

LIMITLESS Coaching Call Transcript

MARCH 25TH, 2024
LEADERS COHORT CALL
ACCOUNTABILITY COHORT

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Stephanie Bogan: Alright. So today's call as we hit April is really to put the finishing touches on Q. One. So that we can really step very clearly and strongly into q. 2. As we make that shift to focusing on delivering deeper value hyper efficiently, which is one of the key tenants of scale.

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Stephanie Bogan: So let's see, I gotta click more here. Alright. So this quarter we focused on clarifying your vision.

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Stephanie Bogan: Right? So we'll talk about that at the end of the call, in terms of what's that 3 year vision and the business plan right to move the needle. And what those priorities are. 2. How do we create a positive mindset and high performance? Right? What we call that happy high performance. And that's what Jared's gonna talk a little bit about today.

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Stephanie Bogan: And then, third, which is the bookend to vision, right if you will, is productivity and accountability like, how do we actually set plans? But how do we actually then manage performance to that vision and goals so that we can do right? What we always talk about, which is, take aligned action

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00:25:13.440 --> 00:25:17.630

Stephanie Bogan: when the vision is clear. We can really look at each decision that we make.

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Stephanie Bogan: And, Jared, we've been talking a lot about how success you know, kind of on this theme of scaling growth. Success is a lot less about hard work.

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Stephanie Bogan: and to me, in my experience is a lot more about being willing to make the hard decisions right? What? How do we deal with those clients? How do we build the team. Right? Hard work to me is the tax

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Stephanie Bogan: when we don't make aligned decisions, and we have to do the work to make up for it. So



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Stephanie Bogan: as we reflect on this quarter, we've really started to delay those foundations. And from last week you've seen we're really starting to step into starting to build structure that aligns with that strategy. And we don't want to lose sight of the fact that you, as the leader, according to Mckenzie and they're really good at this kind of research. The leader is 76% of an organization's results, performance and success.

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Stephanie Bogan: I would argue that the other 14% is the the other people that you hire. And since you hire them, I'd actually argue that it's a hundred percent

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00:26:14.572 --> 00:26:42.389

Stephanie Bogan: right? But it's who we hire and how they execute outside of us. That is the second part of that equation. And how you show up as a leader is a huge part of that. So getting to that aligned, inspired action plays, for we show up every day, and we're empowered and we're energized and we enjoy what we do not because it's perfect. Every day Jared will tell you, but because the mission calls us forward, the vision calls us forward. The Y is bigger than the what ifs?

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00:26:42.470 --> 00:26:46.349

Stephanie Bogan: And this is really a conversation about how do we put ourselves in the headspace.

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Stephanie Bogan: and really the heart space to show up and harness all of our our teams and our organization's capacity and potential. So with that, I will turn it over to Jared. Jared, if you, as I share, just wanna give a little bit of the backstory and then we can hop into. I think Jared does a great job of bringing

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Stephanie Bogan: discipline to his organization. You know we love to see. You know these big charismatic right all over the book cover. You know you're all familiar with right. The the big firms and their leaders in the space. And that's great, if that's your personality. But some of the best leaders

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Stephanie Bogan: I've met and worked with are much more what I'll call humble servant leader leaders. They're quieter. They're a little bit more introverted. They actually like data. Right? It's not just all right, shiny things. And Jared to me, really, epitomizes and characteristics characterizes the qualities of a really good servant leader who gets his team invested, who's able to have impact. And then who's ultimately able to do it in a way where the economics actually work as well. So with that, Jared, I will turn it over to you.

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00:27:50.470 --> 00:27:57.095

Jarrod Musick: Well, thanks, Steph. I mean what a what a tea up there! I guess I've got to deliver on being a servant leader here, so.

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Stephanie Bogan: I copy that to your in-laws for you.



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Jarrold Musick: I love it. I love it

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Jarrold Musick: well, hey, everybody really excited to to be here and be back with the limitless crew. You know, as Steph said. We've been involved in, you know, working with her and with limitless in different capacities here for gosh! 5 years, 6 years, and you know one of the the hallmarks of limitless is continuing to reevaluate yourself

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Jarrold Musick: and what you do, and continuing to reevaluate what your business does and what your firm does as well. So, really excited to, you know, share a few things that I found to be really personally successful. A few things that are have been really successful for our firm as well. And then would definitely love to open it up for QA. So don't hesitate to drop stuff into the QA. As we go, and I'll try and get to those as we can. So a little bit about.

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Stephanie Bogan: You guys can probably just drop them into the chat. I'll watch that for Jared. I'll watch that for you.

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Jarrold Musick: Perfect.

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Jarrold Musick: See, I was trying to follow the instruction slide that said, put them in the QA.

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Stephanie Bogan: Oh, yeah, yeah, that's for lifestyle. Because when you have, like 150 people, everyone in the chat for leaders, I should updated it.

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Jarrold Musick: Love it. Love it. So a little bit of background I've been in the wealth, management, financial planning industry since 2,011 I came out of nonprofit work and government performance accounting, which is kind of like business consulting for the public sector and joined my dad. So he had been a financial planner. I grew up with financial planning around the dinner table.

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Jarrold Musick: hearing redacted client stories, talking about all these what I now consider to be really interesting problems, and at the time sounded extraordinarily boring, and that I didn't want to be a part of it all. He still loves to give me a hard time. But

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Jarrold Musick: you know, he had talked to me when I was getting my undergrad degree in economics, and said, Hey, I think you have the temperament and the skill set, and we'll now have the educational



background to do this work. Would you ever want to join the firm, and I said, Dad, don't take this the wrong way, but what you do is pretty boring and he has never, ever let me live that one down? You know, because as I went into my career, I really

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Jarrold Musick: fell in love with the problem, solving nature of what we get to do, and how Multi faceted the work is that we get to do for our clients.

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Jarrold Musick: And that was what really led me to join the firm. In 2011 over the next 6 years I grew into the CEO role and ultimately purchased the majority of the equity of the firm 6 years later, in 2017. If anybody has any multi generational firms like, I know you do, liana they're very interesting, and everyone is unique and special in its own way.

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Jarrold Musick: And so got to spend some great years with my dad working on this together, and ultimately purchased the firm from him, and he finally exited in 2020. So

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Jarrold Musick: During that time we added Tiffany as our chief growth officer, and she came on board in 2018, and that was really this transformational event in the history of the firm, because we went from being a highly leveraged solo practice to a small ensemble where we had a few advisors that were working.

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Jarrold Musick: Really trying to grow this enduring enterprise as we've looked at it. So a much larger firm that's able to do bigger things for more clients and for more people internally. And we've really been working hard on that for the last 6 years.

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Jarrold Musick: So as the firm stands today, we have 13 of us. We're geographically dispersed. So we have 7

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Jarrold Musick: that are here in the State of Colorado. We have 2 that are in Texas, 2 that are in Missouri one that's in New Jersey.

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Jarrold Musick: So I guess we out of that have 8 of us that are here in Colorado. Apparently I can't do basic math lost track of where our team is. So it happens when we just hired somebody about a month ago. So I've gotta adjust my math there. And we really work with clients in 2 different segments. So the first one is the traditional firm that's been here since my dad founded it. So that's destiny capital.

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Jarrold Musick: The problem set that we're solving for for most of our clients is retirement planning. So we're working with clients that are on average 4 to 5 million dollars in that worth a couple of 1 million

dollars of assets. We're doing very, very good work for them. But I would not consider us to be highly differentiated in that brand. We do great work, but it's not not that different from anybody else. We also

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Jarrold Musick: created another brand called entrepreneur, aligned and launched that in 2020 and entrepreneur aligned works with entrepreneurs, with closely held business equity and concentrated equity positions in their businesses where that business is really the center of gravity for their financial life.

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Jarrold Musick: So the work that we're doing is not at all focused on retirement. And that's why we chose to break it out in this Dba and really build it out as an entirely separate brand. So we're helping them with business continuity and exit planning

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Jarrold Musick: legal liability and risk management. All of these different things that most people who work a W. 2 job and ultimately retire don't have to deal with. So we have a fairly complex firm for our size. Given that we have these 2 brands and differentiated service teams and offerings that are serving them. So as we've gone through this learning process and really have continued, what did you call itself to build, break.

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Stephanie Bogan: Break. Yeah, Michael, when we were having one of our calls, he said, oh, I'm just gonna be breaking things on, because I was like we need to do this. And then at this level, when you get to the next 8. And he's like, Oh, so you're basically telling me, I'm just gonna keep breaking things on purpose

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Stephanie Bogan: and different iterations. And so we were talking about it last week, as we were looking at right the growth charts around where the inflection points are. As I'm like, build, break, build, break, build, break, and that's where you see the profit. Mar, right? You see the the profit margin, start to dip down like we broke it a little bit. We hired someone. We're integrating a new tech or a process, or building out a service model and get right. And then back, up it goes. We're just trying to keep those dips

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Stephanie Bogan: a lot narrower and shallower than they are for a lot of firms. A lot of firms will drag out the dip

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Stephanie Bogan: just by compounding poor decision, making honestly.

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Jarrold Musick: And we're right at one of those inflection points again, where I think since 21, we've been in this build stage where we've been adding things. We kind of broke it in 2021 and we've been getting back to this point of



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Jarrold Musick: it feels like we have spare capacity across the firm, which for me says it's time to go do something different and bigger. And so we just brought on board our coo about a month ago. She comes in from other professional services firm. So she's built and scaled an accounting firm. She's built and scaled something in the tech services center. And so now she's gonna do the same thing with us. And and we're taking that next leap. So

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Jarrold Musick: you know, as stuff talked about. We're about 3.5 million dollars of revenue, and we really are working to get operations and advice leaders in place in the firm

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Jarrold Musick: where Tiffany and I get to focus on building relationships, storytelling and driving the revenue picture for the firm as opposed to being as involved in the the client service work. So through all these iterations, I've really had to focus in on my myself and my routine. And what's setting me up for success, and those are some of the things that I wanted to talk through

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Jarrold Musick: and share today. So for me, it really I, as as Steph said, I'm a routine focused person.

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Jarrold Musick: I'm not necessarily a spur of the moment, like, let's go do this while crazy, different thing. And let's get everyone on board. It's like, let's plan. Let's work the plan, and let's continue to iterate on it. And so the Daily Schedule is what really drives all of that for me. And you know you read and listen to podcasts, and everybody has.

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00:36:03.520 --> 00:36:04.130

Kevin Thomas: Her.

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Jarrold Musick: Magic formula for what works really well for them for the morning routine, and you'll have whole courses that are, you know, you pay for to teach you the perfect morning routine.

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00:36:16.160 --> 00:36:20.519

Jarrold Musick: Everybody's morning routine needs to look different because your life looks different.

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Jarrold Musick: Some of the hallmarks that I found that are really effective for me, and that seem to be common across other leaders and other people who are really trying to get a lot done in their day and have a very high demand job. Is that getting up early is kind of like a cheat code. You're up before the sun. You're up before everybody else. You're up before the Alerts start going off on your phone and get white space to do whatever it is that is important to you. And so that wake up. Time

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Jarrold Musick: for me tends to be about 5, right? Some people get up earlier, some are later. 5 works for

me because I have 8 year old twins who go to school, and I wanna make sure I get stuff done so that I'm back and able to see them and get them off to school and then get on with my professional life day.

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00:37:05.646 --> 00:37:09.120

Jarrold Musick: The earlier you tend to get up and leave

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Jarrold Musick: the earlier. You need to get up so that you have some of that white space time. So if you can afford to get up at 6 Am. I would recommend it. I think ideally, I'd love to get up at about 7 30 in the morning. Just doesn't work for me. So thinking about when you need to get that hour for yourself to set your day up

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Jarrold Musick: that should really dictate the wake up time. So does anybody currently have, like a an early morning. Wake up time that, Chris, you've got one. What do you do with that time? Is that like journaling, meditating, working out? What do you like to do?

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Chris Wedell: I work out.

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Jarrold Musick: Work out.

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00:37:46.800 --> 00:37:51.320

Chris Wedell: Yeah, I have like a full home gym, so I've got kids that are

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Chris Wedell: 10 and 12. So I have to get up and get it done and showered before it's time to wake them off to school.

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Chris Wedell: Yep.

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Jarrold Musick: Yeah, that white space, like nobody else, owns that time before the sign comes up you get that.

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00:38:05.070 --> 00:38:06.230

Jarrold Musick: That's awesome.

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00:38:07.600 --> 00:38:10.929

Jarrold Musick: you know. I say body movement. I think a lot of

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Jarrold Musick: a lot of people advocate for getting your mind right and for me my mind follows body. So if I get my time to work out if I get my time to honestly not talk to other humans for a good hour. That's a really good time for me to get set up so that I'm available. I'm present, and I've started the day with momentum where, you know it's either heading to the gym or out on a run. I feel like I've already gotten where I want to go.

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00:38:38.240 --> 00:38:47.900

Jarrold Musick: Steph, did you have anything else that that you really have seen. That's highly successful for either yourself or other folks in limitless that you'd want to add for early morning.

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Stephanie Bogan: I think it's just I was putting in the chat. You know, there's a a ton of research around this that essentially says, how you start. Your day sets your day.

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Stephanie Bogan: And so I you know I didn't used to wake up early at all. I had kids, and now, like at 4, 30, or 4, 45. I just think but the best thing in the world is not having an alarm clock wake you up to me. That is just a sad form of human torture.

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Stephanie Bogan: and you know, I there's a lot of research around this that says they're kind of was putting in the chat 3 basic ingredients to success in terms of feeling happy, energized, high, performing, irrespective of what right, whether we're a stay at home, parent or the Cg of a fortune. 100 company. And it's basically mind movement and meals. Right is our is our head space clear and good? Do we? Feeling as we've talked so much about empowered

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Stephanie Bogan: movement. To Jerry's point, they've actually done a lot of studies that show walking is just as effective as anything else.

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Stephanie Bogan: Right? So it doesn't have to be. And I go crush a half a marathon at 5 o'clock in the morning. I there are days where I literally get up, and I'm like, no.

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Stephanie Bogan: even though I'm awake. My body's like it's cold out there like in Costa Rica. It was easy in Park City. It's a little bit more work, and there I'm almost where I just remind myself. Today I'm just exercising my willpower. That's why I'm just exercising my discipline muscle. I'm just gonna walk around the block. And I'm sure this happens to you, Jared. Right as soon as I get around the block. I'm like that wasn't so bad. Now, I just like, now I've got some energy, and I wanna start a run.

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Stephanie Bogan: you know, 5 or 10 min of movement, you know, stretching in the living room, putting on a Yoga video genuinely, especially if you can get outside, is really fantastic, according to a lot of the research. And then meals



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Stephanie Bogan: right? Just 80% of our health is what we put in our body. As we've talked a little bit about. It's I mean genuinely

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Stephanie Bogan: So if we're if we're not, you know it's it's so crazy because the secrets, you know sleep well, we see it, and everything like, sleep. Well, right? Hydrate. Drink a lot of water, eat good foods. And we're like, your brains are like, yeah, yeah, yeah, we know, like, we are so good at skimming over the basics because they're inconvenient.

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00:40:56.020 --> 00:41:23.710

Stephanie Bogan: But if you think about it genuinely, what happens when we don't sleep well consistently when we're not eating right good and healthy food. When we're not, we feel less good, right? And when we don't feel better we don't do better. So you know, if your morning routine to Jerry's Point, isn't, you know, getting up at 4, 30 and getting an hour to start? Like as we talk about? What's that next winnable step. Can you, you know? Can you get up and do a 10 min.

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Stephanie Bogan: you know, walk or meditation, or just to stretch, or right? Just 5 min of reflecting on your intentions and your goals like if you can't. If an hour makes you panic, that's code, for you really need it

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Stephanie Bogan: genuinely. The right the saying around. If meditation is right, everyone should meditate. Have you heard me say this, Jared? Everyone should meditate for 10 min a day unless you're too busy, and then you should definitely meditate for an hour.

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00:41:48.190 --> 00:41:56.559

Stephanie Bogan: Alright. So as soon as we're like, I don't have time to create space for myself. That is genuinely your clue

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Stephanie Bogan: that you would be served by creating even 10 or 15 min for yourself. What's important is to insert that intention. What I'm gonna call an intention routine right? Jared's is great. I love that hour I would not give I mean gosh! I just would not give it up now. I used to think who would do that. And now I'm like, I can't believe everyone doesn't do this because the you know that we don't hit all those days. But.

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00:42:20.050 --> 00:42:30.819

Stephanie Bogan: man, the days that you do you're clear. You're focused. You're energized, you know what you're doing. Like you. I genuinely have better days, and when I string a lot of those days together, I feel like I can take on the world.

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00:42:30.890 --> 00:42:43.541

Stephanie Bogan: So you know, if that blows your mind like, it's okay. What I want you to get really clear on is, do you have a daily practice? Research says mornings are absolutely the best. But do you have a



daily practice

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00:42:43.940 --> 00:42:46.920

Stephanie Bogan: for setting. In reflecting on intention.

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00:42:47.250 --> 00:43:14.400

Stephanie Bogan: We think about affirmations. We think about goals. We think about running cause. We want to be healthy. They're all a form of intention. And so, if you can insert intention in the form of a routine into your day, particularly your morning. The research says that you join a small club of happy, happier, higher performing individuals when it comes to work and life. And I don't know about you, but that's the kind of thing I'm willing to give up just a little bit of sleep for.

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00:43:16.050 --> 00:43:31.507

Jarrold Musick: And you know, as we've said here, there is no perfect morning routine, but there's the one that works for you, and there's gotta be something to it when literally everybody who accomplishes a lot talks about their morning routine and wants to talk about it. So

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00:43:31.890 --> 00:43:40.396

Jarrold Musick: I like simple rules, and a simple rule is, get an hour for yourself before anybody else gets a claim on your time, and allocate that where you need to.

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00:43:40.961 --> 00:43:45.399

Jarrold Musick: If you want to go to the next slide, Steph, you know, kind of toggling over to

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00:43:45.920 --> 00:43:56.050

Jarrold Musick: really thinking about not only the morning, but having yourself already set up to succeed in the morning starts the night before.

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Jarrold Musick: So for me, I don't like journaling or meditating, or doing heavy thinking at 5 o'clock in the morning. It just doesn't go. Well, I've tried it. I've tried to do to wake up and meditate, and I've actually fallen back to sleep a couple of times doing it.

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00:44:09.707 --> 00:44:30.620

Jarrold Musick: It's not my thing that may work for you. That may be the optimal time for you to meditate or journal, or do those other things. So for me, I really like setting myself up for success the night before. So, having just a simple notebook where I'm asking myself questions, I'm reflecting, what did I learn or accomplish on the day

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00:44:31.140 --> 00:44:55.560

Jarrold Musick: what were the intentions that I set for that day? Did I accomplish them? Did I actually get to my priorities. And then what does that tell me about setting goals and priorities for the following day? So I really don't like having more than 3 priorities. If I can get away with it. I try and set one for the day, and it's usually what is the one thing that if I can check that off the list, whether it's personal, professional, whatever.



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00:44:55.660 --> 00:45:16.430

Jarrold Musick: I will know that I had a successful day. I really try and think hard about that the night before and say, Okay, what am I absolutely gonna get done? And maybe it's I have a big race coming up, and I have a really big workout that I wanna hit really well in the morning. Awesome. That may be my number one for the day, or it may be I really wanna show up strong for my kids in this particular aspect.

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00:45:16.430 --> 00:45:31.441

Jarrold Musick: and everything else is, gonna take a backseat to that and often it's professional. Right? Here's the one big thing. I wanna make sure I get done, or the 2 things, but usually not more than 3. Because if you have too many priorities, you have none which I know, Steph, you always advocate.

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00:45:31.710 --> 00:45:54.069

Jarrold Musick: It's, you know, deliberate, prioritize, prioritize absolutely key. And then setting out the physical things that that you need to be successful for that first hour in the morning. So if you are somebody who meditates journals, maybe you need. You know your candle, your mat your notebook and your pen. Just set them all out. So all you have to do is roll out a bed and go there and do your thing.

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00:45:54.070 --> 00:46:06.460

Jarrold Musick: If you're a workout person, have your stuff already ready to go, because you're a little bleary-eyed, and you have to think about well, what workout pants am I gonna wear? Oh, I didn't decide. Am I going to the gym, or am I running?

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00:46:06.490 --> 00:46:15.849

Jarrold Musick: Just lay all that stuff out? Automate your decision making process. So that you're you're optimizing and protecting that hour of sleep that you're giving up for something more powerful.

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00:46:16.257 --> 00:46:22.400

Jarrold Musick: Steph, what have you found for yourself in terms of like night before prep. That works really well. The stuff.

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00:46:22.635 --> 00:46:27.350

Stephanie Bogan: Your timing is great. It's like you can hear me or something I was just saying in the notes

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00:46:27.818 --> 00:46:52.380

Stephanie Bogan: the number one thing that's legit like I've been putting off these flights to Africa forever and like it's such a pain. I gotta call Amex right now. I gotta cap. You know, I'm just like. And then yesterday I was like, today. It is the number one thing I am not going to Africa, and it was like it like I mean, it was just like pulling out my fingernails to start the process. You know who wants it. It's just I had all these miles, and I couldn't. It was too complicated to give to my poor Ea, who's new

192

00:46:53.100 --> 00:47:05.700

Stephanie Bogan: and it felt fantastic as soon it was done. I was like woo which is right. Why, we tried to do that first around morning routines to your point. I just put a note in. If I don't set things up.



193

00:47:05.700 --> 00:47:27.329

Stephanie Bogan: There is a 90% chance that I get distracted as I walk in the kitchen to get the water. The laundry looks so lonely. Wait, I'll just throw that in quick, and for me that literally will spiral in. I check the laundry. And then I did this, and then I'm like, what am I gonna make for dinner tonight? Let's open like I'll I'll start going into the next phase of my day. Very naturally

194

00:47:27.960 --> 00:47:40.889

Stephanie Bogan: it's like when I'm traveling like I was. We were retreat last week, so I had literally last night. My gym right, my yoga like all right there I got a new Yoga pellets in the room over there. Like if I don't have those things set up.

195

00:47:40.980 --> 00:47:59.940

Stephanie Bogan: if I'm not like, if I'm in a really good like I've been going for like weeks or months, and I'm real like then it then I'm a lot more solid. But when I've been traveling a lot or things like that I have to get it ready the night before, or I'm just entirely too distractible. Genuinely, I'm like, oh, I'll get to that, and I don't know. To Jared's Point.

196

00:48:00.000 --> 00:48:25.290

Stephanie Bogan: I go through phases where I love getting up right around 5 or so. I feel like I need to like I wanna be. There's a lot of. We have a lot of conversation about kind of brainwave state and the researches. Right? That's that veil, if you will, between conscious and subconscious is the softest or the most permeable. When we're first coming out of that sleep phase right? And we're not yet in right, Beta, if you will. Right. We're still in like Delta into Theta.

197

00:48:25.600 --> 00:48:30.369

Stephanie Bogan: and so to put to Jared's point if you fall asleep. But it's not very helpful.

198

00:48:30.694 --> 00:48:44.950

Stephanie Bogan: So I tend to like, go get a water and kinda just get a little bit awake. And then I went through a period where I was feeling very awake and creative in the morning, like I wanted to read the book and come up with ideas. And so I kinda shifted for a bit

199

00:48:45.020 --> 00:48:55.729

Stephanie Bogan: because I I you know I'm trying to sit still, and I'm like, but I need. I wanna go. So then I'll go through a phase where it's like I'll get up and I'll read, and I'll use that time to be a little bit more creative.

200

00:48:55.990 --> 00:49:05.289

Stephanie Bogan: right? And then I'll meditate before right before the kids wake up. You know I'm sort of right, as you all know, right as chaos takes over the household in the morning.

201

00:49:05.740 --> 00:49:09.920

Stephanie Bogan: So to me it's delaying the tracks. If we lay the tracks

202

00:49:10.080 --> 00:49:31.074



Stephanie Bogan: right clear talks about this with habit stacking. If you do multiple things right, cause the resistance that we experience that we have to overcome is reduced at the time, right the night before, when we're setting intention, we're most likely to align our actions with our behavior at 5 15 in the morning when that little voice in our head says, Hey, we can just hit snooze one more time.

203

00:49:31.370 --> 00:49:44.390

Stephanie Bogan: That's not when we wanna be making those decisions right? So I was just noting like, if it's all set up, I can just fall into autopilot. Get up, put on pants right, put on sweater. Go downstairs, get water, walk to yoga, mat, sit down.

204

00:49:44.827 --> 00:49:49.219

Stephanie Bogan: If it's not already somewhere in there my brain will happily distract me.

205

00:49:49.860 --> 00:49:50.580

Stephanie Bogan: Yep.

206

00:49:50.890 --> 00:50:13.699

Jarrod Musick: And that's a key for all of us as leaders as well is we hit decision, and I mean, how many of you, if your spouse asks you. I don't know what you what I want for dinner. What do you wanna do for dinner? How many of you have ever wanted to screen when you're like, I just can't make one more decision today, like, please don't ask me to make one more. I think that's part of the power of that first hour is.

207

00:50:13.700 --> 00:50:28.699

Jarrod Musick: if you've already automated and said, this is what I'm gonna do. I'm fully prepared to do it. All I have to do is get up and do it. You're not burning any of your willpower or decision making ability. You're just executing on autopilot, and you're able to get into your day.

208

00:50:28.700 --> 00:50:53.470

Jarrod Musick: And one thing that I found as I really started utilizing this daily structure is that I get better at automating more decisions based on the success that I have in doing this. So it becomes, okay. What am I gonna do? First, when I get into the office? Okay, you know, Steph talks a ton about batching email. And if you're on teams or slack, or any of those other internal communications

209

00:50:53.470 --> 00:50:58.529

Jarrod Musick: tools, how can you batch those and mute alerts and put them in their proper place.

210

00:50:58.850 --> 00:51:12.029

Jarrod Musick: I think just starting well and starting at the night before. Gets you really good at how much of this can I batch and automate so that I don't burden myself out throughout the day? And that's where I think, setting up the night before really matters.

211

00:51:12.401 --> 00:51:41.430

Jarrod Musick: Steph, would you be able to click over to the next slide? Because I have one more point that I wanted to make on on night before, and I think, an area that talking with more people, and for me in particular, where we get tripped up is that we have trouble going to sleep. We have trouble turning



our brain off and deciding that we're done for the day. And so how do you actually set yourself up so that you can go to bed at the proper time, so that you can get up at the proper time and have good energy throughout the day.

212

00:51:41.430 --> 00:51:59.384

Jarrold Musick: And for me, that really comes down to sleep hygiene and making sure that I'm ready to shut down for the day. So when we and this is one area where I've looked at the research a bit more. And because we are so connected to that circadian rhythm of just

213

00:51:59.730 --> 00:52:17.460

Jarrold Musick: here's the the light levels and those change throughout the year and what we're trying to do. We're very photosensitive. And so making sure that you're setting up yourself to wind down and not having lights onto the Max. And you know, 70 inch flat screen TV, right in front of you and all of those things.

214

00:52:17.719 --> 00:52:42.110

Jarrold Musick: Can we start dimming them down as we get to to the end of the day. So for us when we put our kids to bed at 8 or 8 30, if they're being Gremlin's not wanting to go to bed. You know the second I come back downstairs. I'm turning off all the lights other than the room we're in. I'm dimming the light levels down, and I'm trying to get my body ready that like, Hey, it's the end of the day. We're gonna need to go to bed here.

215

00:52:42.486 --> 00:52:46.399

Jarrold Musick: So lowering light. And then volume levels is a really big one.

216

00:52:46.410 --> 00:53:14.350

Jarrold Musick: And then, as I've looked at other, you know, sleep and bedtime routines having some type of ritual where it's something you enjoy that is signaling to your body. That, hey? We're done for the day. We're winding it down, and that could be meditation that could be stretching, you know, that could be lighting fire in the fireplace, whatever that is, having some type of ritual that says again. We're gonna shut this thing down. For me it is meant herbal tea, which I

217

00:53:14.350 --> 00:53:22.130

Jarrold Musick: you know. If I think back to my younger self, I'm like. God, what a nerd you're talking about! How can I drink? Meant herbal tea so that I could go to bed early.

218

00:53:22.405 --> 00:53:45.240

Jarrold Musick: you know, 19 year old me hates 40 year old me, but that is where we are. So I love having just mint tea, and my wife and I have it together. I'm not really overzealous about. Does it have to be reading or watching TV, or some other type of practice? Whatever your ritual is that you like that says, Hey, Buddy, it's time to shut it down and wind it down. So you set it. Set yourself up for bedtime

219

00:53:45.531 --> 00:53:51.289

Jarrold Musick: is just something I would really advocate, so that you get to that on time and have that energy for the morning.

220

00:53:51.310 --> 00:54:00.229

Jarrod Musick: Does anybody else have, like a really cool, or, you know pleasurable bedtime routine or getting ready for the end of the day routine that you'd want to share with the group.

221

00:54:05.790 --> 00:54:06.390

Stephanie Bogan: Chris.

222

00:54:07.630 --> 00:54:15.710

Chris Wedell: I? That's when I read my daily devotionals. I have a couple of books, and it's just a nice I don't know calming headspace to help me sleep. Better, too.

223

00:54:16.200 --> 00:54:16.750

Stephanie Bogan: Yep.

224

00:54:16.940 --> 00:54:34.610

Stephanie Bogan: it's a great one Michael and I just for everyone's benefit. I told him he needs to talk about this more. I don't know if we joke it like something happens when you turn like 50 you hit that age bracket. But like he keeps he, he's really started to pay attention to a lot of this right at the individual level.

225

00:54:34.887 --> 00:54:59.600

Stephanie Bogan: He noticed when he stopped taking vitamins is like when he was traveling, and he got off his supplements. He noticed his sleep was really effective when he got back on them, like he noticed it really improved. So now he's like. Of course it's Michael. He's right like, what am I taking? And so he's really been like, we were just talking about how his sleep sleep cycle has shifted, which is really interesting. And so what you're going to find, the reason that we're having these.

226

00:54:59.600 --> 00:55:08.839

Stephanie Bogan: I mean, with all these business conversations, the reason that we're capping the quarter with this is because to Jared said it earlier, and I hope you all caught it.

227

00:55:09.710 --> 00:55:17.409

Stephanie Bogan: All the really successful people out there that people are interviewing? When was the last time you heard someone say, no, I don't do that. No, I don't do that. No, I don't do that

228

00:55:18.160 --> 00:55:24.110

Stephanie Bogan: that's like asking a fitness expert where they're like, yeah, it's confound Sundays, you know, every Friday like.

229

00:55:24.550 --> 00:55:39.659

Stephanie Bogan: it's really about how we start to manage our own per like. Can we check in and ask ourselves, am I empowered and energized every day? Do I fear, click, feel clear and focus and intentional? Do I feel overwhelmed and drugged behind the bus. How do I want to feel

230

00:55:39.680 --> 00:55:48.169



Stephanie Bogan: as a leader, as a spouse, as a parent, as a human right? And I was like, gosh, like, I sat down at 50 and said.

231

00:55:48.480 --> 00:56:02.179

Stephanie Bogan: Okay, if I died at 75, that I mean at like 25 years, and how many of that. I was like, that's kinda not exciting. And I was like, well, with modern technology, I think I could live to be 100 or so. Maybe like I don't know 117 popped into my head. It doesn't really matter

232

00:56:02.370 --> 00:56:06.700

Stephanie Bogan: but what was interesting, and then it stuck. And here's why it stuck

233

00:56:07.230 --> 00:56:12.209

Stephanie Bogan: the second that I thought about living to be a hundred or so 117. What shifted?

234

00:56:14.110 --> 00:56:24.330

Stephanie Bogan: I was no longer on the downhill slide, and I didn't feel bad. I wasn't like oh, I'm 50 like, I feel great. I love life. But when you're like maybe only 20 or 25 more years you're like, wow! That goes by quick.

235

00:56:24.990 --> 00:56:35.399

Stephanie Bogan: And then I was like, what what if I lived to be a hundred? I'm like I had 50 more years like, Oh, my God! I'm 50, and I have a little bit of actual experience now, like Oh, my God! What could I do

236

00:56:35.410 --> 00:57:03.580

Stephanie Bogan: with like 40 or 50 years. Like, I could really have some impact. This could be amazing. And then I was like, Wow, my kids, I mean, I need to be in the best shape of my life like it totally turned me on to like, okay, Post Covid. I might have been like just sliding into complacency. And now I'm like I got a lot of work to do. I gotta be in the best shape, right? And so what you'll notice with what I'll call high performers is personal. Performance is always on the agenda

237

00:57:03.720 --> 00:57:13.210

Stephanie Bogan: it has to be. You cannot do the kind of stuff we want to do with the energy level and the pace, and by pace I don't mean frantic, I mean intentional.

238

00:57:13.300 --> 00:57:33.250

Stephanie Bogan: But there's a lot of energy that goes into being intentional about your decisions taking time. Everything Jared's talking about. Most people don't do, because it's not easy to take agency over yourself. It's the hardest thing we have. If we can't do this.

239

00:57:33.270 --> 00:57:51.359

Stephanie Bogan: Everything else is compromised doesn't mean it can't be great, but it's compromised. If we can carve out 20 min or 10 min or an hour a day for ourselves to center, to align, to clarify, to make sure we are getting our needs met because we cannot give.

240



00:57:51.530 --> 00:57:58.030

Stephanie Bogan: But we do not have, and when we try the cup runs empty and gosh! Don't we feel it

241

00:57:58.100 --> 00:57:59.409

Stephanie Bogan: that we feel it?

242

00:57:59.670 --> 00:58:17.779

Stephanie Bogan: So? We actually, our kids are really loving me right now, because, of course, it was my idea I was like, yo, you know, you guys should not be on your device. I know they are on their friends right? They're teenagers. And I was like, Yeah, I don't think so. Think you should be off your devices, at least, that we they freaked out about an hour. But I was like, Okay, give me 30 min.

243

00:58:18.080 --> 00:58:27.649

Stephanie Bogan: And so that's been a shift. And like, it's weird to have teenagers who are like, I can't talk to my friends for 30 whole minutes, and I'm like, no, you just need to let your brain come down.

244

00:58:28.980 --> 00:58:36.399

Stephanie Bogan: But I note I don't know if they've noticed yet, but because they were complaining about sleeping, and I was like, Well, we'll help if you actually sleep better. So

245

00:58:36.430 --> 00:58:43.259

Stephanie Bogan: I'm tuned into it. Jared's tuned into it. Michael's tuned like. If you if you talk to people who were trying to play

246

00:58:43.390 --> 00:59:02.860

Stephanie Bogan: at their best and do funds like all of right. We're all sitting here. Ask, like, we're the asset. How do we optimize the asset physically, mentally, spiritually, because those are the things that energize and power and edify us, and right we cannot give what we do not have. Our cup must run it over.

247

00:59:03.370 --> 00:59:03.750

Jarrod Musick: Definitely.

248

00:59:04.630 --> 00:59:16.430

Jarrod Musick: And I, I love that point stuff. Because, you know, this is this is limitless. We're talking about how to build amazing businesses that do great things for the world and yourself, and get everything that you want. You know this is

249

00:59:16.430 --> 00:59:37.750

Jarrod Musick: that's the limitless mindset. And we haven't talked about business or serving clients or systems, or anything in here, because I view all of this to be a prerequisite for success cause I've tried it the other way. I've tried to grind it through and just outwork everything. And I make worse decisions. I feel worse about it.

250

00:59:37.760 --> 00:59:48.220

Jarrold Musick: And I've learned over time that this stuff has to get equal billing to all of the professional stuff that I want to do. And

251

00:59:48.300 --> 01:00:04.679

Jarrold Musick: it it's just it's incredibly important. So whatever your routine needs to look like is gonna be whatever your routine needs to look like. But there are some consistent markers of what what sets you up well, and that first hour and the stuff you do the night before to get there is really important.

252

01:00:05.065 --> 01:00:07.130

Jarrold Musick: I put it in the chat earlier.

253

01:00:07.340 --> 01:00:25.239

Jarrold Musick: If anybody's looking to automate some of this. There's a great little device. I'm sure there are competitors. This is just the one I use called Hatch HATC h and it is. It's an alarm clock, but also wind down machine, and so it kinda looks like a little flat globe.

254

01:00:25.240 --> 01:00:48.087

Jarrold Musick: and the top of it lights up. And so for the wake up cycle of the morning, it actually mimics a sunrise. And so I have one in each of my kids rooms because they're they're little monsters, and we try and wake them up in the morning but it gradually gets brighter, and you can have like ocean waves, or a forest with birds in it, and it gradually gets louder and louder. So it's supposed to wake you up more naturally.

255

01:00:48.360 --> 01:01:08.476

Jarrold Musick: They also have wine down in the evening. So if you have trouble going to bed, this is something you could put in your living room, and even if you're there doing work watching TV, you know, chat with your significant other. Whatever you can set it up from the corner and light will turn on really bright, and it'll have music or whatever you choose from their menu of things.

256

01:01:08.760 --> 01:01:23.449

Jarrold Musick: That's kind of louder, and the light gradually dims over whatever kind of duration you have. I think a half hour is a good time, and the noise level goes lower and lower and lower, and it's a good way to feel like you're almost in this natural environment. You have the sun setting on you.

257

01:01:23.450 --> 01:01:50.930

Jarrold Musick: and it's time to go to bed, and you can set that up from your phone on whatever kind of schedule you want. So if you know, hey, I really wanna be in bed at 9 30, you could set your hatch up to go off on that cycle, starting at 9 and go down to 9 30. Just trying to give some easy tools. If that's something that you struggle with on the go to bed or wake up. I think it's a great little device like 150 bucks on Amazon. It's really not a big, not a big spend, and something that could be worth trying.

258

01:01:51.370 --> 01:01:53.640

Stephanie Bogan: I'll have to try that with the kids especially.

259

01:01:53.950 --> 01:02:03.550

Stephanie Bogan: just cause it's we wake the kids up because I'm like a complex, horrible like. But still

your mom like, Hey, it's time to get up. But sure they'd prefer nature sounds.

260

01:02:03.760 --> 01:02:26.009

Stephanie Bogan: Yeah. And do you guys notice that there's a level of like intentionality, and I'm sure, Jared, you probably didn't start there. I didn't right. And you know, even though you know better, doesn't mean you always do better. But the thing I find that's interesting is, I always when you get off track or you get distracted, or you start to slip into a less high performing routine, I notice, like I always know what to go back to. I'm like, oh, that's right.

261

01:02:26.580 --> 01:02:39.389

Stephanie Bogan: What's I will honestly ask myself, like what was different today, and I'll be like, Oh, and I don't know about you, Jared. I'd be curious if you noticed this, or if it's just me which it could be I have a rule of 3.

262

01:02:39.420 --> 01:02:59.457

Stephanie Bogan: So James Clear talks about with habits. It's okay to miss one day, never to. That's kind of a like a cool rule of thumb, right? So I was sharing that with my son the other day I noticed with me. If I don't do something for 3 days in a row. That's where that's the turning point where, when I look back, I'm like, that's where I stop doing it.

263

01:03:00.180 --> 01:03:22.140

Stephanie Bogan: And so sometimes, right like I really had to make adjustments to being intentional. Hey? I'm traveling, hey? I've got a 9 o'clock session. Well, I'm probably not gonna get up at, you know, 6 o'clock ambitiously, and run to the gym and sprint for 5 miles right like, okay, I'll grab my yoga pants and I'll just do some stretching in my room to some nice music for 15 min like great! That's fine

264

01:03:22.160 --> 01:03:29.729

Stephanie Bogan: for me. What I'm really learning is, it's much more about the discipline of of inserting that time. Not.

265

01:03:29.740 --> 01:03:47.740

Stephanie Bogan: you know, when I was 30, I was like, I'm gonna go run 10 miles like I'm not trying to take over. I'm not trying to win competitions at this point, right? I'm just trying to like, wake up, turn my body on, and right. So I try to do a bit of mindset in the morning, right? Whether it's reading or journaling I always I tend to meditate

266

01:03:48.081 --> 01:04:15.910

Stephanie Bogan: in the evenings I'll almost always like Chris, read something reflective, and then journal. And for me, gosh! When I journal like a better human, I haven't actually, for the last couple of weeks I've been traveling sick, and and I'm like God when I sit down in the evening, and I just take and I get tired. And I'm like just 10, you know stuff just 5 or 10 min, that's all it takes, and I'll sit down, and every time I will be like so glad I spent that 5 or 10 min, because we internalize everything.

267

01:04:16.250 --> 01:04:22.229

Stephanie Bogan: and we talk to our spouses a bit, or we have those glasses of wine. But that genuinely is



268

01:04:22.520 --> 01:04:48.380

Stephanie Bogan: pushing it away like we're. But we're not. We're soothing it. We're not solving it. When we just sit down and journal, or we take that walk. And we reflect, why am I feeling this way, and how could I show up better? What do I really want here? That is the most valuable time we have, and I mean, the universe is nice. We don't need to do it for 19 HA day, right? 10 or 15 or 20 min of reflection. If you do it consistently, you will find as a game changer.

269

01:04:48.650 --> 01:05:10.330

Stephanie Bogan: But yeah, Clear has the you can miss once, but not twice, and I have the rule of 3, which is, if I've missed 2 days and I go to Miss 3. I'm like, oh, no, no, no, I'm basically signing up for, and I don't know about you. But when I get into a good workout routine and then I don't. It's like, Oh, God! Why did I ever stop doing that? It's so much easier to maintain it versus right? Started again.

270

01:05:11.700 --> 01:05:19.179

Stephanie Bogan: so I use the rule of 3, which is, I just can't miss more than 2, because if I do, it's 3, and if I do 3 like I know exactly what happens.

271

01:05:20.380 --> 01:05:42.420

Jarrod Musick: Yeah. Habits, you know. Going back to James Clear, I think the the time it takes to cement a new habit and automate. It is like a hundred plus days, right? It takes a long time for us to just have something that's kind of wired into our our behavior patterns. But it does break pretty easily, and that's where I would really recommend leaning on a limitless communic

272

01:05:42.420 --> 01:06:02.900

Jarrod Musick: community. So if you have something specifically that you're working on, you know, lean on other leaders, lean on people in your cohort. Find an accountability, buddy, for something that you wanna do, whether that's you know, a habit or practice that you're trying to create inside your firm, or personally, or whatever it is cause these habits for me.

273

01:06:03.040 --> 01:06:28.389

Jarrod Musick: They took a very long time to really get into and now I really don't have to think about them. It's not a choice anymore. It just becomes a you know. I'm here. I'm at the Broadmoor snowing. It took me 2 h to drive here this morning, and so, as I was setting up my day last night, I, said Jeeze, looking at the weather forecast. I don't think I prepared to wake up at 4 am. To get my workout in to get in the car and drive down here.

274

01:06:28.670 --> 01:06:37.350

Jarrod Musick: So I'm gonna swap it to the evening, which I really try not to do, because other stuff always interferes. But I was able to make that choice last night.

275

01:06:37.640 --> 01:07:00.459

Jarrod Musick: because I have the habit, because I have the system that said I need to get set for the morning. I need to make sure that I'm set up for success. This is what I'm gonna do for the following day, and and that just took a long time to get there. So whoever you need to lean on limitless is fabulous because you're all working on the same thing, which is, how do I create a great business and a great firm that does great things and



276

01:07:00.460 --> 01:07:08.290

Jarrold Musick: creates that same value for me and that same outcome for me and my family. So it's a great place to lean on others who are trying to do the same thing.

277

01:07:08.560 --> 01:07:25.399

Stephanie Bogan: But you notice when you listen to Jared right? And if you observe him, and just everything like clear talks. A lot about this, too, is W. Our habits. When they align with our values they become cemented. They that to Jerry's point there isn't a there's a difference between a choice

278

01:07:25.460 --> 01:07:45.039

Stephanie Bogan: and a values based commitment. If you genuinely wanna be happy and healthy, right like at a level like Hey, my mom died at 45 of a heart attack. And I want, I'm like, I need to wanna be a healthy person to be here for my kids. If you fundamentally believe that is a value. You will simply not go make choices

279

01:07:45.050 --> 01:08:05.139

Stephanie Bogan: that don't align with that right. And you don't have to like, hey? I believe in eating healthy, but I still believe a hamburger is what you know makes life worth living once in a while. Right? So so I'll eat hamburgers once in a while, right? If I fundamentally believe you know differently, then my behavior would be different. And so to Jared's point over time. Those habits.

280

01:08:05.260 --> 01:08:12.789

Stephanie Bogan: the habits, what we're saying is we're sitting in that space of reflection. We're asking ourselves, we're taking a personal inventory

281

01:08:12.850 --> 01:08:31.113

Stephanie Bogan: of who we are and what we're doing and how we're showing up across the facets of our life. And then we're saying, Is this the person I'm happy with and really proud of in terms of who I am, what I'm being, having, achieving and experiencing. And then we always right. We do this with resolutions or hopefully exercises of intention. And we ask ourselves.

282

01:08:31.840 --> 01:08:43.500

Stephanie Bogan: who do? I want to be, I wanna you know, like I wanna live to be. Now, you know, 100 or 117, I figure like, let's take the next 40 years and do some really cool stuff like, hey? Why not like

283

01:08:43.540 --> 01:09:02.990

Stephanie Bogan: I am a lifeaholic by nature. It's just who I am and how I'm hardwired. And that's probably just because I didn't get a lot of life in the first part. And I was like, I need to make up for it like if you we were at Retreat. And someone said, Do you want to do something? And I said, Yes, and they said, Do you didn't even hear it. And I'm like it doesn't matter unless it's like dangerous or illegal. Yes.

284

01:09:03.370 --> 01:09:16.310

Stephanie Bogan: right, just because my whole childhood was no. So this is where it's really about what is the value system that we want to instill with our habits. And as Jared mentioned as they

285

01:09:16.399 --> 01:09:18.299
Stephanie Bogan: as they cement.

286

01:09:18.359 --> 01:09:27.749

Stephanie Bogan: they become non-negotiables right? And then we don't think about them anymore. And what we've done essentially is align. Our habits, which is code for our neural pathways.

287

01:09:28.330 --> 01:09:32.410

Stephanie Bogan: right? Our operating system with our belief system.

288

01:09:33.930 --> 01:09:57.199

Stephanie Bogan: And when those 2 things happen, then you get coherence. And that's when you're not Jared. You notice Jared doesn't sound like he's working for it. He's not like Oh, shoot, I mean, I'm sure there are days. Trust me, I haven't too like, but it becomes the non negotiable, like the shift becomes like, oh, I have to do it. The shift is oh, I gotta do that like. Oh, I didn't get to do it yesterday. If I don't do it today. I'm just gonna feel off my game.

289

01:09:57.320 --> 01:10:13.070

Stephanie Bogan: Oh, I can't go 3 days in a row. I always feel crappy when I don't go right like it becomes the thing that you look forward to, hey? I need, you know Jared's not sad. He's up at 5 o'clock, but it when you haven't done that before, and your brains like what you need to get up an hour earlier. That sounds awful

290

01:10:13.910 --> 01:10:19.759

Stephanie Bogan: right. It's how we want to use the time that we have, and we just don't tend to use very much of it.

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01:10:19.990 --> 01:10:29.479

Stephanie Bogan: Setting ourselves up for success, we spend all of our energy on the external things. We're in a society that tells us we can't, we shouldn't. It's selfish.

292

01:10:29.930 --> 01:10:40.239

Stephanie Bogan: It's the least selfish thing that you can do. My husband will tell you. I'm I'm way better human when I do these things right way, funner to be around than when I don't.

293

01:10:41.210 --> 01:10:45.460

Stephanie Bogan: And so we're just usually so busy giving that we don't take the time for ourselves.

294

01:10:47.230 --> 01:10:53.460

Jarrold Musick: And and going back to James Clear. And, you know, really encoding certain pieces of your identity.

295

01:10:53.917 --> 01:11:04.500

Jarrold Musick: You know, I've really tried to to focus on. I am an intentional business leader, right? It it used to be when I entered the business.

296

01:11:04.510 --> 01:11:30.130

Jarrold Musick: I really wanted to be a great advisor for my clients. I wanted to know that I was delivering value and make sure that I was able to do that consistently, and I've had to change it over time. I've had to go from. Okay, I'm a great advisor to. I'm a great business builder. I need to make this about more than just being an advisor to. Now, I've had to really try and internalize, like I'm an intentional business leader, and that's

297

01:11:30.130 --> 01:11:37.189

Jarrold Musick: just part of it. You know, I really want to be. If I fail at everything else in my life. I want to be a great dad.

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01:11:37.320 --> 01:11:38.340

Jarrold Musick: and

299

01:11:38.370 --> 01:12:02.690

Jarrold Musick: that's Number one and part of being a great dad is well, I need to be able to demonstrate what it looks like to be successful in a professional capacity. And what what does that mean to me? Well, that means being a really intentional business leader who builds a great team and a great business that does great things. So I've spent a lot of time bundling all of this stuff together to create my own

300

01:12:02.690 --> 01:12:20.020

Jarrold Musick: self image of what I want to be and who I want to be, and then looking at systems to execute it. And we have those inside the business as well. Right? So we have our quarterly leadership meeting. That's happening on Friday this week, and we have a methodology for that. We have a preset agenda for that. We have

301

01:12:20.040 --> 01:12:34.749

Jarrold Musick: different things that we're going to walk out of the meeting, having discussed and decided on, all of those are systems that allow us to execute at the level that we want to execute at, and you can do all that stuff on an individual basis, too.

302

01:12:35.210 --> 01:12:35.760

Stephanie Bogan: Yep.

303

01:12:36.050 --> 01:13:03.809

Stephanie Bogan: yeah. And I pulled in. Jared mentioned like there we talk about the launch process, right? Which is very similar to Eos traction minus the level 10 managers meeting, which most of you don't have. L. 10 managers. But it's really about setting a vision reviewing it on a cycle in this case 90 days right? If you think about that launch process setting your bigs and priorities for the quarter, that is just another level of leadership accountability. But instead of it being personal.

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01:13:03.970 --> 01:13:12.189

Stephanie Bogan: it's business. It's saying, if I'm gonna ask these people to come invest their time and energy right, they're human capital



305

01:13:12.210 --> 01:13:16.750

Stephanie Bogan: that we want to create a great place for them to do that that they feel good about. We want that

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01:13:16.760 --> 01:13:28.480

Stephanie Bogan: the the culmination of that to really result in a positive impact for our clients, and ultimately a positive impact for all of the stakeholders. And as you've all figured out, that does not happen by chance.

307

01:13:28.950 --> 01:13:41.239

Stephanie Bogan: Imagine if we sat down at the beginning of every day and said, I am a, you know, thoughtful, patient parent. I am an intentional business leader that aligns my actions with our values and priorities. Right? I if we just

308

01:13:41.280 --> 01:14:01.759

Stephanie Bogan: room if we're laying those tracks, those tracks become the pathways, quote right bot habits or behavior habits. And so having those meetings on a quarterly basis communicating with the team. Remember, clarity, transparency, accountability. It's baked into the system right. So Jared's not just creating accountability

309

01:14:02.160 --> 01:14:29.518

Stephanie Bogan: and and what we'll call right personal mastery. He's then this is magic. How it works, able to then start to express that through the organization, through the culture, through the clarity, through the leadership style, right? It right. The old G one had a way in a style right tiff, and Jared had to come in. Who Jared talked to you about that all day long. All those shifts you don't just cross your fingers and hope through that.

310

01:14:29.930 --> 01:14:42.426

Stephanie Bogan: There's decisions. There is tough communication. There is. What is the game plan here? There are unexpected surprises, right? And exits always exits 50% of the time. There are exits.

311

01:14:44.410 --> 01:15:05.190

Stephanie Bogan: where we, when we have to address those issues, is right. So if we have these backstops or benchmarks, then what that tells us, and this is why we don't do it predominantly. And our team are we accountable as leaders at holding ourselves and our team accountable to the things that we say we want to do with our time, energy, and capital

312

01:15:05.550 --> 01:15:16.480

Stephanie Bogan: right? What are we choosing to invest our time in, and to what effect, and it's scary as a leader to say, here's the vision, here's the goal. We're gonna you know. What if we don't hit it? What if

313

01:15:16.500 --> 01:15:20.625

Stephanie Bogan: but what Jared will tell you. I have observed this with him and Tiffany.

314



01:15:21.280 --> 01:15:41.400

Stephanie Bogan: They had what I call the great. Remember the great reckoning right. They at 1 point our council to them was right. Sit down with your team and say, Hey, we didn't get it right, like we've been doing XY or Z, and we know that you need A, B and C, and we own that no blame, no judgment, no criticism of them, although I'm sure Jared will tell you there is plenty of that to go around, too.

315

01:15:41.400 --> 01:15:55.440

Stephanie Bogan: It was just a form of extreme ownership that said, we're gonna take responsibility, hit the reset button. And then we're gonna lead with clarity, transparency and accountability from here. Right? We're gonna level up

316

01:15:55.480 --> 01:16:09.679

Stephanie Bogan: to model for you leveling up. And they did that. And I think you guys, like everyone else, probably had 30 to 40, fif, 30 to 50%. Michael had 50% turnover as directors right through that first tranche of change.

317

01:16:10.051 --> 01:16:13.919

Stephanie Bogan: We don't like those ideas like, Oh, why would I hire people just to have app

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01:16:14.220 --> 01:16:39.892

Stephanie Bogan: half of them leave? Because you eventually find. Right? You learn what you need about the role. And you find the right people. So we've talked a lot about the business accountability piece. But this is why we're modeling ownership and accountability as a behavior as a core value. And Jared, I'm sure, will tell you right. As a leader. You give yourself a lot of valuable insight and information to help you make those decisions

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01:16:40.490 --> 01:16:59.469

Stephanie Bogan: in a more educated and informed way, which doesn't mean it's perfect, but it means the probability of success. When you sit in that place of intention, when you seek counsel from your peers, when you right leverage all of the resources available to you, you're much more likely to make clear and conscious decisions that are aligned with the goal.

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01:16:59.470 --> 01:17:11.030

Stephanie Bogan: So, Jared, do you just want to talk a little bit about how you reconcile right plans, agendas, benchmarks, and you know, just from taking that leadership accountability and making it team accountability.

321

01:17:12.090 --> 01:17:36.669

Jarrold Musick: Yeah, absolutely. You know, Steph said, that was a big area that we had to focus on in 2021 was essentially saying that we had, we'd screwed up in some areas we hadn't communicated clearly decision making methodology at the firm level didn't fully. It either. Over involved the team in certain areas and let them have too much input without good guardrails around that or

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01:17:36.670 --> 01:17:45.490

Jarrold Musick: excluded them. And we were delivering and saying, Here's what we're doing guys? So just our our communication and decision making methodology was not solid.



323

01:17:46.140 --> 01:18:05.170

Jarrold Musick: We've taken that. And we've really instituted. We have a quarterly team week that we execute every quarter because we have a distributed team. 2 of those are virtual. 2 of them are in person. So we're gonna have one in April. So we have our leadership team meeting where we're talking about. If anybody else uses us. Traction

324

01:18:05.483 --> 01:18:27.400

Jarrold Musick: you know the rocks that we have as a firm who owns those rocks, how those are all tying into our 1 3, and you know longer term one year, 3 year and longer term vision. And then we're meeting with the team in person. And we do our town hall. So we're briefing them in on here, big initiatives, decisions, things that have worked things that aren't working.

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01:18:27.400 --> 01:18:44.140

Jarrold Musick: Here's what we're gonna need out of the team. What do you guys have in terms of feedback? How do you feel about these different issues? So we've had to get really disciplined about, how often are we having those conversations, and how in terms of what guard rails are we giving? Because when you have

326

01:18:44.310 --> 01:19:04.059

Jarrold Musick: employees, they're not owners, which is a wonderful thing. They wanna come in. They wanna feel valued. They wanna contribute to the mission and do their job. But they don't necessarily wanna have to ideate on the future of the firm and solve these uncomfortable problems. So giving them guard rails. That says we've already decided that we don't have the whole universe of options. Here

327

01:19:04.450 --> 01:19:08.770

Jarrold Musick: we have this set of options, and we feel good about either A or B.

328

01:19:08.860 --> 01:19:32.070

Jarrold Musick: How do you guys feel about A or B, what's your feedback on that? Or, Hey, we've already decided on A, but we haven't done all the implementation steps. What we need you to help us with is implementation steps to best get to option. A right? So we need to get much better about giving good guardrails, but still soliciting feedback and helping our team feel like they were involved in the decision making process. So

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01:19:32.396 --> 01:19:56.860

Jarrold Musick: I think just in terms of our overall communication and decision making cadence. We have a weekly all company meeting. So that's a 1 h meeting happens every Monday morning at 10 Am. We have a specific agenda set that we run through, and a methodology where we cover every every pillar of our business and what we're working on and things that need to be disseminated problems that we're having

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01:19:56.860 --> 01:20:11.319

Jarrold Musick: having, that we want to discuss growth has been a big focus for us. So taking that out of just the growth is Tiffany's responsibility. My partner, who's our chief growth officer, we've had to institutionalize that and say, everybody contributes to growth.

331



01:20:11.320 --> 01:20:33.403

Jarrold Musick: Everybody is a different role to play, but everybody contributes. So we have a whole section where we talk about our pipeline or new client on boards, new initiatives, events, speaking opportunities, things like that. So that we've institutionalized all of that so that is a weekly process. And then we have breakout groups that also meet on Monday. So all of our client service teams or Cfs get together

332

01:20:33.710 --> 01:21:02.789

Jarrold Musick: and talk about client service work. We have a financial planning group which we've had to institutionalize all of our planning processes. So we've spent the last 2 years documenting for everything that we do for clients. Not. How does Adam do this? Or how does Jen do this? How does destiny capital solve this problem for clients? And we've been building those out as a financial planning committee and putting them into our operations manual, so that every time we do a life insurance needs analysis.

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01:21:02.790 --> 01:21:09.250

Jarrold Musick: we do it the same way every time we have the same checklist that we run, so that there's a destiny capital standard.

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01:21:09.250 --> 01:21:19.359

Jarrold Musick: regardless of who does that. So that's one of our breakout groups, and like documenting that process would have been something that was communicated during a quarterly meeting and says, Hey.

335

01:21:19.600 --> 01:21:46.909

Jarrold Musick: we need to review life disability and long term care, and set up policies for how we deliver that advice and standards that we have that would have come out of a quarterly meeting that would have been assigned to the financial planning team as a rock for them in that next quarter, and then they would work on that during their weekly meetings. So weekly Quarterly, and then an annual 2 day off site, planning retreat for the leadership team, which, out of a team of 13

336

01:21:47.191 --> 01:21:59.019

Jarrold Musick: it's now 4 of us. Since we just onboarded our coo. So that's kind of an overview of how we make decisions, how we pass information and methodology. There, Steph, did that hit what you wanted me to touch on.

337

01:21:59.020 --> 01:22:11.468

Stephanie Bogan: Yeah. One. I think it's it's great what you what you know. You're so used to it now, genuinely I think we get to take it for granted, is there, do you? There's just a level of discipline instilled

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01:22:11.890 --> 01:22:33.490

Stephanie Bogan: in the conversation. You hear it, you understand it right. These are some of the reports right. Some of Adam's reports, but, like that process, has been fully implemented, and I think the upside of that is, Jared will tell you is, they didn't start there. They didn't start with. I mean, they had a great, obviously a great practice and a good base of revenue, but he'll tell you they had a lot I mean, they had to divorce, you know.

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01:22:34.134 --> 01:23:01.560

Stephanie Bogan: divest themselves of a broker dealer, cause that makes you know everybody needs right. I mean, there was a lot a big heavy list they had to do to. I was talking with one of our other private clients this morning, Jared. Right G, one founders in their seventies and eighties. And right like they've, I'm like they've been really successful doing this. But like the world is changed a lot over the last 30 years, and the firm really has to go through like 20 years of maturation

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01:23:01.610 --> 01:23:13.669

Stephanie Bogan: over the course of 2 or 3 right. There's just a lot of disruption that most of you right now aren't having to go through and those of you that are planning those G one G, 2 transitions.

341

01:23:13.890 --> 01:23:26.400

Stephanie Bogan: limitless as we've talked about is just such a great runway for that, because you're clarifying vision. You're identifying the model, right? So everyone gets to be involved and invested. But we know what right, what we're building into.

342

01:23:26.420 --> 01:23:50.439

Stephanie Bogan: So we'll talk more about the strategic planning as we get into Q, 4, right? Because that's generally a really good time to do it. We actually start doing it in the summer around here, just because we have to have things done right on a quarterly schedule for right for every year's launch. So it doesn't, you know, necessarily have to be a September October, the bigger you are. Typically the sooner you start right.

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01:23:50.440 --> 01:24:06.289

Stephanie Bogan: Jared and the leadership team meet. Then they have to digest that. Then they have to process it. Then they have a meeting with the team and set the priorities. So we'll go more into that process. If you want to get a head start on that, you can go into the library and look up the strategic planning lesson, which I think

344

01:24:06.600 --> 01:24:09.236

Stephanie Bogan: you and Tiff did or tiff, and I did.

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01:24:09.740 --> 01:24:28.860

Stephanie Bogan: tiff or Jared were involved in that. So what you hear is you're hearing structure that supports strategy. And you're hearing just a lot of think, discipline, clarity, transparency, and accountability is now not just a hey. Jared is not just getting up, you know. Like, Hey, we go, we grow. Listen to how much

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01:24:29.230 --> 01:24:41.710

Stephanie Bogan: it's not huge sums of time, but they are, Jared will tell you. Real sums of time are being invested in those Monday meetings in the Quarterly right, and the leadership meetings. They're working on the business

347

01:24:42.070 --> 01:24:47.870

Stephanie Bogan: with intention separate and apart from the time they spend working in the business.

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01:24:48.030 --> 01:24:56.540



Stephanie Bogan: And I think that's one of the defining characteristics of great, of good leaders and good growing firms is that there is a concerted effort.

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01:24:56.810 --> 01:25:24.050

Stephanie Bogan: right? And the more intentional you get about that which is what the process right, the strategic planning right Eos or launch those processes, bake that in, and it becomes right. Setting goals and managing change to higher and higher standards ultimately becomes part of the organizational culture versus having one person drive it. And as you think about building firms that are less and less dependent on you right. Tiffany could content. If Jared, we're gone for 6 months

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01:25:24.180 --> 01:25:32.860

Stephanie Bogan: right? Doing something really cool, right? Or if anyone there were gone right, the culture could continue, because it's institutionalized

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01:25:32.960 --> 01:25:37.863

Stephanie Bogan: versus in our heads. And that's the kind of structure we're really trying to anchor

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01:25:38.490 --> 01:25:53.629

Stephanie Bogan: So that's really what vision and goals and benchmarking are. They're the Ben. They really are the bookends to what you're creating, right? Setting the vision and then creating accountability for yourself and your team around that vision, and that affects everything you do in the middle.

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01:25:55.130 --> 01:25:57.450

Stephanie Bogan: Do you guys have any other questions for Jared?

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01:25:58.160 --> 01:26:02.220

Stephanie Bogan: You're gonna get to talk to him and tiff a bit more this year. But while we've got him.

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01:26:05.560 --> 01:26:09.550

Stephanie Bogan: and then I wanted to see.

356

01:26:10.070 --> 01:26:15.260

Stephanie Bogan: did we cover this one? Did you cover phone? I think we did a little bit right, because I know I skipped over it a bit.

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01:26:16.250 --> 01:26:22.903

Jarrold Musick: Yeah, I don't think we went into it. Just you know. I'll hold my hand up. Hi, my name is Jared. I'm the phone addict.

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01:26:23.150 --> 01:26:23.600

Stephanie Bogan: Yeah, cluster.

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01:26:23.600 --> 01:26:36.760

Jarrold Musick: Right if we're in an a meeting. It took me a while to realize that it truly is an addiction. It's

it's just they are hardwired to. They're built to have us hardwired and habituated to

360

01:26:36.760 --> 01:26:50.370

Jarrold Musick: use and scroll. So I've had to move my phone charger to the office. I put it away. If I need to work more than I need to be intentional about, hey? I need to work more when I'm at home, and I'm gonna go into the office and do that.

361

01:26:50.370 --> 01:27:11.880

Jarrold Musick: I'm not gonna be in this like half work, half present mode where I've got my phone on the couch, and I'm doing other stuff just kinda wrecks my evening routine if I'm scrolling, or, you know, halfway doing work on my phone. So that's a big one. I also placed my screen setting to gray scale doesn't fire up your brain in quite the same way. If you're in black and white as if you're in color.

362

01:27:12.397 --> 01:27:21.670

Jarrold Musick: You don't believe me. Give it a try. Throw it on Grayscale and open Instagram. See if you're really interested in looking at anything. You probably won't be after a couple of minutes. But then.

363

01:27:21.670 --> 01:27:22.940

Stephanie Bogan: Interesting, just.

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01:27:23.210 --> 01:27:38.140

Jarrold Musick: Yeah, it's it's fascinating. I mean, when you have the number of engineers that are working on. How do we hook human brains into utilizing a device, and they're all highly, financially incentivized to do so. We get some really powerful devices. So

365

01:27:38.439 --> 01:27:57.860

Jarrold Musick: I I love phones. They do great stuff for us, but I've had to really distance myself from it when I'm outside of work mode when I don't need it, I should be more present doing other stuff. So yeah, that's just another little. Add on kind of tactic. If you're struggling with phones, black and white, put it in another room. Those help a lot.

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01:27:58.610 --> 01:28:08.055

Stephanie Bogan: Yeah, Kyle, who was with us last year. He's got young kids. And he said, I want my kids to believe that I don't have a phone, so he comes home. He like puts it in a basket. And I was like.

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01:28:08.270 --> 01:28:32.379

Stephanie Bogan: that's cool. My kids are texting and ptas texting and right, but we have a basket, and I just tend to put it in the basket, and then, like, I'll go check it like period. But I. But you really don't. I found you don't need to have it in your back pocket. The idea of having email on our phone seems so normal. And then, now, I'm like, Oh, yeah, I haven't had that on my phone for like, 4 years, like, Oh, why would people have email on their phone like

368

01:28:32.380 --> 01:28:43.620

Stephanie Bogan: you. The things that are you're so dug into are things that you're to Jared's point. Your brain is just like no, you can't, you can't. You can't do that. You have to be on your phone every 7 s. You might miss something.



369

01:28:44.022 --> 01:29:02.960

Stephanie Bogan: And it turns out if you set your phone down for a couple of hours. This this messages wait, or you can I do the thing right where my kids have a special ring, and if it rings more than once it goes through. It's like, Hey, mom, I really, really need you like, they have also solved for that. So technology is, I think it will wrap with a around. That is, technology is a tool.

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01:29:03.510 --> 01:29:06.110

Stephanie Bogan: And if you think about most tools.

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01:29:06.250 --> 01:29:24.780

Stephanie Bogan: you don't, you don't carry your hammer around with you everywhere you go. I don't take my kitchen aid. I'm not like carrying my, you know my vitamix with me everywhere I go, because most tools are there for us to use as we need them, and then set them down to Jared's Point. Tech tools

372

01:29:24.780 --> 01:29:41.559

Stephanie Bogan: right? The the Hammer company does not get paid the same way that Twitter or Instagram, or linked even LinkedIn does. And so they pay a lot of people a lot of money to get in like hacked into our brain, and to make it really hard to unplug. But once you learn how to

373

01:29:42.280 --> 01:29:54.079

Stephanie Bogan: reframe your relationship, so it's back in tool land, it does give you a whole new sense of freedom because your brain is not like, Oh, my God, what's gonna happen? I didn't check email for 39 min. You're like.

374

01:29:54.190 --> 01:30:03.029

Stephanie Bogan: there's an emergency. There's a system, and it will ultimately get to me. But the system should not be my checking my email 39 times as I'm sitting here watching TV.

375

01:30:03.428 --> 01:30:20.159

Stephanie Bogan: Our brains are always scanning the landscape for hazards, and that's just one of the ways they hook us. So this quarter. We've really talked about clarifying the vision. Right? So we'll be following up on that when we do our Q one check in right. We have that 3 year vision under one page plan.

376

01:30:20.160 --> 01:30:34.300

Stephanie Bogan: really diving into the as as we're so important that we're wrapping the quarter with it, which is personal performance is business performance, right? We wanna show up clear and conscious and energize and empowered. And when we do that

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01:30:34.330 --> 01:30:53.959

Stephanie Bogan: we make magic happen. I gave mine a name. It's called Mojo. I'm like man. The Mojo is so on fire right now and then. There are other times where I'm like, where's the Mojo go? I told man when I lost the Mojo. But you know it's crazy. This is terrible. So I think. Appreciate this. Do you know what I know? Every time I feel the Mojo waning



378

01:30:54.290 --> 01:30:55.450

Stephanie Bogan: every time

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01:30:56.160 --> 01:31:07.829

Stephanie Bogan: I'm like, am I doing my happy high performing routine? Huh? Oh, wait! I'm not every single time without fail, because when I do those things every day

380

01:31:07.870 --> 01:31:18.660

Stephanie Bogan: they keep me in that happy, high performing zone, it doesn't mean you don't have bad days. It means that you handle them better, and they don't become bad days, weeks, months, years.

381

01:31:18.690 --> 01:31:30.989

Stephanie Bogan: And so this is really just an invitation, because we started here. And I know we've covered a lot in 90 days. Leaders is right. A blast rate of a rocket ship to the moon. But I really wanna

382

01:31:31.040 --> 01:31:43.010

Stephanie Bogan: really put the cap on this quarter with you are the biggest asset. Right? You're the the business's greatest growth asset. You're the biggest leadership asset. You're the biggest advice, asset

383

01:31:43.010 --> 01:32:05.379

Stephanie Bogan: your time, energy, and intellectual capital are your greatest revenue and happiness, producing assets, and we don't spend near enough time getting clear on who we are and how we our how we show up as our best, physically, mentally, and spiritually, and when we get clear on that, and we put ourselves first, not last.

384

01:32:05.420 --> 01:32:16.019

Stephanie Bogan: What you'll find is that energy to get up that clarity to make decisions, that enthusiasm for what comes next is not 50 to 75. It's

385

01:32:16.180 --> 01:32:28.349

Stephanie Bogan: 50 to what could I possibly do? And hey, if I drop dead, it's 78 along the way, then, you know. So be it. But I'd much rather go out thinking I'm on this trajectory than feeling like I'm on this one.

386

01:32:28.893 --> 01:32:32.929

Stephanie Bogan: And so what I've learned truly is that we are.

387

01:32:33.100 --> 01:32:37.670

Stephanie Bogan: What is? Is it clear some bright one of the big brains. Right? Protect the asset.

388

01:32:37.840 --> 01:32:41.120

Stephanie Bogan: Rule number one, protect the asset. Rule number 2.

389



01:32:41.270 --> 01:32:50.210

Stephanie Bogan: You are the asset. You are the asset. So if we invested in ourselves the way that we invest in our teams and our clients and our families

390

01:32:50.620 --> 01:33:00.789

Stephanie Bogan: imagine what our awesome sauce would look like right. And that's where the accountability systems come in. Right? Whether it's an app I like the success shifter. Right clear has his version.

391

01:33:01.050 --> 01:33:06.590

Stephanie Bogan: You need an external feedback mechanism to say, Chris, did you do those things?

392

01:33:06.680 --> 01:33:25.800

Stephanie Bogan: Great, those thought habits, those behavior habits that are gonna help you be the best you did you do them today? Because we know at this point that the hardwired habit is the status quo. It is the conditioned living that we have become accustomed to, and we really can't radically accelerate our health, our wealth.

393

01:33:26.220 --> 01:33:44.690

Stephanie Bogan: and our wellbeing genuinely. And when we, when we get to that, when we elevate our work. That's when all the rate and our personal health and all the other good stuff happens. So that's really what this quarter is about setting yourself and the business up for success. So that as we start to implement those scale strategies.

394

01:33:44.790 --> 01:33:59.410

Stephanie Bogan: right? You're really clear and centered and conscious about what we're doing and why. And you're the best possible position to make those decisions and lead your business, your teams, and your clients, through those changes so hopefully, this quarter has been helpful in having you do just that.

395

01:33:59.750 --> 01:34:13.310

Stephanie Bogan: Jared. What Jared does not know to your point around accountability is that we started a new practice in leaders this year, which is our 30 day sheet. So I'm gonna stop notes. And I'm gonna pull up.

396

01:34:14.210 --> 01:34:18.620

Stephanie Bogan: Hold on. Where's our sheet? At Allison? I gotta find the Internet.

397

01:34:20.410 --> 01:34:22.490

Stephanie Bogan: Is that in chat. Can you try? I lost.

398

01:34:22.490 --> 01:34:24.410

Allison Foulk: I dropped it in the chat stuff.

399

01:34:24.410 --> 01:34:28.599

Stephanie Bogan: Alright. Thank you. She gave it to me earlier, and I already lost it. Isn't that awesome?

She loves me

400

01:34:28.870 --> 01:34:32.930

Stephanie Bogan: alright. I'm trying to open it now. I gotta find the chat again. Where does it go?

401

01:34:33.420 --> 01:34:35.490

Stephanie Bogan: There you go. He just disappeared on me.

402

01:34:35.950 --> 01:34:37.710

Stephanie Bogan: Alright, so I'm going to go to chat

403

01:34:40.240 --> 01:34:42.589

Stephanie Bogan: alright. So if you can open that up

404

01:34:46.754 --> 01:34:52.270

Stephanie Bogan: March is actually supposed to be April, so don't worry about that. There you go.

405

01:34:52.380 --> 01:34:56.420

Stephanie Bogan: and just take a couple of minutes to input your action items.

406

01:34:57.770 --> 01:34:59.940

Stephanie Bogan: If you want to see what it looks like.

407

01:35:01.450 --> 01:35:05.029

Stephanie Bogan: Jared can see it is not fancy, but it keeps everybody honest.

408

01:35:06.000 --> 01:35:20.700

Stephanie Bogan: Alright. So your top 3 priorities for the year. And then what do you? 30 day? Action 1, 2, and 3. If you've got up to 3 to Jared's point. These are the right. This is what I need to do. This is my number 1, 2, or 3 for the month.

409

01:35:20.710 --> 01:35:40.039

Stephanie Bogan: If I do those things. It will put me on track to hit my goals for the quarter. If we hit our goals for the quarter we're on track to hit our goals for the year. If we hit our goals for the year, we're on track to hit our 3 year goals right? So everything what we're trying to do is create an ecosystem where good decisions compound into a really great business and life. That's the goal.

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01:35:40.380 --> 01:35:42.440

Stephanie Bogan: Alright. So take a couple minutes to do that.

411

01:35:43.550 --> 01:35:49.172

Ihinton: Where do we? Stephanie? Sorry interrupt. Where do we do? Where do we find this? We wanna look at it.



412

01:35:49.440 --> 01:35:56.789

Stephanie Bogan: That link is in the chat, and you can just download the link. I'll have Alison. Can you just make a note to put that in the next inbox

413

01:35:57.270 --> 01:35:58.410

Stephanie Bogan: for leaders.

414

01:35:58.790 --> 01:36:00.370

Allison Foulk: Sure, yeah, no. Problem.

415

01:36:00.370 --> 01:36:01.020

Stephanie Bogan: Awesome.

416

01:36:01.260 --> 01:36:01.830

lhinton: Thank you.

417

01:36:01.830 --> 01:36:03.760

Allison Foulk: Alright! It's in the zoom, chat.

418

01:36:04.140 --> 01:36:06.129

lhinton: Okay. Okay. Thanks.

419

01:36:06.390 --> 01:36:07.200

Allison Foulk: Sure.

420

01:36:07.200 --> 01:36:18.549

Stephanie Bogan: And I can also we started doing a leaders check in with the group. So I'll attach those to. I'll have Lisa, attach those to this Friday's check in. You guys can see what your 30 day commitments were

421

01:36:18.750 --> 01:36:19.540

Stephanie Bogan: awesome.

422

01:36:21.810 --> 01:36:44.530

Stephanie Bogan: If you guys wanna talk through anything. We covered this quarter, getting clear on that vision, putting these personal habits and routines in place, putting the business accountability. We talked about managing performance last week in Charlotte. And why, that's important. If you want to. You could just remember, you guys have those calls that you can use. So we have our check ins beginning of the year mid year

423

01:36:44.793 --> 01:37:02.540

Stephanie Bogan: and as we do planning and goal setting for the following year. But you've got those



coaching calls in between. So if you're ready to dive into anything you can reach out we'll also be sending out the quarterly check in first week of April, which will give you the option to set up a call then as well. So just remember that we're here. If you wanna dive into any of this

424

01:37:03.470 --> 01:37:08.409

Stephanie Bogan: awesome. Alright! What questions do you guys have, Kevin? What are your key takeaways? And next steps

425

01:37:09.153 --> 01:37:12.920

Stephanie Bogan: do a quick round table. You've been intently listening. I've seen it.

426

01:37:14.870 --> 01:37:17.579

Kevin Adleman: I'm I'm assuming I'm you're talking to me me.

427

01:37:17.580 --> 01:37:20.799

Stephanie Bogan: Yes, sorry. Yeah, not Kevin Thomas, because I can't see him right now.

428

01:37:20.800 --> 01:37:22.033

Kevin Adleman: Yeah, no, I I mean.

429

01:37:22.280 --> 01:37:24.539

Stephanie Bogan: Jared, you missed it this year. We have a firm

430

01:37:24.670 --> 01:37:28.711

Stephanie Bogan: with 2 Kevin's in the same firm, so I just called them the Kevin's.

431

01:37:29.000 --> 01:37:30.059

Jarrold Musick: Love it.

432

01:37:31.220 --> 01:37:34.091

Kevin Adleman: And it's simple. But no, I think.

433

01:37:34.460 --> 01:37:37.849

Kevin Adleman: these are all things, especially today, just talking about the

434

01:37:37.870 --> 01:37:43.640

Kevin Adleman: the, the routines and and those sort of things that you need to be doing. They're all things that

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01:37:44.400 --> 01:38:07.219

Kevin Adleman: are are so important, but are so easy to to kick away that you've got to be intent, especially when things go a little awry. I was I was actually doing pretty well with all of that. And then the the excuses, you know the sickness that ran through our household. I've kind of gotten off track, and that



2 or 3 weeks kind of it's it's a lot of momentum to try to try to get back. But it's important to to get back on there.

436

01:38:07.220 --> 01:38:14.669

Stephanie Bogan: It is genuinely. That's why you can. If you look at my different success shifters. When things really get cemented, they fall off.

437

01:38:14.790 --> 01:38:27.840

Stephanie Bogan: When I get off routine. And I right. That was my point earlier. When I get out of routine I can always go like I know the answer. I know exactly. So usually, it's really funny. I have this rule of 3. It takes me about 3 days to get the Mojo back

438

01:38:28.110 --> 01:38:37.410

Stephanie Bogan: where I'm like, okay, like day one, I'm like, yeah. Day 2. I'm like, okay, feel, you know, by day. 3. I don't like. My brain's like, Oh, I know what this is like we like this place. Let's do this.

439

01:38:37.620 --> 01:38:55.057

Stephanie Bogan: and within 3 like, if I can keep that up for 3 weeks to like, then it's like it's just completely reset. But I find, like for me, that shift is usually about 3 days, which I find funny, but that's just your yours might be different. But I noticed I'm like, Oh, it's been 3 days since I'm off. Oh, I'm getting refocused.

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01:38:55.340 --> 01:38:59.989

Stephanie Bogan: I'm gonna have to exercise my will willpower works for about 3 days, according to research.

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01:39:00.750 --> 01:39:06.690

Stephanie Bogan: which is what I was like. Oh, imagine that just about that time I'm like, oh, I if I don't do it

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01:39:06.860 --> 01:39:16.509

Stephanie Bogan: right, and I don't have that habit pattern in place. Then I go back to. Then we go to the path of least resistance. And and look if you've got kids, which I do, especially when they're younger.

443

01:39:16.770 --> 01:39:37.409

Stephanie Bogan: It's the hardest thing to do to create routine to Jared's point. That's why we tend to do it early or late. I had a a girlfriend before I had kids, and she was a teacher, and she had 4, and she used to tell the story when get together for barbecues and stuff. How she got up at 4 30 in the morning, and I remember thinking she was batch crazy. I was like who would do that.

444

01:39:37.690 --> 01:39:39.960

Stephanie Bogan: And now I'm like, Oh, I can't

445

01:39:41.370 --> 01:39:58.706

Stephanie Bogan: like it's it's like sacred special time. And again, if an hour is too much to begin with,

remember the win, for your brain is inserting a habit pattern, whether it's, you know, 5 min or 50, because once we've done that, now we can simply expand that

446

01:39:59.180 --> 01:40:23.540

Stephanie Bogan: But yeah, when when kids get sick or you get sick or right, something happens at work or you lose it. Right? I was without an ea for months, like I was up for 2 h in the morning, being my ea right. It was like I had to really figure out like, how do I make sure that I maintain, Jared? You might remember this from one of the sessions last year. Mackenzie, did this really cool research. We'll talk about it later this year around

447

01:40:23.690 --> 01:40:52.920

Stephanie Bogan: what really makes excellent Ceos. But right, they've suggested it just applies to all leadership, right? Whether you're leading a family and nonprofit, or a fortune. 500 company there's 6 different. I was very excited that the secrets to success were all mindsets. There's 6 of them. One of them, very interestingly, is that good leaders are not sharpshooters. They are amazing plate spinners. Really good leaders have a habit of paying attention to each facet of the business.

448

01:40:53.670 --> 01:40:55.359

Stephanie Bogan: I will add in life.

449

01:40:56.100 --> 01:41:25.390

Stephanie Bogan: not just the ones that are easy or the ones they're good at, which is what, hey? I love selling. So I'm gonna focus on growth. And I'm not gonna build the tech and the Ops that I need to make this easy for my team right? I'm just gonna throw right the ducks over the fence and be like I bag right? I killed a new skin. I'm like you could do that. It's not helpful, but you can do that. So this, I think, as we reflect on this quarter, I think to Kevin's point, it's just an opportunity to ask ourselves, Does our personal routine

450

01:41:26.040 --> 01:41:31.009

Stephanie Bogan: position us set us up to be the best version of ourselves?

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01:41:31.250 --> 01:41:39.684

Stephanie Bogan: Certainly with work. But also, I think, Jared and I will tell you all day long. There is no dividing line between who you are at work and who you are at home.

452

01:41:39.980 --> 01:41:42.550

Stephanie Bogan: You are you are. We have modes.

453

01:41:43.080 --> 01:41:50.919

Stephanie Bogan: but ultimately we want to be right happy and high performing in each of those modes, which means we've got to be able to turn the work brain off

454

01:41:51.040 --> 01:42:14.989

Stephanie Bogan: when we get home, not feel the need to check the phone, be able to be present with our families and not be like spinning in our heads about what's waiting for us tomorrow. Which is where those nighttime routines can be really, really helpful. So, Jared, thank you very much for spending your



time with us. I know we'll see you a little bit later in the year. But I'm always so impressed by just the measure and the discipline and the intention that Jared

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01:42:15.150 --> 01:42:29.079

Stephanie Bogan: really consistently shows up with. And I think that's really had an effect on their culture which was a really powerful shift. It certainly had an effect on not just the team, but how they built that team right. He was

456

01:42:29.080 --> 01:42:46.047

Stephanie Bogan: able to see right what his strengths were, where he could benefit from bringing Tiffany in. Tiffany's really good like we. If you spend time with them together as a partnership team, you'll be really impressed. There's a lot of humility and servant leadership and leveraging each other's strengths, and

457

01:42:46.380 --> 01:42:57.059

Stephanie Bogan: I really do attribute that to the fact that they're both very conscious about who they are as humans and who they are as leaders. And I think that very much seeps into the work.

458

01:42:57.090 --> 01:43:03.500

Stephanie Bogan: first into the culture and then into the work they do as a firm. So, Jared, I'm always honored when you spend time with this. Thank you so much.

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01:43:03.765 --> 01:43:13.049

Jarrod Musick: Thanks for having me, Steph, and great to connect with you all. Appreciate you letting me come in for a little bit and look forward to stay, connecting throughout the year with limitless.

460

01:43:13.750 --> 01:43:14.803

Stephanie Bogan: Alright, everybody

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01:43:15.920 --> 01:43:23.220

Stephanie Bogan: team. You guys have any other questions before we let you go from leaders, any questions after last week, any questions about how to implement this

462

01:43:23.410 --> 01:43:27.120

Stephanie Bogan: ready to go. You've got your routines ready, Turbocharge. Sarah.

463

01:43:30.940 --> 01:43:38.870

Stephanie Bogan: Alright. You guys have a great day. Have a fantastic week. We'll be reaching out. If you have any questions. Don't hesitate, Jared. Thank you very much. Again I appreciate it.

