

# LIMITLESS Coaching Call Transcript

March 4th, 2024  
Lifestyle Coaching Call  
Peak Practice

WEBVTT

Adam Cmejla, CFP®: Today, we're going to be talking about building accountability.

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00:12:56.990 --> 00:13:01.740

Adam Cmejla, CFP®: And this is this is something that is.

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00:13:02.140 --> 00:13:11.289

Adam Cmejla, CFP®: everybody has accountability in different ways, or we are accountable to different people in different ways. If I think back to my excuse me

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00:13:11.440 --> 00:13:23.299

Adam Cmejla, CFP®: if I think back to my journey, which had, you know I consider my career kind of having having 2 different chapters the first 10 years, and now the last 5 ish years or so the person that I was

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00:13:23.300 --> 00:13:48.269

Adam Cmejla, CFP®: prior to limitless is we've already had the memorial. We've set our piece but he is dead right. That that version of Adam is long gone, and I really don't ever really care to revisit that version of who I was as an advisor, or what the business was looking at. That doesn't mean to say that everything is completely fixed and that everything is a well oiled machine. There are certainly different issues and problems and challenges.

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Adam Cmejla, CFP®: The business faces faces right now, but those are what we call high quality problems to have the ones that I had for the first 10 years or so we're just

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00:13:56.490 --> 00:14:16.410

Adam Cmejla, CFP®: for lack of better word pain in the ass problems. That I, the the common denominator there, was that I couldn't get out of my own way. But with that being, said, one of the keystone factors that has to be in place. If we want any type of growth to happen is, we must figure out what type of systems.

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00:14:16.950 --> 00:14:19.590

Adam Cmejla, CFP®: people and

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00:14:19.840 --> 00:14:28.880

Adam Cmejla, CFP®: processes we can have in place to hold us accountable, because there is a very, very, very distinct

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00:14:29.100 --> 00:14:32.910

Adam Cmejla, CFP®: difference between wanting something

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00:14:33.100 --> 00:15:00.169

Adam Cmejla, CFP®: and being willing to do the things necessary to get the output that we all want to have. All of us on here have an idea of. You're all here for a certain reason. Right? This comes back to the big why, which we'll talk about here in a little bit. You're all here. For some reason or another there is some motivating factor. There was some capitulation point that happened in your personal and or professional life that says, Alright, enough's enough, and I remember

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Adam Cmejla, CFP®: in the first year there was there was an advisor was saying, All right, if it just, if if you tell me to wear purple underwear in a pink jumpsuit to a client meeting, because that's what you do, and that's what brings in tens of millions of dollars. I don't care. I will wear purple underwear in a pink jumpsuit like that's the level of commitment that I had at that time, because I was sick and tired of being sick and tired, and I knew that I had to hold myself accountable both internally with myself as well as

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00:15:25.970 --> 00:15:46.200

Adam Cmejla, CFP®: right. What's the oh, who wrote the book? Baumeister? I can't think of his first name. Willpower. It was Caroline Dweck and Bowmister, I believe, are the 2 authors that kind of publish a seminal paper in the late seventies, maybe early eighties, I think it was. Don't quote me on those dates, basically affirming and and and

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00:15:46.250 --> 00:15:51.530

Adam Cmejla, CFP®: quantifying to us in research and

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00:15:51.750 --> 00:15:55.029

Adam Cmejla, CFP®: like peer-reviewed journals. That willpower is not enough

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00:15:55.220 --> 00:16:16.840

Adam Cmejla, CFP®: that we can't just say that. Oh, we want these things to happen, and then they magically happen. Willpower is not enough. So we need to have systems and people in place in order to help hold ourselves accountable. And so that's what we want to spend some time talking about here today. We will spend some time going back. And this is again we spend so much time in the first part of this in the first part of the coaching program.

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Adam Cmejla, CFP®: talking about why we focus on clarifying the vision because it's not if it's what and it it's how many different times and what types of resistance you are going to face when you're going through this, because if you want something you've never had before, which is the vision of the practice that you want to have and the benefits to your clients, to yourself to your team, to your family, right? All of those benefits. If we want something that we've never had before.



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00:16:45.190 --> 00:16:50.859

Adam Cmejla, CFP®: we must be prepared to do things that we have never done before. because right? If

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Adam Cmejla, CFP®: otherwise, things would just happen, and that wouldn't make sense right? We couldn't just keep doing the same things that we are doing and expecting different results. Right? We all know that phrase, or I'm assuming we all know that phrase which is the definition of insanity, or, as I learned from Steph back in 2018, the Einsteinian set of word. It is now the Einsteinian approach or a twist on. That is, no problem can be solved with the same consciousness that created it.

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Adam Cmejla, CFP®: So we first must figure out, what vision do we have? And then we go through and figure out. Okay, based off of all the different levers that we can pull in a practice

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00:17:26.690 --> 00:17:31.489

Adam Cmejla, CFP®: which combination of letters and

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00:17:31.780 --> 00:17:43.989

Adam Cmejla, CFP®: what combination of letters, what combination of levers, and in what chronological order, are going to allow me slash my practice to get from where it is right now

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00:17:44.000 --> 00:17:57.999

Adam Cmejla, CFP®: to the vision of what I end of, of what I want it to turn into. And little side note here, it's okay. If that vision changes the vision that I had for year one year 2 you know, Adam, year one year 2, Adam 2018 to 2019.

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00:17:58.140 --> 00:18:04.339

Adam Cmejla, CFP®: That vision is very, very different than what it is right now. So you have to give yourself permission for that vision to change.

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00:18:04.510 --> 00:18:27.249

Adam Cmejla, CFP®: But you have to have a vision. And then it's about, okay, well, what do we need to do to create the positive mindset and habits that are going to support us through that? So that when we are tested with resilience. Excuse me when we are tested with resistance. We have the resilience to push through that ground ourselves in the vision of what we had for the business.

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00:18:27.360 --> 00:18:42.660

Adam Cmejla, CFP®: and then ask ourselves that question of all right. Well, who and or what do I need to lean into the who can be the support structure of limitless coaching calls, friendships and collaborative re relationships that you have with the members in limitless

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00:18:42.660 --> 00:18:59.629

Adam Cmejla, CFP®: and the systems that you have in place, your daily devotionals, your mount, your morning routines, your I was just talking with in our in in my cohort, the the the coaching court that I'm



that that I'm covering for a handful of advisors that have been rolled in that on last Monday's call

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00:18:59.790 --> 00:19:10.089

Adam Cmejla, CFP®: one of the advisors had a great win. He had a Jeremy had a great example of sticking to his vision, and basically

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Adam Cmejla, CFP®: having this conversation with a client that says, Well, this is the way it's going to be going forward, and it's either step up or step out. Not in those exact words. But that's the point. And so my question to him was, Okay, where do you? Where are you? Gonna put that?

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Adam Cmejla, CFP®: What I mean by that is, you need to have some type of I have a wins notebook. When I was going through all these changes in evernote, as I would get these little success nuggets, I would drop them in my evernote called a wins notebook, because when we have these resistance points that we're going to feel as we make these changes into our business.

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00:19:41.000 --> 00:19:59.720

Adam Cmejla, CFP®: I knew myself well enough to say that I need to go back to the well. I need to have something that I can go back to to kinda pick myself up when I get punched in the face a little bit right. That famous Mike Tyson quote. Everybody has a plan until we get punched in the face. The limitless version of getting punched into face is clients asking to compromise on our fee schedule clients, asking to compromise on our

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00:19:59.890 --> 00:20:02.459

Adam Cmejla, CFP®: on our service model.

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Adam Cmejla, CFP®: picking up the phone and dialing for dollars and and calling prospects and getting 25 no's in a row or producing podcasts for weeks, months on end, without a single trip, like all of those pieces of resistance, are going to come in. We need to have something to go back to the well to. And then, when we do create those positive mindsets and habits, then it's about, okay, well, how do we keep that in a repeatable and sustainable process? How do we systematize that.

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Adam Cmejla, CFP®: to be able to allow us to easily go back to that when again, we're faced with that growth. So that's why we spend so much time in the beginning of limitless

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Adam Cmejla, CFP®: continuing to come back to these points, because in all different aspects of as we get tactical, if you will, in limitless as we move through the year, as we start really diving in on your service model and your fee structure and your how you structure your client meetings. And as we lean into growth, and we talk about top, middle, and bottom of funnel activities, all of that will share in some aspect.

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Adam Cmejla, CFP®: It'll come back to the vision. It'll come back to your habits. It'll come back to your system. So that's why we really pound this home during a lot of these calls in the beginning of the year, because again, they're the common denominator from a strategic standpoint. As we get more tactical in a lot of what we're gonna talk about here.

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Natalie Bergsma: Yeah, I think, Adam, the the conversation around wins is a a big one, right? Because accountability and showing up is

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Natalie Bergsma: it's hard work, and we need those motivators. So I'm curious. Anyone in the room who's been digging in and working hard and meeting resistance. Can you share a big win that you've had with us.

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00:21:43.930 --> 00:21:47.030

Christian Battistelli, CFP®: Nobody. We're all failing miserably.

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00:21:48.090 --> 00:21:53.829

Natalie Bergsma: It's that group. Think conversation be the first person to speak up. You got this.

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00:21:55.670 --> 00:21:58.550

Adam Cmejla, CFP®: I'll jump in if nobody else will. Yeah, go ahead

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Christian Battistelli, CFP®: big win. So had a pretty big ideal, one of my top clients, ideal clients, situation, wise and everything that we were just really grinding through a lot of work for them and want to buy house. And there was just a lot of coordination between mortgage broker accountant on kind of where to pull. What company to pull this funds from. How do we fund? It

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00:22:16.470 --> 00:22:36.489

Christian Battistelli, CFP®: was supposed to be a downsize turn into a 600,000 upgrade as they typically do. And it was just a lot of work, and it kind of really through my schedule for loop. But when we came through it, just the feedback I got the client. So over the moon thrilled, and we really nailed down their kind of their clarity on their financial purpose

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00:22:36.600 --> 00:22:40.690

Christian Battistelli, CFP®: living in their wealth and not just seeing it grow on a piece of paper.

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Christian Battistelli, CFP®: And so that was a huge win for me to see like when you do things, the way we want to do them in terms of like really quarterbacking everything every professional like do that that service model that we wanna implement with everyone. You know. This is the benefit. And and this is kind of what clients get out of it, which again, seemingly seems like a normal process, like buying and selling a house. But you can turn that into from like an incredible client. Experience to a life, changing event



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Christian Battistelli, CFP®: just with a different mindset and a different approach to it.

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Christian Battistelli, CFP®: And so that's life changing for this client. And that was, that's something that I keep kind of top of mind for me is a big one.

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00:23:18.250 --> 00:23:22.299

Christian Battistelli, CFP®: It's a reminder that the work that we do, hey? Actually matters right?

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Natalie Bergsma: Well, it's not so interesting because some of what you have done for this client we're talk about doing for yourselves, right? Clarifying your vision, getting clear on the mindsets that you need to kind of get there and execute. And that's really where we're gonna dive in next is to get those results that you want. It's one thing to have clarity.

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Natalie Bergsma: it's another to show up and consistently do the work and have the people and systems in place. But, more importantly, just

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00:23:52.790 --> 00:23:55.890

Natalie Bergsma: connecting with yourself. So as we look back

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Natalie Bergsma: at this sort of first quarter, all the things that we focused on clarifying your vision, getting really crystal clear on, why you're showing up. Look, you guys are smart, intelligent people. You could go anywhere and do anything and probably be successful. But why have you chosen to do the work that you're doing right. And then

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00:24:16.260 --> 00:24:45.130

Natalie Bergsma: how am I gonna execute on that purpose? And that mission and that vision? What does it actually look like for my business. That's different from someone else's right. Adam. Why did you, you know, pick working with Ods right? Because it was important to you it meant something. It mattered right? And then how do you structure it so that you can do really good work? What's the business plan to get there right creating those pieces right? But then, how do we show up every day? What's our daily practices?

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00:24:45.130 --> 00:24:51.330

Natalie Bergsma: What is? You know? What's our email pro process is, you know, how do we really really show up?

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00:24:51.430 --> 00:25:10.470

Natalie Bergsma: And this last part that we're gonna dive in today? Which is, how do we create accountability systems? Not so that we're only accountable by external factors, because that's what most of the world relies on, and that's why most of the world fails. You can't just



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00:25:10.550 --> 00:25:25.510

Natalie Bergsma: be accountable to your clients or to other people, because it's not enough to do the in the weeds day to day work. You have to learn how and get better at being accountable to yourself.

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00:25:25.830 --> 00:25:29.299

Natalie Bergsma: How do you decide to show up and do the work

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00:25:29.330 --> 00:25:42.070

Natalie Bergsma: every day? And so that's kinda what we're gonna dig into today is how to create a system and structure for accountability, so that you can be accountable to yourself and put those processes and people in place.

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00:25:43.460 --> 00:26:10.899

Adam Cmejla, CFP®: So I in true Adam fashion, I probably said a lot of what I should have said on this slide, maybe about 4 min ago, so I don't know that I'm gonna spend a whole lot of time right here to continue with what Natalie mentioned. Right? If you have to have some type of platform in front in place, if we've if any of you have. It's on our reading list. I think it's up like on the first the the first reading list that you get from us. One of those seminal books that we recommend is atomic habits.

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Adam Cmejla, CFP®: Those of you that have read it know what I'm talking about, those of you that have not read it. I would again challenge you to put that at or towards the top of the list, to go back and look at because the thesis, if you will, or the

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Adam Cmejla, CFP®: the the idea from that book that James talks about is that we don't rise to our goals, we fall to the level of our systems. And one of the systems that we have to put in place is what is the way in which we're going to hold ourselves accountable to our business. Peter Drucker, long time management consultant for gosh! I think he started out at Ibm, and then kind of made his way through a lot of the big companies that we would recognize here today, wrote, I think.

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Adam Cmejla, CFP®: probably close to a dozen books on leadership and management but for bigger companies. But the principles apply at the smaller level as well. One of my favorite quotes from him is, what gets measured gets managed, and what gets managed improves.

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Adam Cmejla, CFP®: And so, if I were to ask all of you this, this ties into the or that philosophical approach

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Adam Cmejla, CFP®: also ties very well into the teachings from traction with Gina Whitman. Which is this idea of what are the rocks that you're Gonna put in place. What are the what are the the non negotiable items, the non negotiable projects, the non negotiable changes that you're going to impose on your practice over X period of time, monthly, weekly, quarterly annual right



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Adam Cmejla, CFP®: to improve, to get us from where we are, to where we are, to, where we wanna be and how do we keep those in front of us? So one of the ways in which we wanna do that is by having our practice Kpis. And we talked about practice Kpis in our very first session back in or our excuse me, our first virtual retreat when we kicked off the program in early January, the key performance indicators of a practice. We certainly wanna make sure that

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Adam Cmejla, CFP®: that, we're tracking quantitatively the result based off the inputs. This is why I love financials, not the financial planning side of things, but financials from a business standpoint, because they're unemotional and they don't lie.

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00:28:12.660 --> 00:28:27.909

Adam Cmejla, CFP®: And one of the things that I talked to our old clients about, or that I talk about. And then Coach John and Kate to talk about with our clients that we serve is, there is a very big difference between reading and comprehending our numbers.

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Adam Cmejla, CFP®: I can pick up. To. To use this metaphor, I can pick up something written in Spanish. Okay? And I can read it.

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Adam Cmejla, CFP®: I don't comprehend it.

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Adam Cmejla, CFP®: so I can read my financial statements. I can read my profit loss and my balance sheet and my statement of cash flow, and I can look at my production numbers, and I can pull up a Rhine, and I can look at my aum, and what my inflow and outflows that like. Pick whatever kpis that you, as an advisor.

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Adam Cmejla, CFP®: have deemed to be necessary to improve, which, again going back to what I talked about. Go back to your big why, what is it that needs to change in your practice, or what combination of things need to change, to get you to the place of from where you're at to where you wanna be, and what Kpis, are you going to consistently measure? So again, we could create all kinds of different kpis. One of those

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Adam Cmejla, CFP®: is the

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Adam Cmejla, CFP®: keep. Perform that this this Kpi dashboard, if you will. That just kinda gives you that cross section of what a normal advisory practice looks like. We have revenue that comes in. We have expenses that go out. We as business owners have what's left. And I don't even like using that word. What's left because we teach. And we're very big on intentional practice ownership. And wanna make



sure that. Okay, we're setting up the business from a profitability. First, to use Mike Mcallow. It's in his book up the profit first aptly named

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00:29:48.410 --> 00:29:55.179

Adam Cmejla, CFP®: translation. What type of profit margin are we targeting? And we're gonna talk more about this in the virtual retreat or in the

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Adam Cmejla, CFP®: we're gonna get into a little bit more detail in next week's virtual summit as we talk through. Just kind of what that, Kate, how how we, how we track. I talk with business owners about your profit loss statement being a game of plinko. Right? You drop a dollar in, and every line or every bump that it hits on the way down is an expense in the business, and where we essentially get what's left. But we wanna manage from the bottom and get on the way up. So this is one example of

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Adam Cmejla, CFP®: how we would use kpis of revenue that we're bringing in. We would be tracking our expenses. We would translate that into what is our revenue per client need to be. We then take that into consideration, based off of the number of hours that we plan on working and dedicating to client service in our firm. And we're saying, Okay, well, how many clients can I serve based off of the amount of time that I'm going to allocate to direct client service. When we do that math we realize that we can serve

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00:30:47.240 --> 00:30:53.690

Adam Cmejla, CFP®: 100 clients. There's a firm in Indianapolis here. I know a couple of advisors that where they're with the amount of

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00:30:54.140 --> 00:30:59.309

Adam Cmejla, CFP®: time that they dedicate to each client relationship, each lead advisor only works with 45 households.

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Adam Cmejla, CFP®: There is no magic number there is, I know 100 is a round number that gets thrown out. My point is, you have the agency. We're giving you that agency and permission to craft your business intentionally on paper on purpose first.

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Adam Cmejla, CFP®: and then build the systems and fee schedules and service models around that. This is one example, again, where we can build a Kpi dashboard, which is again very quantitative, as it pertains to revenue per client. But again, you can craft this, however, you want based off the other thing that that's not directly on here. But I would say, all of us want to track as a Kpi are the number of out of office days that we have. That's why we spend time with the calendar. So, taking time off first and putting that on the calendar first

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00:31:42.990 --> 00:32:06.739

Adam Cmejla, CFP®: and then building the business around. That is a all is another good of forcing mechanism back to the systems and accountability. If it's on. If you know, show me your calendar, show me your checkbook and I'll show you your priorities. If you are putting those constraints around the



amount of time that you're gonna spend in the business starting with your time out. It's now your job to reconcile what's time? What time is left with this spreadsheet here. So

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00:32:06.740 --> 00:32:13.069

Adam Cmejla, CFP®: Natalie, anything that you would add on top of that to complement to complement this worksheet, or what I've shared already.

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Natalie Bergsma: Yeah, I mean, I think the reason that I love data so much is it tells a story, and it doesn't lie right. So when you're running these numbers consistently. It's a way to hold yourself accountable. I remember a client I had probably 10 or 15 years ago.

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Natalie Bergsma: and we did the practice benchmarking on a monthly basis, which is a lot because he was trying to grow. But he was really struggling to adhere to minimums. He just really loved everyone. He was a great person like just wanted to help

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Natalie Bergsma: anyone that he could. But we come to the realization. Is that like, look, you're not a nonprofit business. If you wanna be a nonprofit, go start one. Otherwise you are in this business to do good and to make money, which means we have to put some boundaries in place, and so every time we pulled this up and we saw the numbers consistently go down for 6 months.

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00:33:09.220 --> 00:33:38.259

Natalie Bergsma: For 6 months we had the conversation. Hey! What's going on behind the scenes? Right, let's take a peek under the hood. Oh, I negotiated that fee. Oh, I negotiated that fee right, and what happened was through that, through having that conversation on a regular basis, through looking at the numbers, he started to become more aware of what was actually happening right? The same way we talk about being aware of your mindset, how your thoughts impact your actions. This is a way for you to kind of look at where your

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Natalie Bergsma: making changes

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Natalie Bergsma: that you might not necessarily see and have them sort of show up in your face right? And after about 6 months that he was like, Okay, Whoa, Whoa! Can't do this. We can't do this anymore. Right? This is, you know, the cost of this was the high, a higher for a new person, someone to leverage his time more.

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Natalie Bergsma: So, you know, data is not always the most fun thing, but it tells a story. It's gonna help you hold yourself accountable. And so deciding what it is that you wanna track and how you want to track it is really important and critical. Laura had a great question, which is, well. Do I share this with my team?

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Natalie Bergsma: And I think it depends on your firm and your comfort level with transparency.

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Natalie Bergsma: I am a big fan of transparency, because guess what? Your team can't help you. They can't support you. They can't impact the numbers if they don't have awareness

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00:34:33.580 --> 00:34:55.680

Natalie Bergsma: of the numbers or what's going on behind the scenes. So if you're at the point where you feel uncomfortable about the paycheck that you're writing yourself, and you can't show your team the numbers. There's a whole nother conversation that we need to have. But I review this with my team goals, revenue Quarterly and an annual basis like the beginning of the year. When we set the vision.

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00:34:55.830 --> 00:35:22.499

Natalie Bergsma: we set the vision, we set the metrics, and then we share them on a consistent basis. Where are we? What can we shift? What can we change? Jenny just came to me and was like, I don't think we need this software. This was, there's one over here that does this and 2 other things like, I think, that that would help us meet our expense goal. Can we do that? Yes, absolutely. So. I think it's it's not just about you like being able to share this with your team helps create accountability for them as well.

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Adam Cmejla, CFP®: Oops.

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Natalie Bergsma: My other favorite accountability tool, as simple as it sounds, is the success shifter. If you guys are not using this yet, you need to. So here's why

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Natalie Bergsma: it's a piece of paper. And I know that some of you love your technology. And if you're really consistent and amazing with your tech or your habit tracker tools. I'm not gonna tell you not to use them like Streak or any of those, but for most of us our phones are just another distraction.

142

00:35:59.190 --> 00:36:10.149

Natalie Bergsma: I pick up my phone. I get my habit tracker oop. Next thing I know, right? I'm on social media. I'm doing something else. There's also a ton of pee research that says like, if it's in your face, you can't ignore it

143

00:36:10.320 --> 00:36:17.619

Natalie Bergsma: right. If I have my piece of paper that's sitting on my desk every day, and I sit down. It's staring me in the face

144

00:36:17.630 --> 00:36:29.209

Natalie Bergsma: right? And if I see those numbers every day staring me in the face. I cannot ignore the fact that I'm supposed to be on LinkedIn for 30 min every day to grow my business.

145



00:36:29.490 --> 00:36:43.209

Natalie Bergsma: And yet I'm not doing it right. It creates that layer of accountability. There's also a ton of research that shows that actually writing down your goals or the things that you're tracking on paper

146

00:36:43.340 --> 00:37:10.020

Natalie Bergsma: is more tangible and translates more to retention than something like typing or using an app. So when we talk about the success of those are all the reasons that we we want you to use the paper version. We feel like I'm a techie. I need an app. There's a ton of them. Ask me what they are. I can go with that. But really this is about consistently reinforcing your habits every single day.

147

00:37:10.230 --> 00:37:18.359

Natalie Bergsma: The one thing that I see a lot of people do here, and then we're gonna open it up for people to kind of share their feedback is putting too much

148

00:37:18.420 --> 00:37:19.450

Natalie Bergsma: down

149

00:37:19.550 --> 00:37:32.220

Natalie Bergsma: right, like, I've got a list of 47 things that I'm working on on a daily basis to make changes most of the time. When you do that you're more than likely to make no progress at all.

150

00:37:32.600 --> 00:37:44.299

Natalie Bergsma: So, as you look at your success structure, be really clear about what are the one or 2 things that are gonna move the needle for me in each of these areas. When those are consistent

151

00:37:44.320 --> 00:37:46.400

Natalie Bergsma: and become a habit.

152

00:37:46.780 --> 00:37:53.970

Natalie Bergsma: you can take them off. The success shifter and put on something new, right when I don't put on my success. Shift or brush my teeth every day.

153

00:37:54.550 --> 00:37:55.420

Natalie Bergsma: Right?

154

00:37:55.660 --> 00:38:11.569

Natalie Bergsma: My kids version of a success shifter. I put on there. Brush your teeth every day, because if I don't ingrain that habit for them right, it's not gonna show up consistently, and we know that it takes at least 66 for some people more to create and ingrain that habit.

155

00:38:11.660 --> 00:38:24.720

Natalie Bergsma: So I'd love to hear from someone who was like, I don't want to use the success shifter. Who has decided that they were? Gonna do it? And how's that gone for you? Anyone meet resistance with it, and feel a change of heart.



156

00:38:32.600 --> 00:38:53.499

Adam Cmejla, CFP®: This is again where the engagement I know from nobody talking to now. There's like 4 people that want to talk and back and forth. So I've been using my success. Success shifter monthly for over 1314 months. Now love it.

157

00:38:53.620 --> 00:38:54.650

Clark Bixler, CFP: Great idea.

158

00:38:55.290 --> 00:39:07.639

Adam Cmejla, CFP®: Clark, can you talk a little bit about the to Natalie's point. I think it's I think it's it cannot be overstated. The importance of not overwhelming yourself. Can you talk a little bit about your journey with it. Did you

159

00:39:07.720 --> 00:39:12.970

start with just like, Hey, let me just get good at 3 things first, and then compound on top of that.

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00:39:13.700 --> 00:39:25.769

Clark Bixler, CFP: Yeah, like, most people like, I ripped off and deployed directly from the limitless website and used most of the existing stuff that was on there. Between, you know, fitness, sleep.

161

00:39:26.020 --> 00:39:31.780

Clark Bixler, CFP: There was professional goals, personal goals, pipeline goals. I've noticed that I've

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00:39:31.820 --> 00:39:38.680

Clark Bixler, CFP: I've hung on to pretty well the health and fitness sleep stuff as well as the

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00:39:38.710 --> 00:39:43.169

Clark Bixler, CFP: personal goals of like meditation and and half days and

164

00:39:43.230 --> 00:39:52.750

Clark Bixler, CFP: but it's like to Natalie's point. It's right here on my desk every day I print off a new one at the beginning of each month.

165

00:39:52.960 --> 00:40:01.939

Clark Bixler, CFP: There's a number of things on here that I wish I did a better job tracking like I've got, you know. Read 20 min per day. I feel like that is something that

166

00:40:02.070 --> 00:40:09.750

Clark Bixler, CFP: yeah. For the first 6 months of limitless. Last year I was sticking to really well and and haven't done very well with in the last few months.

167

00:40:09.970 --> 00:40:28.409

Clark Bixler, CFP: I love my kids and I spend a lot of time with them in this career affords us that. But I

have here, like book time with kids 4 times a month, and yet I don't find myself checking that box off for some reason as much as I should but otherwise it's been really helpful just to keep things front of mind.

168

00:40:28.920 --> 00:40:36.940

Natalie Bergsma: Yeah, I think that's a really great example, Clark, of where this can also show where we meet resistance.

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00:40:37.380 --> 00:40:50.050

Natalie Bergsma: And we're not gonna get it today. But that's a place to look. What has me resisting these 2 things? What has me not showing up and scheduling time with my kids. What has me not

170

00:40:50.230 --> 00:41:16.769

Natalie Bergsma: spending the time reading and like really being able to look at it? Not just from what I'm being successful at and creating good habits for. But what's behind the places that I see resistance? And sometimes it's like, Look, I get enough time with my kids. I don't really need to do that extra thing, and so I need to take it off the list like, let's not have something on our list that we don't need to do right. That's the hey? I brush my teeth, I get it. I'm good.

171

00:41:16.790 --> 00:41:20.570

Natalie Bergsma: But sometimes it tells us, Hey.

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00:41:21.380 --> 00:41:43.620

Natalie Bergsma: that's something that I need to be working on right for me like it's that LinkedIn thing like getting online. You know, I had to completely shift my mindset around how I show up in the world of social media to get comfortable with it, because the resistance had nothing to do with finding the 30 min the resistance had to do with

173

00:41:43.720 --> 00:41:54.849

Natalie Bergsma: showing up and having my voice heard in the world, right? So it allows us to take a deeper dive and see, you know, a peek behind the scenes of what's really going on.

174

00:41:55.830 --> 00:42:14.150

Clark Bixler, CFP: It's no surprise I like to work out. I like to sleep. I like to meditate, and those boxes are checked almost every day but the other, you know, and that has an effect on on life in business. But some of the others, you know. Am I? Am I prospecting? Am I only checking email twice a day? That's that's not getting as checked as frequently

175

00:42:14.180 --> 00:42:15.369

Clark Bixler, CFP: as the others?

176

00:42:15.510 --> 00:42:16.210

Yeah.

177

00:42:17.120 --> 00:42:21.460



Natalie Bergsma: alright. Well, what are you gonna take away from this conversation. Clark, what's your next best step?

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00:42:24.120 --> 00:42:27.089

Clark Bixler, CFP: The success shifter in particular. Yeah.

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00:42:28.480 --> 00:42:29.650

Clark Bixler, CFP: huh?

180

00:42:38.360 --> 00:42:45.739

Adam Cmejla, CFP®: Or is it just working really? Well, there really isn't a change that. Yeah. Well, I'm I was, gonna say, in a lot of ways things are going really well. But I mean, there's

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00:42:46.390 --> 00:42:54.679

Clark Bixler, CFP: I mean, definitely on the personal side of things. And and even some of the professional components like the checking email twice a day. And that's something that

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00:42:54.750 --> 00:42:57.130

Clark Bixler, CFP: I just made a note of about

183

00:42:57.690 --> 00:43:01.029

Clark Bixler, CFP: you know, creating positive habits like, I still have the email up

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00:43:01.780 --> 00:43:14.169

Adam Cmejla, CFP®: on the left screen, Adam, and as as efficient as our lives can be these days with virtual, you know, with virtual meetings like it's, I'm still looking at it.

185

00:43:14.670 --> 00:43:21.159

Clark Bixler, CFP: And and thankfully, I don't get a lot of emails these days, which is a good thing, but I'm still looking at it. I don't need to.

186

00:43:21.260 --> 00:43:42.510

Natalie Bergsma: So that's something I should just you still just tie one off. You're just kind of put it around. And yeah, well, so sometimes we need systems to support us, because the habit is so ingrained. So for those of you who are sucked into email. Most of us are. We all have that bad habit. My recommendation is a tech. There's an app called freedom.

187

00:43:42.570 --> 00:44:05.489

Natalie Bergsma: It essentially locks you out of all of the things that are distractions, so that you can't do that. So I use it when I'm doing deep work time, or when I'm working on specific tasks. It was built for college students, because currently college students for the most distractible people on the planet with technology. That is.

188

00:44:05.520 --> 00:44:17.769



Adam Cmejla, CFP®: that is meant to sap all of their attention away from everything else that actually matters. I know so shocking. But, Clark, here's what I'm gonna ask of you. I want you to find someone else in this room.

189

00:44:18.270 --> 00:44:38.470

Natalie Bergsma: and I want you to pull them as your accountability partner, hey? I'm only gonna check email twice a day. I'm not gonna put this in place right. This is a conversation around accountability. So what's it gonna take for you to hold yourself accountable to doing the work that you just said, which is and kind of still added email. And I knew I still need to work on it.

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00:44:39.830 --> 00:44:41.800

Natalie Bergsma: Alright, Adam, let's keep going.

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00:44:43.070 --> 00:45:11.469

Adam Cmejla, CFP®: See? My mind was also going to. What's the penalty if you actually don't do that? What's the extreme accountability? What's the check that you're gonna write? What's the embarrassing moment that you're gonna have to publish for all of us at limitless to see. If you if you break that commitment, but I'll let you determine if and to what extent you wanna tack that onto the on on to the initiative.

192

00:45:11.500 --> 00:45:33.429

Adam Cmejla, CFP®: Well, in Clark hit on this a little bit right? The the daily practice, the success shifter, is meant to be there to support the daily practice of whatever it your whatever it is that you're gonna do to start your day. He mentioned that he enjoys fitness. I'm also enjoying that. I'm actually shifting up what I was doing for fitness, because, candidly, I just got really, really bored with running after basically running my entire life. So

193

00:45:33.460 --> 00:45:53.979

Adam Cmejla, CFP®: I'm changing. I'm embracing a different type of exercise, and and actually spending a little bit more time at the gym. And it's actually, really, really enjoyable. But my point with that is, find something I can't remember the quote, or I remember the quote. I don't know who it's attributed to, but it's something along the lines of the first hour of your morning is the rudder to your day.

194

00:45:54.200 --> 00:46:09.999

Adam Cmejla, CFP®: and how you start each day can have a significant impact and will pay dividends throughout that day. This is one of the reasons why I cannot stand to read the news. I don't read the news. My dad and I were just having this conversation over the weekend because my dad came down to visit

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00:46:10.190 --> 00:46:36.069

Adam Cmejla, CFP®: is like, so what do you think's gonna happen to sole Ukraine Russia thing? And I would just look them as like. I have no clue, because I'm about as uninformed, that is possible as you could possibly be, and I feel a little bit challenged in that, because it's like, okay. On one hand, I should be an informed citizen. But, on the other hand, to what we're talking about here, it's not something that is going to directly impact the result and the positive impact that I can have on those in my life.

196



00:46:36.090 --> 00:47:03.789

Adam Cmejla, CFP®: And so what are the things that I can do, that I can introduce into my morning to my routine that can reduce my stress and anxiety that can improve my mental. Well being that can include or enhance my clarity and decision making. So everybody has their own version of this. How L. Rod wrote this book, The Miracle morning. You don't have to do everything that is in the savers worksheet there, which you can see if you can zoom in. It stands for silence, affirmations, visualizations.

197

00:47:04.020 --> 00:47:15.880

Adam Cmejla, CFP®: reading. Alright. Excuse me. Silence or meditation, affirmations, visualizations, exercise, reading, and then scribing or writing.

198

00:47:15.880 --> 00:47:34.699

Adam Cmejla, CFP®: So there's all kinds of different versions of that my point is to what we've talked about, to what Natalie mentioned, with the success shifter. Use that as the foundation as the scaffolding in which you can build your morning your teams. It doesn't mean that you have to wake up at 4 in the morning. I know that's what Hal and the team at miracle morning. And there's a

199

00:47:34.940 --> 00:47:39.370

Adam Cmejla, CFP®: Facebook group and all these other communities that you can join around Miracle morning where

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00:47:39.380 --> 00:48:01.729

Adam Cmejla, CFP®: you know some of it is. Dare I say that success porn I get up at 3 30 in the morning for my miracle morning. It's like, Go you, you know what I'll see at 8 30. I figure out what works for you build that momentum, know yourself. And and right, what's the best kinda like, what we talk about with clients with an investment strategy. The best investment strategy

201

00:48:01.730 --> 00:48:22.920

Adam Cmejla, CFP®: is one that you can stick with. The best morning routine is the one that you can stick with. Now, if you have to move it up early. Hal has whole type of systems where you can start at 7 and start moving it back to get more and more car, whatever that time is. But my point with this is, start somewhere and build consistency. You know, oftentimes.

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00:48:23.070 --> 00:48:30.750

Adam Cmejla, CFP®: And Clark mentioned this when he was talking about. You know this, this business allows us the freedom and and the flexibility to spend time with our kids and

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00:48:30.780 --> 00:48:52.699

Adam Cmejla, CFP®: go for walks with our spouse at 10'clock in the afternoon. If we have a break in between appointments, or whatever that might be. The interesting thing about that though, is that if we take that to the extreme, we actually lose all structure. And now we actually introduce more stress into our life, which, like paradoxically, is the one thing that we thought we were solving for by having that flexibility

204

00:48:52.700 --> 00:49:14.290

Adam Cmejla, CFP®: Jocko Willick on or the the author of extreme Leadership, talks about in his course, the or in. He talks about a lot in this, podcast this idea, that the more disciplined you are, the more



freedom. You actually end up having. And this is one example of having discipline in your life and starting out as early or starting out your day the right way.

205

00:49:14.900 --> 00:49:31.380

Adam Cmejla, CFP®: Oops. Anybody wanna share any success stories that they have about starting their morning routine? Have you anybody embrace the true miracle morning approach? Or have you created or customize your own personal version of that. Anybody want to share anything that's worked for them?

206

00:49:34.890 --> 00:49:38.000

Eric Walters: Oh, sure, this is Eric passers, Eric.

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00:49:38.260 --> 00:50:02.680

Eric Walters: Hey? One of the ways I use. The success shift here was around mindsets, and so I didn't adopt everything in the miracle warning. But, you know, affirmations, you know. Kind of personal prayer reading stuff like that. That was a really meaningful way to use the shifter. I know we're focused on, you know, kind of the more business applications. But for me to get my head right was a huge, positive move for the success shifter.

208

00:50:03.450 --> 00:50:07.329

Eric Walters: very cool, very cool thanks for chairman. Appreciate that.

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00:50:08.100 --> 00:50:25.789

Julie Betoni: And I have the the we I started doing it after limitless started. So before you guys even mentioned it, I have a I work with a personal coach to help me implement. So what we're doing here and she does a she actually did a class. So she did it, and it stayed. Takes a month to really implement a habit.

210

00:50:25.850 --> 00:50:30.610

Julie Betoni: So we would. It was a month long class. We would tackle one part of the miracle morning.

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00:50:30.780 --> 00:50:47.200

Julie Betoni: so that you were layering. And it was. It was so helpful because you could read the book. You can have all these tools, but I think the accountability of having other individuals keeping you accountable. And what worked for you, what didn't, and kind of tweaking along the way was so helpful, and it's I've stuck with it ever since.

212

00:50:47.440 --> 00:50:48.749

Julie Betoni: It's been

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00:50:48.940 --> 00:50:57.970

Julie Betoni: totally changed. My mornings people have noticed, I mean, my husband's noticed that, like your outlook changes, you're more productive. And it's really, really been beneficial.

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00:50:58.680 --> 00:51:23.649

Natalie Bergsma: Yeah, I think the the trick there is really making sure that it works for you. Everyone is

different here, right? I'm not a you have to wake up at 5 Am. Every day kind of person. I wake up between 6, 30 and 7. I get up with my kids. Most people don't recommend that or do that. But I get up with my kids. We have breakfast, we get ready for school. We drive them to school together, I come back, and then I have my own out

215

00:51:23.650 --> 00:51:43.139

Natalie Bergsma: where I do my yoga, I do my journaling. I set my day and my intentions, and then I have my meeting with my team, and then I get ready right. I like to stay up a little bit later, so I'm not waking up before o'clock in the morning. Never have, never will. Don't want to, but I do have a routine in a structure that works for me. So right.

216

00:51:43.470 --> 00:51:57.949

Natalie Bergsma: I had to start with 2 min like, that's what it took like. Okay, I'm gonna do 2 min of this one thing every single day. Right? Start small. If you're not sure if you can do it, pick one thing, do that.

217

00:51:57.960 --> 00:52:04.490

Natalie Bergsma: and then to your point layer, add the next thing. Add the next thing you know, get on and and do that.

218

00:52:07.640 --> 00:52:15.940

Adam Cmejla, CFP®: Yeah, I'm just well, you know what I was. Gonna type it out. I'll just say it. There's a reason that the subtitle of atomic habits is I

219

00:52:15.950 --> 00:52:19.639

Adam Cmejla, CFP®: I think it is a tiny improvements, remarkable results.

220

00:52:20.600 --> 00:52:30.740

Adam Cmejla, CFP®: It doesn't mean printing off the success shifter, and putting 23 items on there and trying to accomplish the perfect streak for all 23 right out of the gate. I mean

221

00:52:30.810 --> 00:52:42.249

Adam Cmejla, CFP®: there is, say, nothing could possibly set you up for failure more than trying to do something like that. The other side of that that can be harder for some people myself, I'm putting myself in this category, is

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00:52:42.780 --> 00:52:50.869

Adam Cmejla, CFP®: believing in the system enough to know that consistency compounds, and I struggle with the idea of

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00:52:51.040 --> 00:52:52.760

Adam Cmejla, CFP®: Natalie. Il just

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00:52:52.800 --> 00:53:10.209

Adam Cmejla, CFP®: I don't get out of bed unless it's for more than 2 min like I can't Il can't justify success being hey? Let me just start with 2 min like for me, I and I'm I'm admitting, like, this is my



problem. This is the way my mind works. I have to recognize that I have to catch how I'm interpreting that

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00:53:10.210 --> 00:53:30.939

Adam Cmejla, CFP®: and then reframe it and say, no, this is how habits build. This is, how consistency compounds is, it starts with something relatively easy, like 2 min, and then it goes to 3, and then it goes to 5, or whatever whatever you are measuring to success. Right? It doesn't mean that you have to pound all the savers right out of the way every single morning from the time that you start.

226

00:53:30.940 --> 00:53:46.160

Adam Cmejla, CFP®: how about? We just start with the affirmations and visualizations, and then maybe we use into meditating for a 1 min, 2 min, 3 min, and ease into that. That is my, I have to catch myself on that to what John Srac talks about inner size when we talk about neuroplasticity.

227

00:53:46.160 --> 00:53:47.100

Adam Cmejla, CFP®: which is

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00:53:47.330 --> 00:54:06.829

Adam Cmejla, CFP®: the Aia, being aware of how I'm thinking about something, all right. Well, what is my intention? Well, my intention is to fill in a blank. What action am I gonna take as a result of that? If we just blindly go through that, don't catch how we're, you know, thinking about our thinking. That's that's where progress kind of gets

229

00:54:07.120 --> 00:54:09.570

Adam Cmejla, CFP®: stumped, or just

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00:54:09.740 --> 00:54:29.079

Natalie Bergsma: yeah, all or nothing great. Right? Lean into who you are and how you show up

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00:54:29.170 --> 00:54:34.199

Natalie Bergsma: best, but those are. I think, some of the as we talk about this. What are some of the tips and tricks

232

00:54:34.230 --> 00:54:42.680

Natalie Bergsma: that we have? Right? So stacking is another one. Right. Pick the habit that you want to build and stack it on top of something you already do

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00:54:42.780 --> 00:54:45.629

Natalie Bergsma: every day. So I just got a walking pad.

234

00:54:45.660 --> 00:54:57.150

Natalie Bergsma: I have my meetings with my team. Guess what I'm gonna be doing going forward like anytime. I'm on a meeting with the team. I'm gonna be on that walking pad, because, frankly, like I've noticed sitting at a desk every day.



235

00:54:57.590 --> 00:54:59.059

Natalie Bergsma: I don't feel great

236

00:54:59.070 --> 00:55:27.909

Natalie Bergsma: doing it right. It's not, you know, helping me get to where I want to go. So now I've gotta create some habits and actions that show up consistently to get me there, so you can all hold me accountable check in. See if I've been doing my walk with the team. Someday I'll get to doing them on these calls on my face in the middle of the webinar. So we're not gonna do that. But we are gonna talk about this month's homework assignments or March assignments

237

00:55:28.060 --> 00:55:40.360

Natalie Bergsma: for those of you have resistance to homework. They're just assignments, do them? They're gonna help you, I promise right. Number one is your success shifter. If you're not already doing that. Just trust me.

238

00:55:40.450 --> 00:55:41.909

Natalie Bergsma: try it for a week.

239

00:55:43.310 --> 00:55:46.610

Natalie Bergsma: print it out, pick 2 things, put it on your desk.

240

00:55:47.070 --> 00:55:49.570

Natalie Bergsma: do it for a week, then tell me I'm wrong.

241

00:55:50.030 --> 00:56:02.159

Natalie Bergsma: The second is the Kpi worksheet. If you're not measuring the performance indicators of your business, then you're not running a business. This is what separates.

242

00:56:03.340 --> 00:56:13.320

Natalie Bergsma: I want to say the men from the boys. But I feel like I can't say that anymore. Accidental versus purposeful. Yeah. Accidental versus purposeful for me. It's about.

243

00:56:13.660 --> 00:56:18.049

Natalie Bergsma: So many people start businesses and their entrepreneurs.

244

00:56:18.080 --> 00:56:46.769

Natalie Bergsma: and they're sort of just showing up. And they get what comes after. These are the kinds of things that shift you from accidental prom entrepreneur to on purpose. Business owner. These are the things that you see larger organizations doing. Can you imagine running a fortune 500 company without looking at your numbers and your metrics. Can you imagine running a business without knowing what your profit margin is, or what your client base looks like, or how profitable it is.

245

00:56:46.790 --> 00:57:01.089

Natalie Bergsma: Absolutely not right. So sometimes we tell ourselves, Hey, it's just me. I'm like no solo



practitioner or real small office like, I don't know if we really need to do those things. If you want to grow and scale a successful business.

246

00:57:01.290 --> 00:57:03.349

Natalie Bergsma: Yes, you need to do that.

247

00:57:03.730 --> 00:57:17.510

Natalie Bergsma: and number 3 set up a daily practice. Read the miracle morning, pick a couple of things to do to start your intention for the day. So 3 simple, not super time, consuming no excuses, homework assignments

248

00:57:18.900 --> 00:57:21.100

Natalie Bergsma: y'all jazzed up. Woo-hoo!

249

00:57:23.130 --> 00:57:31.629

Adam Cmejla, CFP®: The only the only tweak that I would say on the success shifter. And this is it.

250

00:57:31.780 --> 00:57:49.470

Adam Cmejla, CFP®: Know yourself. And Natalie touched on this earlier again, I am also a believer in paper. There's something different that happens when we are actually writing something down, or checking something off as opposed, just tapping something on a screen. I don't know what it is. Maybe it's just me. I don't think it is, but there is something different.

251

00:57:49.490 --> 00:57:55.060

Adam Cmejla, CFP®: If you are one that has travel either for work and or personal side.

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00:57:55.200 --> 00:58:16.700

Adam Cmejla, CFP®: It's one more thing to have to pack. That's why I love. I do. I love my James clear notebook, and I just actually finish this one. So I keep both of mine because I'm transitioning from one to the other. So I love bringing my journal with me, my James clear journal with me, because again, everything is right there in the in the journal, including the version of the success shifter. So

253

00:58:16.760 --> 00:58:32.170

Adam Cmejla, CFP®: back to what Natalie had mentioned. Find what works for you build Bill, introduce these systems into the flow of your existing life. Try and reduce the amount of resistance points that you're gonna have for these systems. Give yourself every angle to win rather than just

254

00:58:32.330 --> 00:58:36.449

Adam Cmejla, CFP®: swimming upstream, swimming upstream on multiple different levels.

255

00:58:36.580 --> 00:58:40.559

Adam Cmejla, CFP®: all right.

256

00:58:40.610 --> 00:58:45.279



Adam Cmejla, CFP®: any questions thus far before we

257

00:58:45.310 --> 00:58:48.130

Adam Cmejla, CFP®: shift into breakouts.

258

00:58:54.510 --> 00:58:56.590

Adam Cmejla, CFP®: Bueller, Bueller

259

00:58:59.330 --> 00:59:12.979

Adam Cmejla, CFP®: alright. So what we're gonna do is we are going to be let's see, Natalie, what time we're going here until the bottom we have 90 min for today's call. Correct.

260

00:59:13.240 --> 00:59:17.579

Natalie Bergsma: Okay? But technical questions are, Allison. I'm really bad at math in my head.

261

00:59:17.840 --> 00:59:28.970

Adam Cmejla, CFP®: So we have 40 min, 39 min, according to my clock right now. So why don't we do this, Natalie? What, Alison, if we can

262

00:59:29.050 --> 00:59:37.500

Adam Cmejla, CFP®: say 20 min, do 20 min for breakouts, and then 20 min for QA. That should wrap us up to be any type of Q&A, or follow up.

263

00:59:38.400 --> 00:59:40.770

Allison Foulk: okay, yeah, that sounds great.

264

00:59:41.650 --> 00:59:58.989

Adam Cmejla, CFP®: So we're gonna Yup. Well, Alison, setting up those groups again, all we want you to do is have that discussion create some account. And and with this, if you're with the group that you have. There is nothing stopping you from introducing some peer to peer accountability

265

00:59:59.100 --> 01:00:05.480

Adam Cmejla, CFP®: and saying, Okay, here's here's where I'm struggling. Here's the resistance points that I'm feeling right now?

266

01:00:05.800 --> 01:00:08.609

Adam Cmejla, CFP®: How can I hold myself accountable, or

267

01:00:08.760 --> 01:00:19.330

Adam Cmejla, CFP®: can they help hold you accountable? I know there are people that do these buddy systems to start miracle. Miracle! Miracle! I almost said. Miracle on Hudson. Miracle morning.

268

01:00:19.350 --> 01:00:35.740



Adam Cmejla, CFP®: hey? It's a quick text every morning. Picture of the watch to show. Hey? I'm up. I'm doing my thing. I don't. There's all kinds of different examples of that. If you want to do that, the groups that we're gonna break you out into could be a great opportunity to create that additional external accountability system outside of what we're doing here.

349

01:18:24.990 --> 01:18:26.670

Adam Cmejla, CFP®: Welcome back!

350

01:18:37.850 --> 01:18:49.570

Adam Cmejla, CFP®: Well, no point in me sharing the last slide, because it just says QA. In discussion. So there's really nothing it's better to look at bigger tiles of people than it is to. Look at a screen that just says QA. So

351

01:18:50.710 --> 01:18:53.660

Adam Cmejla, CFP®: hopefully, that was a good discussion, any

352

01:18:53.790 --> 01:19:05.690

Adam Cmejla, CFP®: points of feedback questions or success stories that anybody wants to share, based off either the part that we presented on Prior that presented that we talked about earlier, or discussions from your small groups.

353

01:19:05.760 --> 01:19:11.039

Natalie Bergsma: They're still. They're still coming back. Adams

354

01:19:11.500 --> 01:19:40.200

Natalie Bergsma: Epiphany moment

355

01:19:40.200 --> 01:19:49.910

Adam Cmejla, CFP®: change their world, Natalie, and 1219 alright. Who wants to share? I saw raised or raised hand, but it it moves so quickly

356

01:19:56.040 --> 01:20:05.689

Adam Cmejla, CFP®: was that just someone adjusting your glasses, I guess, or you know, brushing their hair back, or whatever my.

357

01:20:05.700 --> 01:20:16.539

Kevin Murray: we got, have a new member this year. Who is. you know, going through the struggles that we all do. Just try how to

358

01:20:16.600 --> 01:20:26.559

Kevin Murray: where it even began and how to get. You know the ball rolling and part of it is in like, I think it's sort of a newer firm that there's just some.

359

01:20:27.230 --> 01:20:38.529



Kevin Murray: not ever. No one else really embraces what she's trying to do and so I didn't get chance to finish what I was gonna tell her is to

360

01:20:38.940 --> 01:20:41.759

Kevin Murray: you know, maybe try to find that

361

01:20:41.820 --> 01:20:42.960

Kevin Murray: one

362

01:20:43.610 --> 01:20:50.559

Kevin Murray: key element that you all do, briam, not everything, but find that one spot, and then try to start building

363

01:20:50.610 --> 01:20:55.030

Kevin Murray: off of that rather than trying to get agreement across the board. Find that one

364

01:20:55.060 --> 01:20:57.540

Kevin Murray: one area, and

365

01:20:58.080 --> 01:21:05.120

Kevin Murray: you know, Spike, out from there up with all of this great stuff. If that makes sense.

366

01:21:07.750 --> 01:21:09.850

Adam Cmejla, CFP®: It's so important to build momentum

367

01:21:10.270 --> 01:21:15.480

Adam Cmejla, CFP®: on something. Just have just just have a victory in something. Then

368

01:21:15.790 --> 01:21:19.369

Adam Cmejla, CFP®: trying to make progress on 13 different things all at once. So

369

01:21:22.420 --> 01:21:24.699

yeah, well, it's also interesting, because I think

370

01:21:25.360 --> 01:21:37.470

Natalie Bergsma: we all think that like momentum should happen immediately. But that's like the exact opposite from a scientific perspective. How momentum work it builds like

371

01:21:37.710 --> 01:21:54.989

Natalie Bergsma: a little bit over time, over time, like you have a train, and you start to speed up and you speed up and you speed up, and then you get so fast and going for so long that you can't stop right? So it's about those incremental changes building up, picking up pace, picking up speed, picking up



372

01:21:55.070 --> 01:22:23.410

Natalie Bergsma: the successes. And I think Kevin, focusing on the wins, is so critical because there are things that I call momentum killers right? When I focus on Adam and I were just having this conversation, not hitting certain metrics because I grew up in a if you do good if you perform. If you're perfect, you are loved and valued, and you know, get straight plus A's. And then you're good human being, love you

373

01:22:23.410 --> 01:22:33.940

Natalie Bergsma: that I have resistance to that. So when I anytime I like don't hit the metrics like I'm a little bit too hard on myself. I pick up the stick. I pick up the sword, and I'm like, Oh.

374

01:22:33.940 --> 01:22:58.909

Natalie Bergsma: I shouldn't be doing this anyway. Right? So for me, I've had to focus on something different, the experience, the joy, the fun, and that's something that I measure in addition to the traditional metrics. So when I'm working with clients particularly working with like purpose or values based firms. Some of the things that we put in place, or what I call impact metrics. What are the things that are like aligned with your purpose and your values.

375

01:22:58.910 --> 01:23:06.669

Natalie Bergsma: They're gonna keep you motivated and going and growing right. So kind of keeping keeping your momentum is really critical.

376

01:23:07.360 --> 01:23:26.129

Adam Cmejla, CFP®: Well, and that prompted me to think of my favorite quote from the movie Dodgeball, which if Y, if we have all seen that movie there is a great quote that I think it's a great quote court in the beginning of the movie where Vince Vaughn, who, I think, plays Peter. I can't think of his Peter the Flu, or the owner of the gym

377

01:23:26.130 --> 01:23:38.300

Adam Cmejla, CFP®: talking. They're talking about goal setting and setting goals. And Peter's quote is, I found that if you have a goal that you might not reach it. But if you don't have one, then you are never disappointed, and I gotta tell you. It feels phenomenal

378

01:23:38.390 --> 01:23:57.739

Adam Cmejla, CFP®: to which the auditor that's interviewing him says, well, I guess that makes sense in a really sad way. So there is a time for goals, and there is a time for, interestingly enough, doing what feels really good. Assuming that the thing that we're doing really, that what we're doing feels really

379

01:23:57.740 --> 01:24:10.380

Adam Cmejla, CFP®: assuming that the thing that we're doing that feels really good is actually good for us like me drinking a bottle of Bourbon today, it might feel really good. But that's not healthy for us. That's not the good type of input or impact that we'd wanna make

380

01:24:10.380 --> 01:24:22.789

Adam Cmejla, CFP®: There. There are certain things that we can to Natalie's point have more of an impact measurement done that we're not quantifying our progress in incidentally and ironically enough, sometimes doing that



381

01:24:22.910 --> 01:24:25.739

Adam Cmejla, CFP®: can yield some pretty incredible results.

382

01:24:25.780 --> 01:24:28.750

Natalie Bergsma: Yeah, one of my metrics is, Did I have fun today?

383

01:24:30.170 --> 01:24:35.760

Adam Cmejla, CFP®: Today is a yes. By the way, this is fun. I love you guys who else wants to share

384

01:24:42.640 --> 01:24:52.149

Adam Cmejla, CFP®: any interesting goals that people wanna share that they're putting down on their paper or success shifters. Maybe I shouldn't call them goals just shifts that they're putting down on their paper. That

385

01:24:52.220 --> 01:24:56.570

Adam Cmejla, CFP®: is something that is important to them, qualitatively or quantitatively, that they want to share

386

01:25:01.590 --> 01:25:03.380

Adam Cmejla, CFP®: lively bunch today, Natalie.

387

01:25:03.470 --> 01:25:16.270

Natalie Bergsma: I know. Well, maybe it's because we keep positioning it as wants to share who's willing to step up and have an opportunity to have the group hold them accountable to something really amazing. Going forward.

388

01:25:16.710 --> 01:25:27.549

Steven Fronrath: I would say, I'll I'll jump in. It's not necessarily a particular shift that I wanted to share. But I was telling the group that I'm in. I've been a big digital guy my whole life, and just

389

01:25:27.750 --> 01:25:56.059

Steven Fronrath: Adam, what you said earlier of. I think it was Matt Jarvis that was talking about the the if I were the purple underwear that was kind of me with the success shifter when Stephanie was talking about it last month. That was like, you know. Let me just print this out. Let me forego the have a tracking app, and for me it's been a game changer. I'm just hamming it out on the the kitchen counter every single day, and at the end of the day I can't ignore. It's right there in my face, and there's just a a ton of satisfaction of

390

01:25:56.100 --> 01:26:15.290

Steven Fronrath: taking the pen out and just marking the big apps. If they did it or not, and it's been a big shift from just tapping the little button on the app and then going woo, hoo! That's over, and it. It's been a big one for me. So I encourage anybody else. That's been a really big digital person. Just give it a shot. There's a reason they don't do it.



391

01:26:18.960 --> 01:26:31.419

Natalie Bergsma: That there's a question from Debbie which I think is a really good one. How do you? How do you measure something like, did you have fun today? Sometimes when we set experiential or qualitative goals.

392

01:26:31.580 --> 01:26:35.299

Natalie Bergsma: they can be harder for our brains to measure

393

01:26:35.490 --> 01:26:49.059

Natalie Bergsma: right. How do I measure if I had fun. How do I measure? If I had a positive mindset today? Right? So find something that works for you, for me. It's a hell, yes, or hell. No.

394

01:26:50.050 --> 01:27:02.899

Natalie Bergsma: right? It's either a yes or no. If it's in between, I gotta pick which one it falls into the camp. One of the other things I use. I do use an app to track my moods and my emotions.

395

01:27:02.940 --> 01:27:32.189

Natalie Bergsma: I forget the name of it, but I'll I'll pull it up and share it with you guys. It's actually, I think, Harvard or Nyu. It's a read. They're using it for research. But it allows you to track your moods and your emotions throughout the day, and it kind of gives you a score uses a system which I think is funny because I learned it teaching it to my children, which is what color are you right now? Are you red, yellow, green, or blue? And for me that has been really instrumental in

396

01:27:32.330 --> 01:27:58.060

Natalie Bergsma: managing the anxiety I have as an entrepreneur and mother, and kind of understanding like how I'm actually showing up, and how my thoughts are impacting my feelings, which are impacting my actions. So for me that emotional awareness has become really critical in creating shifts. So much of my roadblocks are not like process or system oriented. I can tell you how to build.

397

01:27:58.460 --> 01:28:21.999

Natalie Bergsma: Look at the processes that we teach you about. And yet I'm a human, too, and they're ones that I struggle with in my business, that I'm working to create improvements. And and those are the ones that I spend a lot of time talking to my coach about, and she's not a business coach. She's a mindset coach. That's really all that we talk about is what are the things that I'm thinking, the feelings? How is that stopping me

398

01:28:22.000 --> 01:28:31.350

Natalie Bergsma: from getting where I'm going? So those are some of the ways that that I track those more qualitative metrics, but just pick something and then do it consistently.

399

01:28:31.450 --> 01:28:45.090

Natalie Bergsma: That's the answer, right? I have a lot of advisors when we talk about Kpi. So like. What do I put for my salary? Because well, I'm an Llc. And I'm a disregarded entity. So I pass through all my compensation. I'm like great.

400



01:28:45.440 --> 01:28:53.690

Natalie Bergsma: Let's pick how you want to measure it, and then measure it consistently going forward. My recommendation on that is, if you're building out. Kpis is set

401

01:28:53.730 --> 01:29:04.980

Natalie Bergsma: a salary for yourself, even if you don't take it from like a tax and accounting perspective like, Hey, I'm running my numbers an equivalent to replace me in this organization would cost at.

402

01:29:05.390 --> 01:29:19.590

Natalie Bergsma: And then, when I, running my excel spreadsheet metrics, hey, I can put those numbers in, and I can actually see how that drops or changes the bottom line. The great thing about that is, I also know what it takes to replace me in the future.

403

01:29:19.710 --> 01:29:44.569

Natalie Bergsma: And that came about. I used to do some valuation work when I was at asset Mark, and if you're going to sell your firm, guess what they're going to normalize your Pnl and take out all your personal expenses. And they're gonna say, Hey, this is what it costs. Replacing the organization. It's also a pay yourself first mentality, I think, particularly for those of you who are starting out early or newer advisors. Right? Sort of that. Take what's left over

404

01:29:44.570 --> 01:29:51.590

Natalie Bergsma: mentality. There's a big shift between taking what's left over and valuing your worth

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01:29:51.660 --> 01:29:57.749

Natalie Bergsma: and your role in the business. And even if you're not kind of measuring it, you know.

406

01:29:57.750 --> 01:30:22.009

Natalie Bergsma: tactically speaking, with your tax accountant. Putting it on the metrics and saying, Hey, here's here's what I would like to pay myself this year. What are my numbers actually look like if I raise, give myself a raise from \$125,000 to \$165,000, because that's what a senior wealth advisor is worth, and darn well, that's what I should be paid. And then it's gonna tell you, hey, what are the shifts that I need to make

407

01:30:22.080 --> 01:30:28.930

Natalie Bergsma: to get there. Hey? To do that I need to make X more in revenue. Great. Now, what do I need to go do to go make that happen

408

01:30:30.150 --> 01:30:48.400

Julie Betoni: Natalie. I was gonna touch on that. And then what? Adam was asking one of the things that we talked about in our group, which I it was a good reminder. Is that how do you come up with your niche? And it talks to it comes into the qualitative metrics. Because one of my top things that I determine of of my niche is, do I get excited when the somebody calls my

409

01:30:48.440 --> 01:30:59.449

Julie Betoni: call to phone. Do I want to answer their question because it's interesting it, you know, it's gonna challenge me. And do I like the person my largest client? I got rid of last year.



410

01:30:59.660 --> 01:31:15.030

Julie Betoni: It was incredibly painful, but having her call, and that was a metric for me to measure. Do I just immediately cringe, get annoyed and spend a half hour just venting soon as I hang up the phone with her. And just having to do this because I just like

411

01:31:15.030 --> 01:31:31.590

Julie Betoni: was so aggravated. That was a complete waste of my time, because it was such a snowball that just destroyed my energy, and it just had to look at it and go. That makes no sense. She is keeping me from getting good revenue. I don't care on what she's making. She doesn't appreciate the value she doesn't. You know all the metrics that we look at.

412

01:31:31.590 --> 01:31:36.770

Julie Betoni: and as painful as it was to to step back from that client. I also.

413

01:31:37.930 --> 01:32:07.080

Julie Betoni: I guess I appreciate limitless, and that you guys showed me, as Stephanie says, I was not going to get eaten by tiger. I'm still here, even though I lost 100,000 of revenue. She was a big client. That, yeah, but so much happier now that she's gone. Now, is it? Are we having to go back and make up that revenue, but by seeing, like Adam, you go in niche and become very successful by nitcking. She not only didn't fit in my niche from the. You know she's not an executive anymore, but

414

01:32:07.750 --> 01:32:27.810

Julie Betoni: I just didn't like her as a person. I mean, it sounds horrible. And so I'm excited now by doing all the things that limitless is teaching, that I'm gonna not only replace that revenue, I'm gonna replace it with people that value my work that appreciate me as a person, and that I'm gonna get excited to pick up the phone and want to work with. But

415

01:32:27.840 --> 01:32:55.369

Julie Betoni: it was great to have the examples like Adam when you did that you had some bumpy roads just like I went through, but you made it. You made it to the other side. And here's some of the great tools and tips and tricks that made you'd be able to get through. And I loved having that first year of limitless just being a sponge. And then, now we're actually implementing. So it's funny. When Kenneth asked the question, but how did you pick your niche? And I was able to just ride off to that. I like them. They're interesting, and they pay me, and I couldn't have done that in the first year of limitless.

416

01:32:55.570 --> 01:33:00.849

Adam Cmejla, CFP®: Hmm. awesome. Thank you for sharing. That's congratulations. That's a big number 100. Grand.

417

01:33:00.870 --> 01:33:06.010

Natalie Bergsma: It's very painful. Bever. Yeah. Well, yeah, I think here's the interesting piece.

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01:33:06.100 --> 01:33:11.380

Natalie Bergsma: If you're showing up and expecting nothing to be effort.



419

01:33:12.250 --> 01:33:14.810

Natalie Bergsma: or that this isn't gonna test you.

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01:33:14.970 --> 01:33:22.639

Natalie Bergsma: That's why we're talking about creating and putting accountability systems in place because you are going to meet

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01:33:22.690 --> 01:33:28.110

Natalie Bergsma: resistance. There are going to be things that you know you need to do.

422

01:33:28.290 --> 01:33:44.539

Natalie Bergsma: but you don't necessarily want to do right. I know I need to let go of a hundred \$1,000 client who side rails. My day makes me feel bad, you know, loses all of the momentum, and is really draining me of energy and purpose.

423

01:33:44.900 --> 01:33:52.700

Natalie Bergsma: Right? But do I want a Lego of a hundred \$1,000 in revenue? Probably not right probably don't want to do that.

424

01:33:52.830 --> 01:34:13.280

Natalie Bergsma: But right having that right, being able to shift that mindset from scarcity, I'm losing \$100,000 in revenue to abundance. Hey? I'm creating space and energy and time to be able to reach my goals. And while this thing that I'm choosing to do is hard.

425

01:34:13.900 --> 01:34:19.210

Natalie Bergsma: it's going to help the boat row faster. It's going to get me where I want to go

426

01:34:19.330 --> 01:34:34.120

Natalie Bergsma: faster. And so that's really why the accountability mechanisms are so important because you're gonna be face. The more successful you are, the more you're gonna be faced with things that I call testing your metal

427

01:34:34.560 --> 01:34:39.119

Natalie Bergsma: right. Having to say no setting boundaries.

428

01:34:39.140 --> 01:34:47.139

Natalie Bergsma: choosing only to work with a certain kind of client because it's going to get you where you want to go faster, and because you. Thank thank you. You enjoy

429

01:34:47.300 --> 01:34:48.560

Natalie Bergsma: doing it

430

01:34:48.970 --> 01:35:05.290



Natalie Bergsma: right. Those are all the things. But if you don't have a structure in place to support you, you're just less likely to show up and set boundaries and say no, and do all of the things that we know are going to get us where we want

431

01:35:05.470 --> 01:35:06.280

Natalie Bergsma: to go

432

01:35:07.610 --> 01:35:12.509

Natalie Bergsma: any other questions as we wrap up we got time, probably for about one more. I think, Adam.

433

01:35:16.230 --> 01:35:18.349

Natalie Bergsma: this is your last chance.

434

01:35:22.800 --> 01:35:24.190

Roshani Pandey | True Root Financial: I have a question.

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01:35:24.300 --> 01:35:42.369

Roshani Pandey | True Root Financial: so when you think about you know, close percentage when you're tracking the close percentage, are you tracking close percentage? You know, like closings as a percentage of the, you know all the people that book a call with you? Or are you tracking that as a percentage of

436

01:35:42.450 --> 01:35:57.169

Roshani Pandey | True Root Financial: you know people who are the right fit, who potentially would want an advisor like you? Is it? Is it that close of a fit? Because I get so many random, random, like calendly prospect calls from people who are not even the right fit for me.

437

01:35:57.440 --> 01:36:00.109

Roshani Pandey | True Root Financial: and I know they're not gonna turn into clients. So

438

01:36:00.600 --> 01:36:19.880

Adam Cmejla, CFP®: yep, so I'll read and and I'll read the response, and I just hit. Enter on it. I'll put some some some context behind that. So this is going the the original question is, what were the 3 kpis that are most important to me that we measure? That if I only had to pick 3 like I would measure those. It's revenue per client, or average revenue per client.

439

01:36:19.880 --> 01:36:33.070

Adam Cmejla, CFP®: Number of free days that I take or or off days. You know what are my out of office days, and then what is my close ratio, which is the number of onboarding calls? So the only way you can do an onboarding call with our firm is you've signed the financial planning engagement and we've got check from you.

440

01:36:33.160 --> 01:36:43.429

Adam Cmejla, CFP®: Period full. Stop 0 client service. 0. Well, let's begin the onboarding process, and



we'll wait until Nope. Then they're done that lost my T-shirt a couple of times. So

441

01:36:43.830 --> 01:37:00.409

Adam Cmejla, CFP®: by measuring in our scheduling software. We can pull those reports and say, Okay, how many onboarding calls that we scheduled. We call it a gold meeting. Get organized and learn. So it's your first meeting with us as a client. How many of those that we scheduled? How many triage calls have I had a triage call as we'll talk about more in the

442

01:37:00.680 --> 01:37:14.949

Adam Cmejla, CFP®: as we get into sessions. The say, yes, prospect process and things like that. That is the first call that essentially, we have as human beings with our prospects. So that triage call that I have

443

01:37:15.030 --> 01:37:18.810

Adam Cmejla, CFP®: is a condensed version of the says prospect process. Again, we'll get into that.

444

01:37:18.920 --> 01:37:43.729

Adam Cmejla, CFP®: We spent a lot of time and energy retooling the website to put language on the website. That is a that makes it abundantly clear to someone that is going to schedule who we do our best work with, and how we qualitatively and quantitatively measure that. So we do that on the website. And then when they book the triage call, we created an intake form, that in order to book the call, you have to answer these questions.

445

01:37:43.730 --> 01:37:54.369

Adam Cmejla, CFP®: and the questions only give options that are in alignment with our ideal prospects. So if you select no to any of those, or you don't answer them because they don't fit

446

01:37:54.750 --> 01:38:04.309

Adam Cmejla, CFP®: that that has self selected out. So the number of triage calls that we did from 2022 to 20, or from 2021 to 2022.

447

01:38:04.880 --> 01:38:26.179

Adam Cmejla, CFP®: I don't remember the exact number, but I believe we cut them down by at least a third, maybe close to 40, and yet our new client numbers stayed the same because I was having that exact issue. I'll never forget the exact there isn't. It was a a month or there was a week in February, because I surge, quote, surge my prospecting calls as well, and I think like one week I had

448

01:38:26.240 --> 01:38:38.080

Adam Cmejla, CFP®: 17 triage calls that were on the books, and I go into that week, and I'm like, Oh, my gosh, this is awesome. I mean, it's been like manner from heaven in new clients coming down like holy smoke! This is amazing!

449

01:38:38.260 --> 01:38:58.999

Adam Cmejla, CFP®: And then, after that and my God, what a colossal waste of time! Because they were so many non fit calls! And that was the tipping point to realize. All right, let's quit masking the symptom. Let's cure to the disease. Let's go back to the drawing board retool the website and do that, and that has worked interestingly, very, very well on avoiding, like we don't.



450

01:38:59.340 --> 01:39:03.790

Adam Cmejla, CFP®: I'm not gonna say we're batting a thousand. I there are some people that get through that

451

01:39:04.070 --> 01:39:11.059

Adam Cmejla, CFP®: dare, I say. intentionally, answer wrong just to get on my calendar

452

01:39:11.280 --> 01:39:31.009

Adam Cmejla, CFP®: pat was part of the reason we also do that, or we've also fixed that Kathy does after within 24 h after booking a call, Kathy makes an outbound call to connect with that person just kind of fish for a little bit more information, if she gets some ideas that it might not, that it might not be the best fit for us, she puts those notes into Crm so that I can kinda go into that conversation

453

01:39:31.130 --> 01:39:39.360

Adam Cmejla, CFP®: somewhat prepared that this might only be a 15 min call instead of the full 45 min, but a long answer to your question. To put some context around it.

454

01:39:39.410 --> 01:39:48.429

Adam Cmejla, CFP®: The majority, if not all, of the triage, calls that I have are already with ideal clients or prospects. Excuse me.

455

01:39:48.430 --> 01:40:11.489

Natalie Bergsma: Yeah. So if you're not yet at that level where the prospects that you have are coming in, or ideal. What Adam is talking about is yes, measure whether or not a prospect who comes through your pipeline is an ideal fit, because what that's gonna tell you is, if you keep getting prospects who aren't ideal fit, it's data and information that tells the story. The story is.

456

01:40:11.490 --> 01:40:19.400

Natalie Bergsma: I'm not go doing a great job, telling the world who I am and what I do, and who I do it for in a way that has them going.

457

01:40:19.400 --> 01:40:39.229

Natalie Bergsma: Oh, that person is for me or isn't for me. So if you aren't already, you know your brand isn't out there in the way that Adams is. It can help you get a sense of like, hey, do I need to do a website or a brand update some point in the future? Right? It's all really valuable data.

458

01:40:39.310 --> 01:41:00.989

Natalie Bergsma: And for those of us who have a bit more values, oriented or not, like a profession oriented niche like, I work with purpose, based advisors, right people who are driven and motivated to do good work in the world, who are human beings and wanna make our industry a better place. You know exactly the easiest thing to measure or share with someone. Right? So I still track

459

01:41:01.200 --> 01:41:11.780

Natalie Bergsma: both right. And sometimes there's what I call old school advisors sneak through. I want



to make a whole bunch of money. But hey, one of the questions I ask in the interview process is,

460

01:41:11.810 --> 01:41:17.470

Natalie Bergsma: tell me about how you pay your team right, hey? If I have someone who's been on my team for 10 years.

461

01:41:17.590 --> 01:41:33.559

Natalie Bergsma: and they're still making what an admin makes. It's a pretty good indication for me that there's not a good fit, or Hey, let me dig into that a little bit deeper. So tracking those things, I think, are really critical, the better that you get at it. The more focus you get. You can start to kind of shift

462

01:41:33.680 --> 01:41:42.869

Natalie Bergsma: the metrics a bit, but absolutely don't just track anyone who comes through the door track, whether or not they were the right person coming through the door.

463

01:41:42.890 --> 01:41:54.070

Natalie Bergsma: And then you can start to include your closing ratio right, your closing ratio should go up for ideal prospects. It should go down, or non ideal prospects.

464

01:41:54.870 --> 01:41:57.009

Natalie Bergsma: In fact, it should be 0,

465

01:41:59.740 --> 01:42:09.360

Adam Cmejla, CFP®: would you say should be 0, Natalie. Sorry I was messaging. Chad. Oh, yeah.

466

01:42:09.610 --> 01:42:32.870

Natalie Bergsma: alright. With that, I think we're gonna call it wrap. If you guys have questions. If you want to share your successes, if you need someone to be accountability partner for you, check out, try and go in. Say, hey, I'm gonna be doing this right. We're here to support you. Everyone in this room is here to support you. Good luck! Go forth and conquer.

