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UPCOMING EVENTS



03.11.2024 **VALUE VIRTUAL SUMMIT**

03.20-03.21 **DELIVERING VALUE WORKSHOPS**

03.21-03.22 **LEADERS VALUE RETREAT**

UPCOMING COACHING CALLS



03.05 **BREAKTHROUGH COURSE**

03.18 **OVERCOMING OVERWHELM**
with Coach Liz

04.01 **CLIENT PROFITABILITY**
with Stephanie & Coach Adam



USE ZOOM Q&A FOR TODAY'S QUESTIONS



CRUSH

YOUR

CLIMB

LIFESTYLE PEAK PRACTICE COACHING CALL: BUILDING ACCOUNTABILITY



ADAM CMEJLA



NATALIE BERGSMA



**CLARIFYING
YOUR VISION**



**CREATING POSITIVE
MINDSET & HABITS**



**BUILDING YOUR
ACCOUNTABILITY
SYSTEMS**

**OUR FOCUS
THIS QUARTER**



Q1 / SUMMIT ACTION PLAN

ELEVATE YOUR EMAIL

SUCCESS SHIFTER

DAILY PRACTICE

One-Page Business Plan
Your Limitless Launch Plan

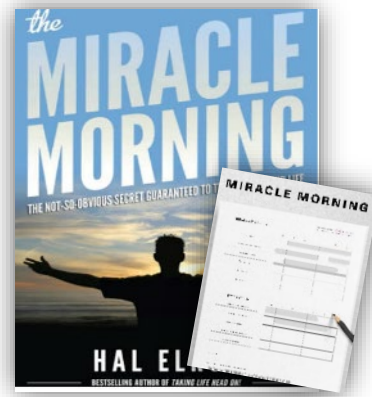
\$1M REVENUE + 100 DAYS OFF

Strategies include: TAKE 60 DAYS OFF, AUTOMATE WORK-FLOWS, and MY BIG WHY.



CLARIFY YOUR VISION

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



MANAGING STEPHANIE'S EMAIL INBOX

Process Overview: Daily Practice: 15 min

ANALYZE THE INBOX PROCESS

KEY

IMPLEMENT

LONG TERM



CREATING POSITIVE MINDSET & HABITS

- Daily Practice
- Email 2x per Day Only
- Delegate Your Email
- Weekly Check-In

Success Shifter

Key Performance Indicators Dashboard

KEY DATA POINTS

Revenue	\$ 1,000,000
Expenses (incl. over budget)	\$ 100,000
Profit	\$ 900,000
Total Revenue/Profit	\$ 900,000

EBDC (Earnings Before Debt Service) Goals \$ 600,000

EBDC (Earnings Before Debt Service) Actual 60%



BUILDING ACCOUNTABILITY SYSTEMS

- Success Shifter
- KPI Worksheet



This Month's Topic

BUILDING ACCOUNTABILITY



PRACTICE KPIs

(KEY PERFORMANCE INDICATORS)



Translates goals into clear performance benchmarks



Measures performance to goals



Helps ensure decisions are aligned with actions



Highlights where adjustments need to be made to achieve goals

Key Performance Indicators Worksheet

Populate highlighted light blue cells with current data. Other cells will calculate based on your inputs.

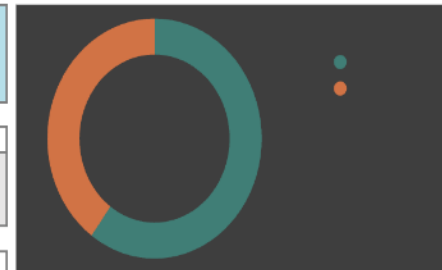
KEY DATA POINTS

Revenue	\$	1,000,000
Expenses (incl. owner wages)	\$	600,000
Profit	\$	400,000
Total Owner Earnings	\$	200,000

Revenue KPI		
Revenue per Client	\$	10,000
Revenue per Professional	\$	500,000
Revenue per Total Head Count	\$	500,000

Expense KPI		
Total # of Clients		100
Total # of Professionals		2
Total # of Non-Professional Staff		2

EBOC (Earnings before Owners Comp)	\$	600,000
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Total # of Clients	100
Total # of Professionals	2
Total # of Non-Professional Staff	2
AUM	\$ 100,000,000

Profit KPI	
Profit per Client	\$ 4,000
Profit per Professional	\$ 200,000
Profit per Total Head Count	\$ 100,000

Client KPI	
Clients per Professional	50
Clients per Total Head Count	50

EBOC (Earnings before Owners Comp)	60%
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Daily Practice



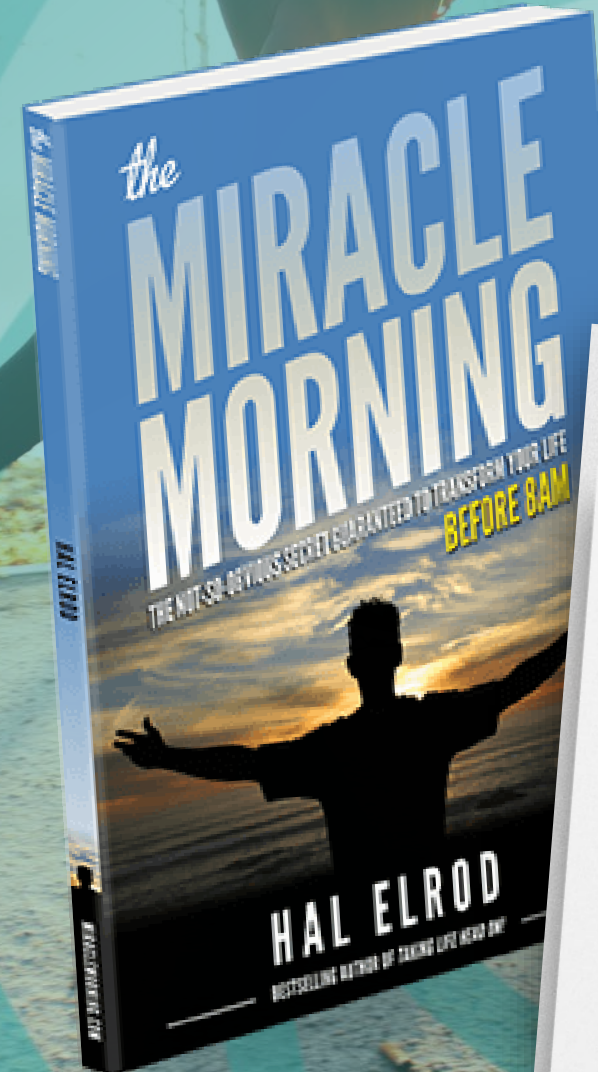
Reduced Stress and Anxiety



Improved Mental Well-being



Enhanced Clarity and Decision-Making



MIRACLE MORNING

MIRACLE MORNING.

JAN / FEB / MAR / APR / MAY / JUN
JUL / AUG / SEP / OCT / NOV / DEC

	M	T	W	T	F	S	S
SILENCE							
AFFIRMATIONS							
VISUALIZATION							
EXERCISE							
READING							
SCRIBING							

MY ROUTINE.

	M	T	W	T	F	S	S
COLD SHOWER							
DRINK WATER							
WAKE A BED							
WRITE A JOURNAL							
READ A BOOK							

NOTES

© WHAT I AM GRATEFUL FOR:
MY FAMILY AND FRIENDS WHO ARE ALWAYS THERE FOR ME.



MARCH ASSIGNMENTS

1

SUCCESS SHIFTER

Success Shifter

Health & Fitness

Professional Goals

Personal Goals

Pipeline Goals

2

KPI WORKSHEET

Key Performance Indicators Worksheet

Populate highlighted blue cells with current data. Other cells will calculate based on your inputs.

KEY DATA POINTS

Revenue	\$ 1,000,000
Expenses (incl. owner wages)	\$ 600,000
Profit	\$ 400,000
Total Owner Earnings	\$ 250,000

Revenue KPI	
Revenue per Client	\$ 100,000
Revenue per Professional	\$ 500,000
Revenue per Total Head Count	\$ 500,000

Expense KPI	
Total # of Clients	100
Total # of Professionals	2
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EBOC (Earnings before Owners Comp)	\$ 600,000
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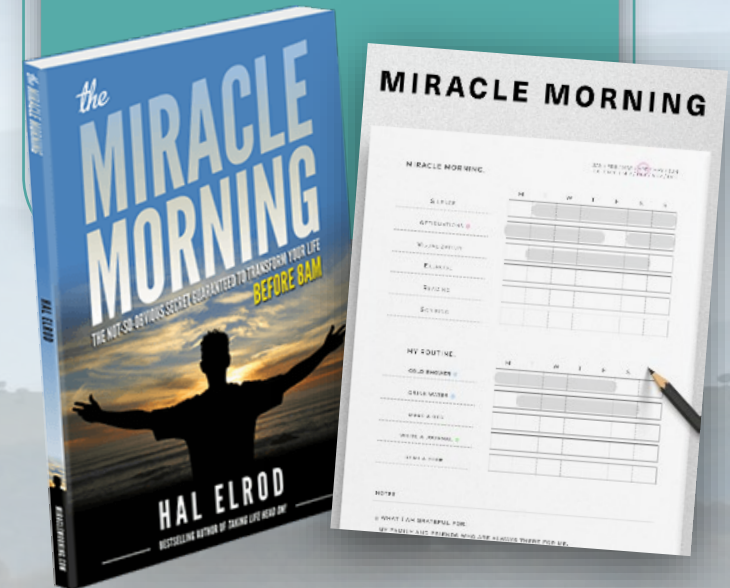
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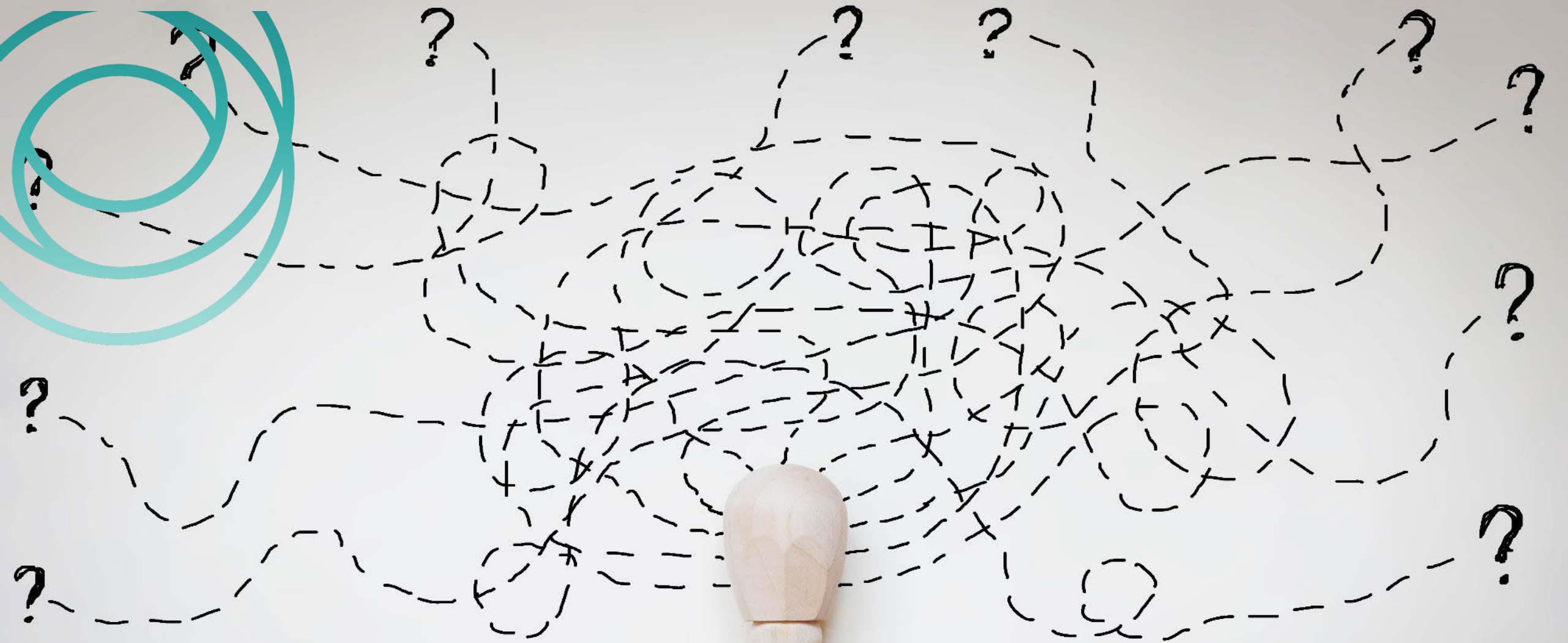
3

DAILY PRACTICE



POST YOUR ASSIGNMENTS ON TRIBE FOR FEEDBACK
NEED HELP? REQUEST FEEDBACK AND/OR SUBMIT FOR OFFICE HOURS





What's your biggest resistance around this month's assignments?

What's standing between you and implementing them?

How will you hold yourself accountable?



Q&A

