10 x twice in his portfolio of companies.

597

01:34:59.480 --> 01:35:05.469



Stephanie Bogan: he joked. I was like he's like you joke about tenxing me. But I actually tenx twice. I'm like, Well, why are you tell that story

598

01:35:06.600 --> 01:35:09.360

Stephanie Bogan: like 10 x twice is massive.

599

01:35:10.900 --> 01:35:14.300

Stephanie Bogan: and I'm not saying you have to 10 x Kevin or Chris.

600

01:35:14.500 --> 01:35:26.089

Stephanie Bogan: But I'm saying, if you did, what does that version look like? And so that's where your model practice and your success shift during your kpi all intersect. If the firm looked like this.

601

01:35:26.350 --> 01:35:31.200

Stephanie Bogan: my success shifter, would look like this, and my Kpi worksheet would look like this.

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01:35:31.880 --> 01:35:37.700

Stephanie Bogan: Now, how to reverse engineer, that to make it happen is the real work that we're all doing together this year.

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01:35:37.780 --> 01:35:38.809

Stephanie Bogan: Does that make sense?

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01:35:40.650 --> 01:35:51.109

Stephanie Bogan: I know you're excited. Alright, I think we're right up on time. I want to take a couple of minutes and just do a little bit of roundtable if you need to run. That's great, Liz, are you there?

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01:35:53.130 --> 01:35:57.370

Stephanie Bogan: I know I am. I know I do. That was a little chatty earlier. So.

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01:35:57.560 --> 01:36:08.949

Stephanie Bogan: Liz, can you walk us through a little bit I want everyone to kind of go through these slides, and then I want everyone to share just a little bit about how they're feeling about these questions. Can you lead us through that?

607

01:36:10.970 --> 01:36:22.900

Stephanie Bogan: Am I the participant, or am I the coach? You're the coach? I'm gonna kick it to Natalie, cause I'm participant on this call. Oh, that's right. That's cool.

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01:36:23.080 --> 01:36:32.919

Natalie Bergsma: Right? Well, I'm gonna I'm gonna yeah. Yeah. I'm gonna kick it back to you is in that we would love you to kind of share like

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01:36:32.930 --> 01:36:44.379

Stephanie Bogan: what is your biggest resistance around this month's assignment? What's standing in between? And how will you hold yourself? I love that Natalie Liz. How are you experiencing this?

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01:36:45.050 --> 01:36:55.529

Liz Hand, CFP®: Okay. So my biggest resistance right now is mostly like overuse with my phone. I just put in some parameters around it again. So

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01:36:55.910 --> 01:37:03.750

Liz Hand, CFP®: this being my fourth year in limitless like, set it up towards the beginning, and it slid, so need to reframe all of that.

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01:37:03.820 --> 01:37:12.529

Liz Hand, CFP®: The other piece is my morning routine has slid as well. So I, or going into surge. I wanna be

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01:37:13.150 --> 01:37:16.750

Liz Hand, CFP®: energized. And so yeah.

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01:37:16.930 --> 01:37:17.910

Liz Hand, CFP®: that answer it.

615

01:37:18.090 --> 01:37:23.130

Stephanie Bogan: Yeah, it's great. You pointed. Oh, sorry, Steph, go ahead.

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01:37:23.200 --> 01:37:28.230

Natalie Bergsma: I was. Gonna say, I think you pointed to something that's really critical. As you start this work, which is.

617

01:37:28.810 --> 01:37:48.179

Natalie Bergsma: you're going to do it. And then you're gonna get good at it. And then you're gonna fall off the wagon because you went to a conference, or you went on vacation. Part of what you got to practice as you do. This more and more consistently is how quickly you get back to the habit right? That recovery time should really shift and

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01:37:48.230 --> 01:37:57.530

Natalie Bergsma: and grow. So that might be something that you practice this is, hey? What's my, what's my recovery time to getting back onto a habit? Or what's the resistance that I have

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01:37:57.640 --> 01:38:01.319

Natalie Bergsma: to to have it or routine. That's kind of getting in my way.

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01:38:01.540 --> 01:38:06.669

Stephanie Bogan: Yeah, great point. So Liz shared kind of her resistance. Right? A Cabot.



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01:38:07.080 --> 01:38:11.930

Stephanie Bogan: Michael and I talk about like we've been doing this forever. We still are constantly

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01:38:12.010 --> 01:38:22.540

Stephanie Bogan: constantly managing our time. Chris like, where's going? How do I do it? How much so Chris is you think about what's standing between you and implement me implementing this month what comes up for you?

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01:38:24.280 --> 01:38:28.599

Chris Wedell: I'm in my own way with my time, like I know

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01:38:28.660 --> 01:38:33.230

Chris Wedell: I'm doing things I should not be doing even today. I was or

625

01:38:33.540 --> 01:38:39.779

Chris Wedell: I had 2 h yesterday. It was Sunday before my kids came back to me from their dads.

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01:38:40.250 --> 01:38:52.140

Chris Wedell: And I did a good job not working on the emails all weekend. But then it was 5 pm. On Sunday. And I was like, I'm just gonna knock this out right now, because everybody needs tax forms and just like.

627

01:38:52.440 --> 01:39:09.329

Stephanie Bogan: and I shouldn't be doing, I shouldn't even be sending the emails. In the first place, I should have been forwarding them to the team, and they should have done the damn tax forms. But I just fucking keep doing it, and it's pissing like, you guys will love this. I always share Michael stories because everyone loves Michael stories to be done. It's okay.

628

01:39:09.480 --> 01:39:11.230

Stephanie Bogan: Michael was like, Oh.

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01:39:11.670 --> 01:39:12.850

I figured it out.

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01:39:13.610 --> 01:39:18.859

Stephanie Bogan: I'm future. Me is thanking me. He calls it future means like a whole name for it. He's like Chris

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01:39:19.000 --> 01:39:22.989

Stephanie Bogan: on Sunday night future. You, said Chris.

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01:39:23.090 --> 01:39:29.820



Stephanie Bogan: You could do it now, and you could save us 2 h on Monday. It's gonna be amazing. And you were like, yeah

633

01:39:30.020 --> 01:39:42.159

Stephanie Bogan: future you. I'll totally do it, and then future, you never stop. So you're always on, because you're always saving future you like. We have to get to this point, ladies and gentlemen. Well, we can say

634

01:39:42.890 --> 01:39:48.879

Stephanie Bogan: it's done for now. And it's okay. The the engine. So that's the issue.

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01:39:49.240 --> 01:40:00.470

Stephanie Bogan: The engine is working outside of you, and until you have confidence in that, you feel like you have to be right. The one pumping the energy into the engine and you do

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01:40:01.390 --> 01:40:16.770

Stephanie Bogan: that's the goal is to switch. So your number one job as leaders isn't to be the income engine anymore. Your number one job as leaders is to learn how to invest in yourself and your business and teach

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01:40:17.040 --> 01:40:39.130

Stephanie Bogan: how to create income engines in the business. It's a radical shift, Chris, from like I get up and I produce to. Oh, I get up, and I gotta build a business that can produce without me, and then continue again, like whether you want to grow out of 5,000 other people or not. Is not the point right, like at the end of the day, to have a life you have to not have everything in the business be dependent on you.

638

01:40:39.610 --> 01:40:49.560

Stephanie Bogan: Let's put a great chat in. I have a picture on my phone to remind me to take 20 s before I open my phone and do whatever I decided to pick it up. For

639

01:40:49.630 --> 01:40:51.649

Stephanie Bogan: what is it? A picture of Liz

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01:40:54.080 --> 01:40:56.180

Liz Hand, CFP®: the Sanskrit word to breathe.

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01:40:56.190 --> 01:41:00.479

Stephanie Bogan: So I'm just taking a deep breath. So I'm consciously using my phone instead of

642

01:41:00.560 --> 01:41:13.980

Stephanie Bogan: Oh, Google, this thing. Or Oh, I need to say this thing to whomever whatever I decided to like this is so basic like, please don't feel like it's beyond you. I have alarm. I have manifestation alarms on my phone.



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01:41:14.030 --> 01:41:19.659

Stephanie Bogan: literally like, just goes off through the day. I'm like, Oh, supposed to breathe and manifest. Okay, that's what I'm supposed to do right now.

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01:41:20.400 --> 01:41:30.070

Stephanie Bogan: like it's okay to set an alarm that says time to check your email. If the alarm doesn't go off to do it, it's time to send an alarm literally to breathe. Liz will tell you like.

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01:41:30.660 --> 01:41:35.960

Stephanie Bogan: have you guys not set him up breathing alarm like 6 times a day? You should just stop and go

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01:41:38.570 --> 01:41:39.580

doing today

647

01:41:40.560 --> 01:41:43.730

Stephanie Bogan: your whole day will change, Jase, if you just go.

648

01:41:53.380 --> 01:42:03.299

Chase Crump: I just I just started. But have you all read it? Somebody read it books. I'll keep you a post along the way.

649

01:42:04.200 --> 01:42:22.830

Chase Crump: but I love it captivated me early. It basically gave them an explanation of like how we developed our nasal cavities and whatnot and sinuses from being cavemen to now and then. Why, there's so many problems with breathing, but it alluded to just how important, of course, the breath is, y'all talk about it a lot. So I thought about y'all

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01:42:23.140 --> 01:42:27.290

Chase Crump: for the reason I wanted to read it. But I'm I'm now. I'm eager for.

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01:42:27.320 --> 01:42:51.019

Stephanie Bogan: Give me all the good stuff of what it's doing for me. Why, it's important to certified well, getting trauma certified in breath therapy. And I do highly recommend that book because it really taps into how we stop breathing.

652

01:42:51.090 --> 01:43:01.909

Stephanie Bogan: Culturally, really interesting. So interestingly, I don't know if this is in the book, Alice, and this is my, take on it from the research that I've done like. We all stand upright until about age 5

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01:43:02.990 --> 01:43:04.379

Stephanie Bogan: happens. At age 5

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01:43:04.910 --> 01:43:12.740

Stephanie Bogan: we go to school. And what do we do at school? We sit, and what happens when we sit? We go like this

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01:43:13.420 --> 01:43:23.289

Stephanie Bogan: and our shoulders and our diaphragm crunches up, and we literally on. So if you watch a baby on a table breath

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01:43:23.470 --> 01:43:26.690

Stephanie Bogan: its belly. we'll go up and down.

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01:43:27.480 --> 01:43:33.919

Stephanie Bogan: not its lungs, its belly. So when we talk about the belly breath right deep when we really deep.

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01:43:34.040 --> 01:43:42.739

Stephanie Bogan: oxygenated breath happens deep in the lungs, the bottom third of the lungs. But we're all hyperventilating most of the time.

659

01:43:43.290 --> 01:43:47.450

Stephanie Bogan: and we do really quick, shallow breaths. It's just right when we sit down in school, and we do

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01:43:47.540 --> 01:43:59.170

Stephanie Bogan: oh, and we get stressed as we do, and when you Deep breath, Harvard, mind, Body Institute, Mark Harvard, create a whole institute around Harvard, mind, body. Do you know what Harvard Harvard decided

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01:43:59.290 --> 01:44:03.799

Stephanie Bogan: through all their research. Do you know what the number? One thing that connects mind and body is.

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01:44:05.170 --> 01:44:05.930

Stephanie Bogan: Elizabeth

663

01:44:06.680 --> 01:44:07.580

Allison Foulk: Rest?

664

01:44:08.560 --> 01:44:15.800

Stephanie Bogan: You're like your body is like, and you're all jazz. Dean is like going, and you're like, and you just stop and breathe.

665

01:44:16.610 --> 01:44:25.979

Stephanie Bogan: You literally center and calm your your your asympathetic nervous system. Right?



That's why we talk about those things so much when you

666

01:44:26.520 --> 01:44:27.730

Stephanie Bogan: breathe

667

01:44:28.680 --> 01:44:31.400

Stephanie Bogan: when you breathe into it.

668

01:44:31.760 --> 01:44:37.830

Stephanie Bogan: The interesting thing is, my personal experience is when you breathe into the question.

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01:44:38.210 --> 01:44:39.879

Stephanie Bogan: The answer's always there.

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01:44:40.570 --> 01:44:42.989

Stephanie Bogan: We just have to learn to breathe

671

01:44:45.230 --> 01:44:46.520

in the question

672

01:44:47.220 --> 01:44:54.620

Stephanie Bogan: which asks the next great question, hey, Chris, what's standing between you and implementing that great idea, Chase.

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01:44:54.760 --> 01:45:07.890

Stephanie Bogan: when you think about right having a daily routine or morning meditation, or a great walk that elevates you. What's standing between you and it? And what are we gonna do to hold ourselves accountable

674

01:45:08.230 --> 01:45:10.620

Stephanie Bogan: is really the conversation this month.

675

01:45:12.100 --> 01:45:16.269

Stephanie Bogan: How do we hold ourselves accountable

676

01:45:16.320 --> 01:45:20.769

Stephanie Bogan: to a higher personal bar. It's the

677

01:45:20.920 --> 01:45:23.820

Stephanie Bogan: hardest thing that we do.

678



01:45:23.860 --> 01:45:26.420

Stephanie Bogan: because Chase, there's no one out there.

679

01:45:26.470 --> 01:45:32.750

Stephanie Bogan: you know, outside of Danny is right pushing you right. You got you guys, you gotta find it on your own.

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01:45:32.800 --> 01:45:37.309

Stephanie Bogan: you know, and then you gotta try and communicate it to your team. And that's super frustrating and

681

01:45:37.340 --> 01:45:43.709

Stephanie Bogan: right. We want them to get in the car and hold the wheel and push the gas, and the way that we do that is revision and execution

682

01:45:44.460 --> 01:45:49.340

Stephanie Bogan: genuinely so when we can sit in the space, says, What's the goal?

683

01:45:49.960 --> 01:45:52.310

Stephanie Bogan: As an organization?

684

01:45:52.480 --> 01:46:12.099

Stephanie Bogan: What's our biggest resistance? Point? God, that's a powerful conversation to have with your team jays like, sit them down and be like, hey? So we're trying to do what are the biggest resistance points that we have. What's standing between us and this? What's it gonna take to make it possible to do searches to do service models to do 3 act like, what's it gonna take guys

685

01:46:12.230 --> 01:46:18.090

Stephanie Bogan: that becomes the conversation that we ultimately want to have with our teams. But we cannot

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01:46:18.420 --> 01:46:23.909

Stephanie Bogan: genuinely, truly, authentically, ask them to elevate themselves

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01:46:24.170 --> 01:46:30.089

Stephanie Bogan: until we can demonstrate to them that we can elevate ourselves

688

01:46:30.280 --> 01:46:36.869

Stephanie Bogan: with that level of clarity, transparency, and accountability that we are always talking about.

689

01:46:37.780 --> 01:46:39.429

Stephanie Bogan: That's our goal, this quarter.



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01:46:39.540 --> 01:46:48.930

Stephanie Bogan: Reg. You clear in the vision, build that positive mindset and habits, and then this month the last rate of that first quarter of setting yourself up for success is.

691

01:46:48.980 --> 01:47:10.520

Stephanie Bogan: can you create accountability for yourself and your team? We're gonna talk a lot more about that around teams this year. But for you, it's can you? As a leader, Kevin? Can you say? Hey, you know what 2 X means? I'm doing this, Laura. Hey? You know what? 3 x and my happiest high performing version of this business look like. That's what I'm always doing. What's my

692

01:47:10.520 --> 01:47:32.260

Stephanie Bogan: best version of me in this business that I'm like. I'm not doing this. And I'm not doing this. And I'm not basically doing 3 things, speaking strategy and solutions. That's my entire business model. That's all I want to do I want to speak to people cause I love it. Writing blogs speaking. I don't care. Strategy. I love strategy like. Give me a problem. I'll solve it solutions like, yes, let's fix it.

693

01:47:32.760 --> 01:47:39.569

Stephanie Bogan: But I'm also like the third level of fix we got Allison. We got Natalie. We got Adam, like

694

01:47:39.800 --> 01:47:48.079

Stephanie Bogan: like Fix happens like up here after everybody's been through everybody else. And I got amazing people. So like most people don't even need to get to me.

695

01:47:48.310 --> 01:47:50.560

Stephanie Bogan: That's what you're trying to create in your organization.

696

01:47:51.720 --> 01:47:56.449

Stephanie Bogan: It all starts with your version of you.

697

01:47:56.700 --> 01:47:57.370

Stephanie Bogan: Ted.

698

01:47:57.550 --> 01:48:07.110

Stephanie Bogan: Laura Kevin Chase, when you say, Hey, in 3 years this leaders thing, man, I am showing up every day. I'm on fire.

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01:48:07.160 --> 01:48:11.940

Stephanie Bogan: I am excited, I am energized, I am empowered. I am doing

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01:48:11.970 --> 01:48:17.460

Stephanie Bogan: shit that I love. This business is crushing like I feel amazing.

701



01:48:17.880 --> 01:48:38.840

Stephanie Bogan: What does that look like? And until you define that for your brain and you set the standard life will do it for you. But the second that you set that standard, ladies and gentlemen, and you say, this is how I'm gonna show up. This is how I'm gonna start my day. This is how I'm gonna set my day. This is the bar that I'm gonna hold myself and my team accountable to.

702

01:48:39.920 --> 01:48:42.870

Stephanie Bogan: Then what's that quote

703

01:48:42.900 --> 01:48:50.960

Stephanie Bogan: rising tide. Natalie was like rising tide. 60'clock. I don't know. Some bad quote. Yes, rising tide raises all ships.

704

01:48:51.890 --> 01:48:57.770

Stephanie Bogan: You are clear and accountable. It's a lot to ask your teams to be clear and accountable.

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01:48:58.690 --> 01:49:15.460

Chase Crump: I got a question on the vision like because I'm doing like the one page business plans and stuff it's easy to. I could just give you like another like, in 3 years we have 500 management. I could say 600 or 7 50, and just. I could easily just plug those in.

706

01:49:15.940 --> 01:49:33.330

Chase Crump: But at the same time you mentioned in in the beginning to sell overwhelmingly. The demographics are in our favor in the business. So, as I'm thinking about the 3 year vision is the first time, and and you've just made me think, or team processes like forced me to try to really think about what you're talking about like, what do I want?

707

01:49:33.580 --> 01:49:35.130

Chase Crump: So how do you balance?

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01:49:35.580 --> 01:49:43.080

Chase Crump: And it's though our industry is changing so quickly. There's so many options like you can build like we call Bill

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01:49:43.220 --> 01:49:46.949

Chase Crump: the same financial financial services business a different way.

710

01:49:47.390 --> 01:49:51.739

Chase Crump: like like, how do I keep my options on the table?

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01:49:52.140 --> 01:49:53.750

Chase Crump: I guess I mean, how's

712



01:49:54.280 --> 01:49:59.750

Chase Crump: what's the question like, it's like, I don't wanna keep some great stuff off of this canvas

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01:50:00.180 --> 01:50:04.699

Chase Crump: by bein too narrow. so like, how do you balance?

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01:50:05.040 --> 01:50:17.269

Chase Crump: Being very precise with the business without like keeping yourself from a lot of great opportunities that like I might not even know about right now. But I would. If you asked me 5 years I would have said yes, I would have wanted that in my business.

715

01:50:18.120 --> 01:50:25.750

Stephanie Bogan: You're gonna really. We're gonna talk about this a lot, march. But so you're this will be your your short answer till then, which you won't love. But you'll appreciate it later.

716

01:50:26.440 --> 01:50:28.410

Stephanie Bogan: That's not your goal.

717

01:50:29.280 --> 01:50:32.509

Stephanie Bogan: You need like a few things that you're just gonna crush

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01:50:32.640 --> 01:50:40.649

Stephanie Bogan: like a few things that you're gonna crush. So success at the next level for you and Danny and for everyone isn't about saying yes.

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01:50:41.790 --> 01:50:43.069

It's about saying no.

720

01:50:43.360 --> 01:50:56.699

Stephanie Bogan: it's about getting really clear. If we're gonna 2 x, if we're gonna 3 x if we're 5 x that is not a mish-mashy ambiguous like I don't know like that is precision at its finest like, how are we gonna do that?

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01:50:56.740 --> 01:51:03.150

Stephanie Bogan: Who are the clients? What's the growth plan? What are the channels? How do we build a plan that crushes like? That's how you get there.

722

01:51:03.650 --> 01:51:09.050

Stephanie Bogan: So Step one is, I love Chase's question. Because what you guys, what do you hear in that?

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01:51:09.330 --> 01:51:10.590

Stephanie Bogan: It's the right way.



724

01:51:11.660 --> 01:51:19.170

Stephanie Bogan: There is no one right way. I've got clients who built bill 1 billion dollar firms doing every single way and everything in between.

725

01:51:19.710 --> 01:51:27.729

Stephanie Bogan: That's where your conviction around the we could have a debate from now until the end of time around fee models and pricing

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01:51:28.140 --> 01:51:31.850

Stephanie Bogan: could have that debate as people do online all day long. It doesn't.

727

01:51:33.710 --> 01:51:37.769

Stephanie Bogan: doesn't matter what matters is. You pick one and you care about it.

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01:51:37.780 --> 01:51:40.800

Stephanie Bogan: He built a business around it. That's the shit that works.

729

01:51:40.810 --> 01:51:51.430

Stephanie Bogan: That's what matters. It's not whether a or like I guys, I have consulted with every kind of firm in the business. And you know what works picking, picking works. That's what works

730

01:51:51.710 --> 01:52:05.949

Stephanie Bogan: picking, you know, what doesn't work picking. I'm gonna be a volume model. And I want to provide boutique service that no, you can't do that. You can't be a boutique and provide volume service, you you can't. That's the where we break down. It's not the business model

731

01:52:06.370 --> 01:52:14.789

Stephanie Bogan: chase is that we don't pick the business model, and then utterly, ruthlessly, fiercely align

732

01:52:14.820 --> 01:52:19.009

Stephanie Bogan: everything we do with the business model. If we do that.

733

01:52:19.200 --> 01:52:35.350

Stephanie Bogan: it can only work. So everything else is a crisis of compromise, right? That we and look, I've made them. You've made them. But if we sat down and looked at someone's business as a Harvard case study, I could look at Mark's business, go back 10 years and be like well, mark. If you had just done this it would have been perfect.

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01:52:36.000 --> 01:52:37.750

Stephanie Bogan: Yeah, we all know that

735

01:52:38.440 --> 01:52:47.710



Stephanie Bogan: what I'm trying to do is help you guys get so clear and so confident on the value that you actually add that you stop screwing around with all the other stuff. That's what it's really about.

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01:52:48.500 --> 01:52:54.059

Stephanie Bogan: So Chase, what's the? It's a choice. What's the value that you guys as a firm

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01:52:54.490 --> 01:53:03.239

Stephanie Bogan: like you on that? With clients, it's your differentiate like our whole thing. You can you guys, there's a million consulting firms out there a million.

738

01:53:03.600 --> 01:53:08.580

Stephanie Bogan: Our entire business is build a wildly successful business in a life.

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01:53:09.510 --> 01:53:17.249

Stephanie Bogan: The life piece is the differentiator. Otherwise there'd be a lot of people calling me, and I don't want those people to call me, because I don't want to build their businesses. They're no fun.

740

01:53:17.440 --> 01:53:20.449

Stephanie Bogan: Just want to make a bunch of money and be greedy. Grubbers grow, go you?

741

01:53:20.970 --> 01:53:30.110

Stephanie Bogan: That's not what you're here like. That's the piece. When you get so clear chase on who your audience is. You don't have to market. You're just scaling.

742

01:53:30.230 --> 01:53:35.999

Stephanie Bogan: We're not apologizing. We're not hesitating. And that's the space we want you guys to really get to sit in.

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01:53:36.340 --> 01:53:43.330

Stephanie Bogan: And this is the weird thing it starts with you. Like, if you are really clear, add on how you shy. And you know.

744

01:53:43.370 --> 01:53:53.440

Stephanie Bogan: Brian, you've such an advantage. You know what the next level I mean. In in a sense you don't know right. But you like, you get to literally define that next level and say, this is what

745

01:53:53.760 --> 01:54:01.250

Stephanie Bogan: a 5 million dollar firm looks like. And this is my role in it. Let's make that happen. Like most people don't get that luxury.

746

01:54:01.640 --> 01:54:12.530

Stephanie Bogan: So that's where accountability is the honest engines, conversation that we are utterly responsible for the reality that we create for ourselves our work, our wealth, and our wellbeing.



747

01:54:12.560 --> 01:54:21.910

Stephanie Bogan: We don't have the work that we want. If we don't have the wealth that we want, and we don't have the well being that we want. Then we we need to make different choices.

748

01:54:22.510 --> 01:54:27.730

Stephanie Bogan: So this whole quarter is around setting up your map. What's the goal? I want to move to?

749

01:54:28.190 --> 01:54:29.270

Stephanie Bogan: 2,

750

01:54:29.640 --> 01:54:35.509

Stephanie Bogan: right? What are the habits and behaviors that are going to get me there, creating awareness and attitude around it.

751

01:54:35.540 --> 01:54:43.840

Stephanie Bogan: and 3 then taking action. How do we set standards to that goals and behavior? Notice that? Notice how that naturally kicks in

752

01:54:44.030 --> 01:54:58.409

Stephanie Bogan: Jase. Now we've got a vision. We've got behaviors now we've got goal. I know it's almost like I did that to on purpose. We have goals at the end of the quarter to go. Oh, how do we know if the behavior supporting the vision?

753

01:54:58.570 --> 01:55:05.680

Stephanie Bogan: That's right, we look at our Kpis and we're like, Wow! We took on 27 new clients this quarter. But our average client revenue went

754

01:55:05.700 --> 01:55:06.800

down.

755

01:55:08.390 --> 01:55:10.839

Stephanie Bogan: That was not the goal. So feels good.

756

01:55:10.850 --> 01:55:13.800

Stephanie Bogan: But it's actually so. That's where we have to have

757

01:55:13.850 --> 01:55:21.149

Stephanie Bogan: a radically honest feedback loop in our business, because, with all the love in my heart, we are awesome at lying to ourselves.

758

01:55:21.220 --> 01:55:29.209

Stephanie Bogan: it's great. And and by the way, we're making money, it's all great. But when we look at



how we're making money.

759

01:55:29.320 --> 01:55:42.940

Stephanie Bogan: the value that we add the effect like, Wow, there's just a massive amount of opportunity. So hopefully, that helps a little bit. So this this call was really about. hey, you've got a vision. You're all pretty clear on that. At this point

760

01:55:43.150 --> 01:55:44.240

Stephanie Bogan: 2

761

01:55:45.030 --> 01:55:58.819

Stephanie Bogan: you've got behaviors. You're aware of mindset. Now we're talking about skills, habits, and behaviors that you and your team are going to show up with right? And this month now we're bringing in that accountability piece like, oh, you said you wanted that chase.

762

01:55:59.060 --> 01:56:00.409

Stephanie Bogan: Show me. You want it

763

01:56:00.720 --> 01:56:14.410

Stephanie Bogan: right. Show me your budget. Show your team, your budget. Hey, team! Right? These are the kpis. We need to hit to hit that next level. And again for right, Ryan Ron, you guys can go right deep into that. We got like crazy spreadsheets. You guys don't want to start the crazy spreadsheets.

764

01:56:15.380 --> 01:56:19.890

Stephanie Bogan: What we want to start with is standards for ourselves.

765

01:56:20.430 --> 01:56:23.139

Stephanie Bogan: for ourselves, we we honestly suck at that.

766

01:56:23.190 --> 01:56:30.670

Stephanie Bogan: I like, I have to. You guys. However much you think you spend on coaches I spent like 3 excellent coaches.

767

01:56:31.660 --> 01:56:41.540

Stephanie Bogan: I have someone there. I have 2 coaches right now, literally 2 coaches twice a week, 2 h. I'm about to go to 4 h because I'm doing this whole cool manifestation thing. It's gonna be really fun.

768

01:56:42.100 --> 01:56:49.850

Stephanie Bogan: That's like, literally, I work 30 HA week. And I'm investing 4 h in coaches. What's that? As a percentage

769

01:56:52.070 --> 01:56:53.110

Stephanie Bogan: math people.



770

01:56:53.530 --> 01:56:59.340

Chase Crump: 8%, 10%,

771

01:56:59.370 --> 01:57:03.659

Stephanie Bogan: 15%. 15% of my time

772

01:57:03.880 --> 01:57:06.720

Stephanie Bogan: is invested in being better at what I do.

773

01:57:08.340 --> 01:57:16.179

Stephanie Bogan: That's a lot of time. But I'm very clear like, oh, right last year was tough here like Whoa, what? No. What did I notice about last year? Didn't do that?

774

01:57:16.510 --> 01:57:18.529

Stephanie Bogan: Okay, gotta get back to that

775

01:57:19.490 --> 01:57:31.720

Stephanie Bogan: like this is a radically honest conversation about radical responsibility. Ryan has every opportunity to build a incredible firm like, Great. How's Ryan gonna step into that chase, mark.

776

01:57:31.870 --> 01:57:38.500

Stephanie Bogan: Ed, how are you? Gonna step into that opportunity, because you, as humans, determine whether it happens or not.

777

01:57:39.170 --> 01:57:47.370

Stephanie Bogan: So you, operating at that happy, high performing zone right being above the line, being empowered and confident like. That's where all the magic happens.

778

01:57:47.600 --> 01:57:49.389

Stephanie Bogan: That's what this month is about.

779

01:57:49.890 --> 01:58:16.020

Stephanie Bogan: That's why the success shifter. The daily Pr like. What do you do to take agency over yourself, your state and your performance. If you were an Olympic athlete chase, you'd be at the gym every day at 5 Am. And there would be a coach writing your ass right? I'm here once or twice a week, like right? That's the level that you're really trying to get to what we want to do this quarters. Make sure you guys are all clear on why you're doing it.

780

01:58:16.870 --> 01:58:19.080

Stephanie Bogan: how you're going to be accountable.

781

01:58:19.230 --> 01:58:40.300

Stephanie Bogan: and then what actions? Because this becomes the habit loop. Right then, if we know



that where we got a vision and we know we're accountable, and we know we have to do that. Then it's all just about how. What do we have to do for ourselves and our teams to get done what I gotta do gotta pull, switch. Gotta fix my website, get built service model. I gotta hire like it's all just mechanics from that point. And mechanics sucks sometimes. Let's be honest.

782

01:58:40.770 --> 01:58:48.970

Stephanie Bogan: But it's all just mechanics at that point, guys it. Your ability to x 3 x 4 x is not about people process or platforms.

783

01:58:50.670 --> 01:59:00.540

Stephanie Bogan: It's about your ability to sit in the space as leaders and leverage learn to leverage people processing platforms, and then your growth is unlimited

784

01:59:00.860 --> 01:59:21.950

Stephanie Bogan: so hopefully that helps everybody just really settle into why we are dealing with great business and personal accountability. This quarter chase Ryan at like. What's that look like? What does your next level of view look like? And is that showing up in your daily routine, in your success shift, or whatever I don't care what your personal accountability model is.

785

01:59:22.100 --> 01:59:23.420

Stephanie Bogan: I care that you have one

786

01:59:25.060 --> 01:59:26.099

Stephanie Bogan: that make sense.

787

01:59:27.030 --> 01:59:28.100

Chase Crump: It's just

788

01:59:28.260 --> 01:59:33.269

Stephanie Bogan: let me know Barry over. And, you guys, I'm happy to hang out. But just so, you know, you're welcome to leave if you need.

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01:59:34.130 --> 01:59:39.969

Stephanie Bogan: But I took guys advice. So when I got anything today other than this, so

790

01:59:40.020 --> 01:59:44.830

Chase Crump: the success shift, there's like the okay? So like a workout today, check.

791

01:59:45.250 --> 01:59:49.000

Stephanie Bogan: what are you doing? What's next level you doing

792

01:59:49.010 --> 01:59:50.440

Stephanie Bogan: like if you're at



793

01:59:50.660 --> 01:59:53.320

Mark Wade: 3 x, what are you doing every day?

794

01:59:53.820 --> 01:59:57.050

Stephanie Bogan: So everyone go through this like, what's Chase doing in his 3 X model?

795

01:59:57.900 --> 02:00:02.189

Chase Crump: I don't know. It's really the first time that I've kind of thought about that, or thought about like

796

02:00:02.240 --> 02:00:05.630

Chase Crump: a better version of myself than currently.

797

02:00:05.850 --> 02:00:10.920

Stephanie Bogan: And that's why you don't have it yet, because you haven't envisioned it yet. So the second

798

02:00:11.140 --> 02:00:16.419

Stephanie Bogan: that you go. So you guys have heard the story a million times, I'm sure.

799

02:00:16.740 --> 02:00:21.049

Stephanie Bogan: Right, Michael, like 4 years ago. Ed Derek.

800

02:00:21.060 --> 02:00:25.860

Stephanie Bogan: right there, Derek Thorpe, right? The head of I used to Podcast, on this. I'm glad to share it.

801

02:00:26.390 --> 02:00:28.379

Stephanie Bogan: He calls me up, and he's like, Oh, my God.

802

02:00:29.460 --> 02:00:34.510

Stephanie Bogan: Derek, his right hand. Right? The editor. It's Derek, Rachel and Michael. That's it.

803

02:00:35.400 --> 02:00:38.479

Stephanie Bogan: Finally delegated to this one guy. And then the guy quits.

804

02:00:44.070 --> 02:00:44.840

Who's gonna

805

02:00:46.240 --> 02:00:52.069

Stephanie Bogan: no one wants to do this job. And I was like, Thank lots of people. And I did this job. And this was literally what I said to him.



806

02:00:53.220 --> 02:01:00.340

Stephanie Bogan: If you assumed this was the best thing that happened. If this was, in fact, the thing that led you to growth 3 x.

807

02:01:02.030 --> 02:01:15.999

Stephanie Bogan: What would the outcome be? And he literally came back to me 2 weeks later, with like a massive work chart which he is set straight blown out of the water. I'll just interrupt. Just see, you guys, I have something.

808

02:01:16.030 --> 02:01:18.770

Stephanie Bogan: It's the clarification piece.

809

02:01:19.940 --> 02:01:26.529

Stephanie Bogan: So Chase, that's the invitation for you, right, Ed, for you like right now the invitation is for you and Danny?

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02:01:26.890 --> 02:01:40.600

Stephanie Bogan: Wh. What is 3 extra 5 x or tenx. Look like? And then where you doing like? What does your success shift to look like. And then how do you evolve that? Right? So think about your personal accountability tracking with team accountability.

811

02:01:41.390 --> 02:01:46.420

Stephanie Bogan: What you're doing this year might not be the same as you're doing in 3 years. Right? What I'm doing now

812

02:01:46.430 --> 02:01:50.740

Stephanie Bogan: isn't the same as what I was doing when I started, because when I started right, I had to do it all.

813

02:01:51.850 --> 02:01:57.880

Chase Crump: What would be an example of business? So I was just taking. I just copied down what you had on the on the

814

02:01:58.390 --> 02:02:06.810

Chase Crump: yeah, like, health, health, personal goals, professional goals like, what would be something that would go that I would be checking from a business standpoint

815

02:02:07.550 --> 02:02:13.529

Stephanie Bogan: to you like. What if you are like? These are the things that I do

816

02:02:13.780 --> 02:02:18.790

Stephanie Bogan: that generate revenue and abundance in the business. What are they?



817

02:02:19.400 --> 02:02:26.790

Chase Crump: If it'd be my, I guess client calls or client meetings this week. Conversation with clients. Do you have

818

02:02:28.160 --> 02:02:31.949

Stephanie Bogan: 330 households? Basically one a week.

819

02:02:31.970 --> 02:02:36.449

Stephanie Bogan: right? Or 5 a week, right? So you can take those clients. You've got your review process.

820

02:02:36.600 --> 02:02:48.819

Stephanie Bogan: But you might take your top 20 right as a rain making roll. And say, Hey, we're gonna so there's a great podcast, that Michael did with, Oh, my God! It was one of the big heads of one of the big firms.

821

02:02:49.070 --> 02:02:52.029

Stephanie Bogan: He stopped doing reviews. He just called his clients every month.

822

02:02:52.080 --> 02:02:53.679

Stephanie Bogan: It's called. Scald them

823

02:02:54.520 --> 02:02:59.399

Stephanie Bogan: turns out when you call me every month. They don't actually want reviews. They're just like, yeah, chase is there? It's great.

824

02:02:59.960 --> 02:03:09.890

Chase Crump: Yeah, we've got. I'm basically at that point that we're, hey, is everything. Okay? Yes, it's okay. And it's about the only way that I can manage it that they don't all say that they wanna come in

825

02:03:10.010 --> 02:03:19.419

Chase Crump: you know that. I guess that would be too much. I guess I'm just looking for ideas of what if I was looking at this sheet? I got like business

826

02:03:19.580 --> 02:03:33.109

Chase Crump: like, what? What am. I like looking? Personal stuff is easy. But the business, I guess. Would that be it like calls, like calls calls today. So if you were five bigger. What would you be doing with your day?

827

02:03:33.920 --> 02:03:50.029

Stephanie Bogan: Okay? So that, okay, so we say, 5 X, you're saying 5 times, what would you be doing every day like, what is Chase doing in a 5 x business that crushes it?

828



02:03:51.330 --> 02:03:56.369

Chase Crump: It almost see. Okay? So that would put us like a 2.5 billion more

829

02:03:56.670 --> 02:04:00.160

Chase Crump: like, I don't even know it would have to look wildly different.

830

02:04:00.190 --> 02:04:05.749

Stephanie Bogan: That's your work, that's your work. So I had this conversation with Michael when Derek went.

831

02:04:05.820 --> 02:04:23.410

Stephanie Bogan: and he was like, I don't even know when he came back with like what is now his like. The dollar plan, right like it was like years ago. He was like, Oh, I have 20 some, he joked. 22 people. He's like, I'm gonna be done. And then he was like, I'm at 23 people. I'm gonna be done and I giggle. I'm like, no, you're not, because

832

02:04:23.430 --> 02:04:34.089

Stephanie Bogan: once you get to a certain level, it's all about leverage. It's like, oh, the next level, the next level, like all you're gonna get to a point where all you want to do is show up and do ideas you're like, I'm just. I'm the idea person.

833

02:04:34.510 --> 02:04:36.600

Stephanie Bogan: or you retire. That's fine, too.

834

02:04:36.960 --> 02:04:47.930

Stephanie Bogan: So I want you to think about like in a 5 or a 10 x version of your business chase. What are you doing every day? You're not doing half the shit you're doing right now, I promise you.

835

02:04:48.140 --> 02:04:49.060

Stephanie Bogan: Promise you

836

02:04:50.060 --> 02:05:01.860

Stephanie Bogan: so fun, exercise for all of you mark right? Like, what is the current version? What like when you're awesome sauce when you're everything you ever like, prefer like. Oh, I work 25 HA week. I make 3 million dollars a year.

837

02:05:01.880 --> 02:05:12.969

Stephanie Bogan: What? What does that guy look like? What does he do? Does he go to the gym in the morning? Does he drink a glass of water like? If you haven't defined that level of success, it will be a default.

838

02:05:13.700 --> 02:05:17.279

Stephanie Bogan: Our job is to do it on purpose is essentially what we're doing here

839



02:05:17.820 --> 02:05:30.340

Stephanie Bogan: to your point. What are the activities that are gonna make you a 3 mill. I just pick right? \$500,000,002,000,000,000 firm. You're probably not doing half technically 80% of what you're doing right now.

840

02:05:31.600 --> 02:05:36.150

Stephanie Bogan: goal is to ask yourself on the success shifter. What helps me?

841

02:05:36.450 --> 02:05:37.660

Stephanie Bogan: What helps me.

842

02:05:37.810 --> 02:05:48.480

Stephanie Bogan: hey? Find your call 5 clients a week. That helps me. I need to call 5 cois. I need to spend 2 min with my team. I need to like, go find a new marketing channel.

843

02:05:48.590 --> 02:05:55.519

Stephanie Bogan: What hinders me, I don't know. Like checking email set like these are the things that are on my sheet. What helps me, what hinders me?

844

02:05:55.890 --> 02:06:05.799

Stephanie Bogan: What helps me be the best version of me is a leader? Is, do I have a morning routine? Do I do these things right? Did I qualify people this week? Did I write.

845

02:06:05.810 --> 02:06:10.339

Stephanie Bogan: go to 10 podcasts this year, right? The impact and reach is all my thing.

846

02:06:10.630 --> 02:06:24.090

Stephanie Bogan: Personally. That's why, like, I literally have clients that are like, I'm gonna have date night with my husband. I had a woman that was like I'm gonna play. I've been waiting my whole life to play the piano. I'm gonna play the piano twice a week, and that's like, just put it on, man.

847

02:06:24.160 --> 02:06:26.430

Stephanie Bogan: and you know the second that you put it on there.

848

02:06:26.850 --> 02:06:28.080

This wouldn't have happened.

849

02:06:28.660 --> 02:06:34.120

Stephanie Bogan: because that sheet is simple and stupid, and I say that with all love, because I've been using it for 20 years.

850

02:06:34.170 --> 02:06:39.549

Stephanie Bogan: it stares you in the face and said, this is what this is what you said you are.



851

02:06:40.040 --> 02:06:43.730

Stephanie Bogan: This is you at your best stuff, how you showing up. And I'm like, Oh, shit!

852

02:06:44.890 --> 02:07:04.939

Stephanie Bogan: And show up this week. I gotta get better right? It's like it's just a bar. And we as owners don't have anyone or anything raising our bar. That's all leaders is for you guys. You're with all of desperate for like information and accountability, because it sucks to be out there on your own going on. I think I got it right. Do I got it right? I don't know.

853

02:07:06.320 --> 02:07:09.820

Chase Crump: Yes, that's right. You're like, Oh.

854

02:07:10.080 --> 02:07:11.510

Chase Crump: hello.

855

02:07:11.540 --> 02:07:26.029

Chase Crump: yeah. Talk about the in the beauty of it. So like model schedule like for me. One of the powerful thing that I've gotten from you also for is putting in my model schedule. So could that be like a business goal like? Did I stick the model schedule for the day or the week.

856

02:07:26.440 --> 02:07:27.620

Chase Crump: or whatever?

857

02:07:27.890 --> 02:07:33.930

Stephanie Bogan: So anytime I want to change a behavior. Think of it as installing a behavior

858

02:07:34.340 --> 02:07:40.049

Stephanie Bogan: when that behavior is installed. I don't. I don't have to put meditate on my list every day anymore. Why?

859

02:07:40.250 --> 02:07:46.400

Stephanie Bogan: Because it's installed. It's kind of what I do if I slip off a behavior by the way, like

860

02:07:46.590 --> 02:07:54.330

Stephanie Bogan: no fat French fries before 11 am. If I find myself going. Well, there's a lot of French fries in my diet right now.

861

02:07:54.560 --> 02:08:11.110

Stephanie Bogan: and it's like, Oh, no, you know, in fasting until 11 am. So it like this idea that we're done like we're set and done is such Bs. we're humans. You guys, I'm constantly up leveling my coach is constantly, what about this? What I'm like? Oh, God! I got up level like up, level up level.

862

02:08:11.400 --> 02:08:19.799



Stephanie Bogan: The success shifter is your feedback loop. It's between you and God and nobody else. It's that one me, hey, Chase!

863

02:08:20.460 --> 02:08:25.259

Stephanie Bogan: What is the happiest, highest performing version of you? What's that guy do every day?

864

02:08:25.650 --> 02:08:41.750

Stephanie Bogan: And it's saying, hey? The Happy high performing version of me goes to Yoga twice a week or right. He has 5 beers on Friday, or I don't know like I want you all to just invite yourself to say that we never give ourselves this permission. By the way, it's such bullshit.

865

02:08:42.320 --> 02:08:43.190

Stephanie Bogan: hey?

866

02:08:44.160 --> 02:08:45.939

What's the awesomest version of my life

867

02:08:46.980 --> 02:08:55.480

Stephanie Bogan: am I showing up? I'm showing up, and I'm in 5 meetings a week, or I'm like, that's the goal. If you put that shit on a piece of paper and you do it. Your life

868

02:08:55.540 --> 02:08:58.550

Stephanie Bogan: plan will emerge, and if you don't it won't.

869

02:08:59.370 --> 02:09:06.450

Stephanie Bogan: So that's the goal chase like, hey? Right now, what is the happy, high performing version of Chase look like?

870

02:09:06.930 --> 02:09:21.099

Stephanie Bogan: Right? Does he have a partnership meeting once a week? Right? Cause those are important. Does he do like. It's everything. It's not just prospecting. Or mark like this is your personal dashboard, as you're driving down the road that says, here's your personal speed limit.

871

02:09:21.200 --> 02:09:22.549

Mark Wade: How you doing, bye?

872

02:09:24.530 --> 02:09:26.200

Mark Wade: Oh, now, are you there? Oh, no, you're there!

873

02:09:26.620 --> 02:09:30.430

Stephanie Bogan: Oh, you're so patient! I was over. I didn't even know you were there. Still, you're not my camera.



874

02:09:33.130 --> 02:09:34.950

Chase Crump: Okay, that gives me a better idea.

875

02:09:35.290 --> 02:09:36.639

Stephanie Bogan: Ms help. Okay.

876

02:09:36.840 --> 02:09:39.309

Chase Crump: it gives me a better idea on the successor.

877

02:09:39.430 --> 02:09:47.739

Stephanie Bogan: and that you give me some good stuff just to think about, because again, I hadn't like, you're forcing me to consider professional marketing

878

02:09:48.770 --> 02:09:54.540

Stephanie Bogan: human right? I'm like, Hey, I want to give \$10,000, like one of my goals, is to give \$10,000 a month.

879

02:09:56.270 --> 02:09:57.540

Stephanie Bogan: Seems like a good goal.

880

02:09:58.570 --> 02:09:59.629

Stephanie Bogan: How am I going to do it

881

02:10:00.840 --> 02:10:15.200

Stephanie Bogan: so every time I'm like, does it like right? I like. So it's not that it's good or bad. It's that it, for it's a forcing mechanism. If I look at it, I'm like, Oh, am I giving \$10,000 away this month at this charity or that? Sure! How am I going to do it. It's a forcing mechanism

882

02:10:15.790 --> 02:10:20.389

Stephanie Bogan: whether it's give \$10,000 away or right. Go find 50 new clients.

883

02:10:20.570 --> 02:10:25.239

Stephanie Bogan: it says Chase. This is your model for your best behavior. How's it going, man?

884

02:10:25.620 --> 02:10:33.970

Stephanie Bogan: And then we gotta be like, shit! I don't know. I didn't even define it. I haven't even managed it like. We don't even have that conversation with ourselves. We just do.

885

02:10:34.600 --> 02:10:42.519

Stephanie Bogan: And that's where athletes man. They got it like Michael Phelps has a coach every day for 8 HA day. Going

886



02:10:42.780 --> 02:10:50.379

Stephanie Bogan: current turn like a little like one-tenth of agree different, like, all we're trying to do is take that level of accountability

887

02:10:50.490 --> 02:10:53.370

Stephanie Bogan: and build it into our ecosystem. If that makes sense.

888

02:10:56.480 --> 02:11:02.540

Stephanie Bogan: it's a whole raise, like you guys are seriously raising the bar. My invitation to you is

889

02:11:02.840 --> 02:11:11.310

Stephanie Bogan: just pick the next bar. It doesn't have to be the 10 x bar. Right? What's the next? That's why we do that 3 year goal. What's the next version.

890

02:11:11.980 --> 02:11:28.600

Stephanie Bogan: Are you on the phone with your top clients or your top cois? Are you great talking to one? I'm just making sure, like, am I out in the world talking to one marketing or podcast or something. Right? Am I doing external promo once a week? What are the you can really start with? You

891

02:11:29.120 --> 02:11:40.809

Stephanie Bogan: get yourself to a good point. Mine is all like right mindset meditation am I doing? And then it? And then it's did I qualify people this week. Did I do one add a quarter? Did I right? Did I do those things

892

02:11:41.060 --> 02:11:44.390

Stephanie Bogan: so you can layer that. Get all the roads you want?

893

02:11:44.600 --> 02:11:48.510

Stephanie Bogan: My advice is, don't do 19 at once, because it gets overwhelming.

894

02:11:49.050 --> 02:11:56.380

Stephanie Bogan: So I tend to start with me because I know all the research says. As a leader, I am the biggest factor in my success.

895

02:11:57.030 --> 02:12:10.250

Stephanie Bogan: and then, when I feel pretty good about me, I expand like all call. 10 prospects are off me 5 new. But first I always start with like, where's Steph? Is Steph locked, loaded, and ready to go like she lit up and ready to change the world, because if she's not

896

02:12:10.260 --> 02:12:15.909

Stephanie Bogan: none of that othership matters, if I'm not there, everything else is compromised. If that makes sense

897

02:12:18.770 --> 02:12:22.300



Stephanie Bogan: great, you guys got your personal accountability for this quarter.

898

02:12:24.240 --> 02:12:25.080

Stephanie Bogan: Ed.

899

02:12:26.940 --> 02:12:29.900

Stephanie Bogan: you're ready. My husband? Sorry. Yeah.

900

02:12:30.230 --> 02:12:32.560

Ed Woehlcke: Oh, good. That that was awesome. Thank you.

901

02:12:33.140 --> 02:12:53.929

Stephanie Bogan: Right. So we're gonna get really personally accountable. We're gonna get practice accountable with the Kpi worksheet chase our workers leaders is to make that success shift or reflect both. How are we showing up personally? What do we need to practice to do, hey? I need to have 4 coi meetings. I need to have one partnership meeting like what helps you build your goals.

902

02:12:53.940 --> 02:13:01.379

Stephanie Bogan: What hinders you don't do that. And then, personally, what help? It's just to help senders. You're just habit stacking

903

02:13:01.710 --> 02:13:03.129

Stephanie Bogan: habits that are good.

904

02:13:03.230 --> 02:13:05.209

Stephanie Bogan: more of habits that are bad.

905

02:13:05.230 --> 02:13:10.010

Stephanie Bogan: Lesa. All this sheet is the single best way that I know.

906

02:13:10.110 --> 02:13:11.249

To have it stack

907

02:13:11.400 --> 02:13:16.580

Stephanie Bogan: and habit stacking is deciding how you need to show up and behave

908

02:13:16.780 --> 02:13:24.769

Stephanie Bogan: in a way that's aligned with your goals. If I want to be Miss U.S.A. and I continue to eat French fries all day every day.

909

02:13:25.140 --> 02:13:27.539

They can't just not gonna happen.



910

02:13:27.910 --> 02:13:35.140

Stephanie Bogan: They are not given these hips to Miss U.S.A. It's okay. I'm good with that. But I know that cause it's not my goal.

911

02:13:36.030 --> 02:13:38.980

Stephanie Bogan: If I wanted to be Miss U.S.A.,

912

02:13:39.160 --> 02:13:40.549

I would eat a lot less

913

02:13:42.040 --> 02:13:47.230

Stephanie Bogan: like that's just an example, right? Like I would have to put on that sheet eat. Let us today.

914

02:13:47.520 --> 02:13:52.130

Stephanie Bogan: So what is the goal that you're really shooting for as a leader

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02:13:53.250 --> 02:14:10.689

Stephanie Bogan: and your goals is the leader, are personal. Their performance and their profit right personally, what am I doing? Am I happy? Am I showing up and delivering results? Are the profits there? And so you can kind of think in those buckets right personally am I walking the dog? Am I eating good food? Am I hanging out with my wife.

916

02:14:11.150 --> 02:14:21.199

Stephanie Bogan: you know, professionally. Am IA good leader? Then I do it like. And then tactically like, what do I have to do? Practically, I gotta call 10 people. I gotta find a podcast to talk to like

917

02:14:21.920 --> 02:14:26.850

Stephanie Bogan: it's more a hang up in our head honestly than it is anything else.

918

02:14:29.950 --> 02:14:37.779

Stephanie Bogan: Pick one or 2 things, put them on the list. Do those one or 2 things, then the next 2 or 3 things like you'll get in the habit of it. But that's the important part.

919

02:14:39.860 --> 02:14:41.450

Stephanie Bogan: Right? Good, sir. Does that help?

920

02:14:41.970 --> 02:14:48.889

Stephanie Bogan: It? Does? Thank you. Good. Combo. Yeah.

921

02:14:49.220 --> 02:14:59.009

Stephanie Bogan: You're only going to do those things if you're operating your best leaders. That's what leaders is all about like, it's the mindset shifts more than anything else, because without them



922

02:14:59.100 --> 02:15:01.700

Stephanie Bogan: you're not gonna make the other changes. You're just not

923

02:15:04.160 --> 02:15:06.710

Stephanie Bogan: alright guys. So this quarter vision

924

02:15:06.870 --> 02:15:23.639

Stephanie Bogan: mindset habits. Now, we're translating those habits into right kpi. Success shifter like actual accountability tools, because holding ourselves accountable is the hardest but most important thing that we do when we want to raise the bar. When I want to raise the bar on myself.

925

02:15:23.650 --> 02:15:25.939

Stephanie Bogan: It's a commitment that I make

926

02:15:26.710 --> 02:15:27.480

right.

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02:15:27.680 --> 02:15:42.419

Stephanie Bogan: and that's what leaders is all about. You've all made that commitment to raise the bar. So as you think about your Kpi, and you think about your success shifter. What is the what's the business look like when it hits the goal? That's what the Kpi worksheet is right relative to goal.

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02:15:42.970 --> 02:15:47.739

Stephanie Bogan: How are you performing relative to goal is what the success shifter's about.

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02:15:47.950 --> 02:15:55.749

Stephanie Bogan: How are you showing up? What are you doing? The goal is to shift that sheet over time to things that you genuinely love to do that are valuable to business.

930

02:15:56.870 --> 02:16:00.240

Stephanie Bogan: Alright guys. I gotta go give another speech. So I gotta be able.

931

02:16:00.840 --> 02:16:08.489

Ed Woehlcke: Alright, so fun hanging with you guys. I will see you very soon. If you have any questions about your sheets, your kpis.

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02:16:08.590 --> 02:16:17.789

Stephanie Bogan: please don't hesitate to reach out. That is what we're there for, but nail it. So you get really clear about what you need to do as you step into that next level of success.

933

02:16:18.260 --> 02:16:20.540

Ed Woehlcke: I don't. Awesome, thank you.



934

02:16:20.560 --> 02:16:22.359

Stephanie Bogan: Crush it. Talk to you.

