

UPCOMING EVENTS



05.22-24. LEADERS EVEREST EVENT

06.03 PRODUCTIVITY VIRTUAL SUMMIT

UPCOMING COACHING CALLS



04.01 CLIENT PROFITABILITY
with Stephanie & Coach Adam

04.08 OFFICE HOURS
with Stephanie & Coach Natalie



USE ZOOM Q&A FOR TODAY'S QUESTIONS

LEADERS

ACCOUNTABILITY COHORT

MARCH 2024





CLARIFYING
YOUR VISION



CREATING POSITIVE
MINDSET AND HIGH
PERFORMANCE HABITS



PRODUCTIVITY &
ACCOUNTABILITY
SYSTEMS

OUR FOCUS
THIS QUARTER



Jarrod Musick

HIGH-PERFORMANCE HABITS

Hallmarks of Great Morning Routine

#1 Get up Before the Day Starts



Usually between 4:30-6:00 am based on when you need to be available for others



The earlier you leave for the office, start work, or focus on kids the earlier you need to get up.



Plan on 1 hour for body movement/intention setting

#2 A Great Morning Starts The Night Before



Journal – What did you accomplish or learn from that day?



Plan – What are your goals/priorities for the following day?



Prepare – Set out workout clothes and other materials for your first hour

Hallmarks of Great Morning Routine

Hallmarks of Great Morning Routine

#3 Sleep Hygiene

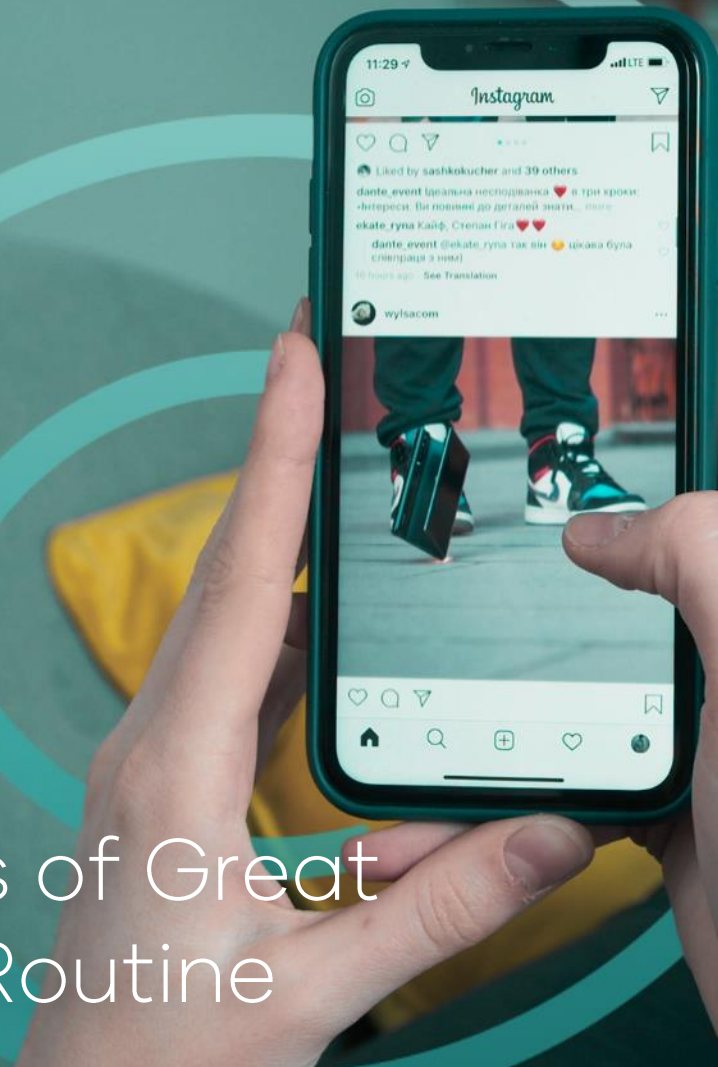


Sunset – At least an hour before your bedtime start lowering light and volume levels. Get your body ready that the day is ending.



Ritual – Something to start your wind down. I use mint tea and quiet time reading or watching TV.

#4 Phone Dominance



Put it away when you get home – On a charger away from use, focus on setting the day down and being present.

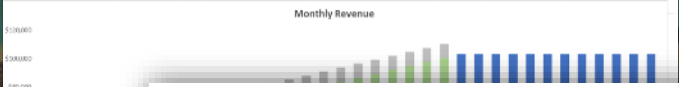


If you need to work more, do that but don't slip into screen scrolling

Hallmarks of Great Morning Routine

Integrated Planning & WEALTH MANAGEMENT

2023												2024												2025											
January	February	March	April	May	June	July	August	September	October	November	December	January	February	March	April	May	June	July	August	September	October	November	December	January	February	March	April	May	June	July	August	September	October	November	December
Revenue Projections																																			
Projecting Monthly Revenue	\$40,000.00																																		
Practice Owner Rate	\$895.00																																		
Non-Practice Owner Rate	\$395.00																																		
Practice Owner Onboarding Fee	\$2,500.00																																		
Non-Practice Owner Onboarding Fee	\$1,900.00																																		
New Clients Gained per Month																																			
Practice Owner	3																																		
Non-Practice Owner	1																																		
Monthly Revenue																																			
Projecting Revenue Stream	\$40,000																																		
New Client Onboarding	\$0																																		
New Client Monthly Payments	\$0																																		
Total	\$40,000																																		
Cumulative Annual Revenue																																			
2023	\$400,000											\$1,000,000											\$1,500,000												
Annual Summary																																			
Projecting Monthly Revenue	\$40,000																																		
Ending Monthly Revenue	\$69,790																																		
Total Annual Revenue	\$751,880																																		



Growth Tracker Dashboard

2023 New MIA: \$41,049,120 by 12/31/23

Prospect Status: 100% of New Clients (100%) by 12/31/23

Qualified Intro: 100% of New Clients (100%) by 12/31/23

Team Member Results: 100% of New Clients (100%) by 12/31/23

Introductions by RD Campaigns: 100% of New Clients (100%) by 12/31/23

Advisor On-Boarding Results: 100% of New Clients (100%) by 12/31/23

COIs per Speciality: 77% Retirement, 16% Women and L.I. case, 7% Trust/Asset Classes, 0% FIRM

Status of COIs: 100% of New Clients (100%) by 12/31/23

Influencers vs. Non-Influencers: 100% of New Clients (100%) by 12/31/23

SOCIAL MEDIA MARKETING REACH

ENGAGEMENT KPIs	January	February	March	April	May	June	July	August	September	October	November	December	Totals & Averages
Engagement Rate	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%
Click-Through Rate	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
Conversion Rate	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%

BUDGET & CPC KPIs	January	February	March	April	May	June	July	August	September	October	November	December	Totals & Averages
Social Advertising Budget	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000	\$120,000
Cost per Click (CPC)	\$1.00	\$1.00	\$1.00	\$1.00	\$1.00	\$1.00	\$1.00	\$1.00	\$1.00	\$1.00	\$1.00	\$1.00	\$1.00

SEMINARS

	January	February	March	April	May	June	July	August	September	October	November	December	Totals & Averages
Firm Hosted Seminars	60	90	100	150	130	140	150	160	130	180	190	200	1730
# Invited	200	300	400	500	600	700	800	900	1000	1100	1200	1300	9300
# RSVPs	150	250	300	450	350	400	450	500	400	550	600	650	5050
# Attendees	1	1	2	1	1	3	2	2	1	2	2	3	21
Conversion Rate	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%
F/U Video Views	20	40	60	80	100	120	140	160	180	200	220	240	1830
Guest to Outside Seminars	50	55	60	120	145	138	156	240	145	250	233	176	1846
# Invited	10	20	30	40	50	60	70	80	90	100	110	120	780
# RSVPs	20	25	30	35	40	45	50	55	60	65	70	75	570
# Attendees	2	4	3	4	5	4	7	2	5	4	5	5	50
Conversion Rate	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%
F/U Video Views	20	30	24	40	60	66	70	110	80	140	98	87	827

*Note: Each chart above contains a fully transparent view element of the bar/KPI chart's primary axis for # Invited (participated to the highest figure) and secondary axis for # Attendees. This is done to ensure transparency and accuracy in reporting.

ELEVATE YOUR EMAIL

SUCCESS SHIFTER

DAILY PRACTICE

One-Page Business Plan
Your Limitless Launch Plan

\$1M REVENUE + 100 DAYS OFF

TAKE 60 DAYS OFF

- Minimize time
- Focus on S.M.A.R.T. goals
- Hit part-time decisions

AUTOMATE WORK-FLOWS

- Build Client Service model
- Create core processes
- Automate workflows

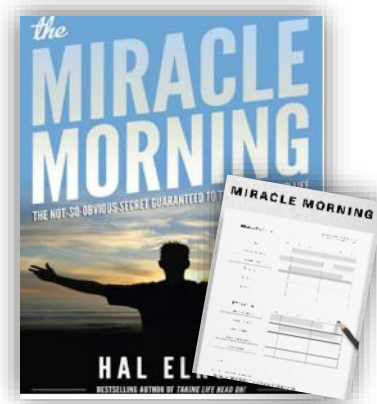
MY BIG WHY

To simplify the process and through ownership simple and efficient processes so that I can create time, opportunities, and great experiences for myself and those people in my life.



CLARIFY YOUR VISION

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



MANAGING STEPHANIE'S EMAIL INBOX

PROBLEMS: Inbox Overflow, Too many folders, Too many emails

ANALYZE THE INBOX PROBLEMS: The goal is to get your inbox organized and to be able to find what you need in 5 minutes or less.

KEY: The goal is to get your inbox organized and to be able to find what you need in 5 minutes or less.

ACTION PLAN: Organize your inbox, delete old emails, create folders for important emails.

DAILY TASKS: Review your inbox, delete old emails, create folders for important emails.



CREATING POSITIVE PERSONAL HABITS

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

Success Shifter

Key Performance Indicators Dashboard

KEY DATA POINTS

Total # of Clients	100
Total # of Professional Leads	100
Total # of Professional Leads	100
Total # of Professional Leads	100

EBDC (Entrepreneurial Development Center) Score

60%

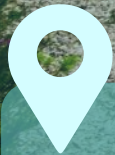


BUILDING ACCOUNTABILITY SYSTEMS

- Success Shifter
- KPI Worksheet

A scenic mountain landscape featuring a wooden walkway with a log railing on the left, a turquoise lake in the middle ground, and forested mountains in the background. The sky is hazy, and the overall scene is peaceful and natural.

WHAT'S ON YOUR NEXT 30 DAYS ACTION LIST



TYPE YOUR NEXT 30 DAYS ACTIONS IN
LEADERS ACCOUNTABILITY GOOGLE SHEET

FEBRUARY ASSIGNMENTS

1
DRAFT
1-PG
PLAN

2
ELEVATE
YOUR
EMAIL

3
FRIDAY
COHORT
CHECK-INS

MANAGING STEPHANIE'S EMAIL INBOX

PROCESS

Process Owner: Executive Assistant
Frequency: Daily

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

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

3-YEAR VISION

1-YEAR GOALS

KEY OBJECTIVES

QUARTERLY PRIORITIES

3-YEAR VISION
\$1M REVENUE + 100 DAYS OFF

1-YEAR GOALS
TAKE 60 DAYS OFF
AUTOMATE WORK-FLOWS
GROW REVENUE 20% to \$600,000

KEY OBJECTIVES
Maximize time
Focus on \$1000/hr RPA
Hire part-time assistant
Build Client Service model
Draft core processes
Automate workflows
Increase Rev per Client to \$6,600
6 new clients from digital marketing
6 referrals

Quarter	Q1	Q2	Q3	Q4		
Q1	<ul style="list-style-type: none"> Implement annual calendar and time blocking Hire Virtual Asst 	<ul style="list-style-type: none"> Define segments services & staffing Hire Redtail consultant 	<ul style="list-style-type: none"> Choose niche Plan & Prep for Q2 podcast launch Re-launch niche to COIs 	<ul style="list-style-type: none"> Implement Calendly 	<ul style="list-style-type: none"> Draft materials Client reviews Client reviews 	<ul style="list-style-type: none"> Fee increase to \$6,600 Google/SEO 24 COI meetings
Q2						
Q3	<ul style="list-style-type: none"> Hire Virtual Paraplanner 	<ul style="list-style-type: none"> New client onboarding New client onboarding 	<ul style="list-style-type: none"> 1,000 downloads 20 digital prospects 			
Q4		<ul style="list-style-type: none"> Prospect process Prospect process 				

THIS IS YOUR Q1 FOCUS

THIS YOU DECIDE EACH SUMMIT (QUARTER)

3-YEAR VISION
\$1M REVENUE + 100 DAYS OFF

1-YEAR GOALS
TAKE 60 DAYS OFF
AUTOMATE WORK-FLOWS
GROW REVENUE 20% to \$600,000

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QUARTERLY PRIORITIES

Q1

- Implement annual calendar and time blocking
- Hire Virtual Asst

Q2

- Define segments services & staffing
- Hire Redtail consultant

Q3

- Choose niche
- Plan & Prep for Q2 podcast launch
- Re-launch niche to COIs

Q4

- Implement Calendly

Q1

- Draft materials
- Client reviews
- Client reviews

Q2

- Fee increase to \$6,600
- Google/SEO
- 24 COI meetings

Q3

- Hire Virtual Paraplanner

Q4

- New client onboarding
- New client onboarding

Q1

- 1,000 downloads
- 20 digital prospects

Q2

- Prospect process
- Prospect process

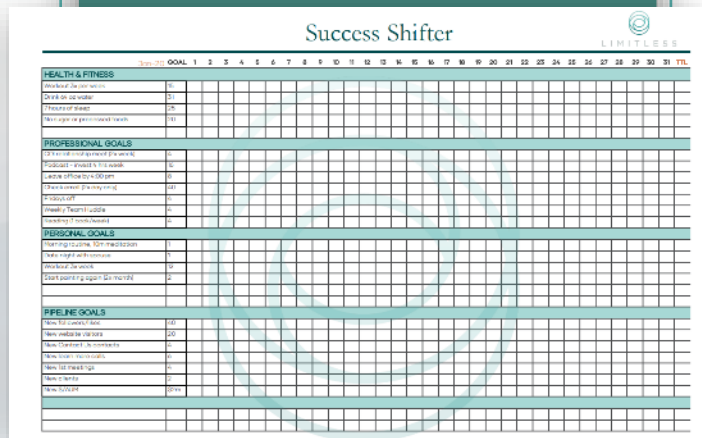
THIS YOU DECIDE EACH SUMMIT (QUARTER)

THIS IS YOUR Q1 FOCUS

MARCH ASSIGNMENTS

1

SUCCESS
SHIFTER



Success Shifter

HEALTH & FITNESS

GOAL	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	TOT.					
Exercise 30 min																																					
Drink 8 glasses																																					
10 mins of sleep																																					
10 mins of personal time																																					

PROFESSIONAL GOALS

GOAL	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	TOT.							
10 min of personal time																																							
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PERSONAL GOALS

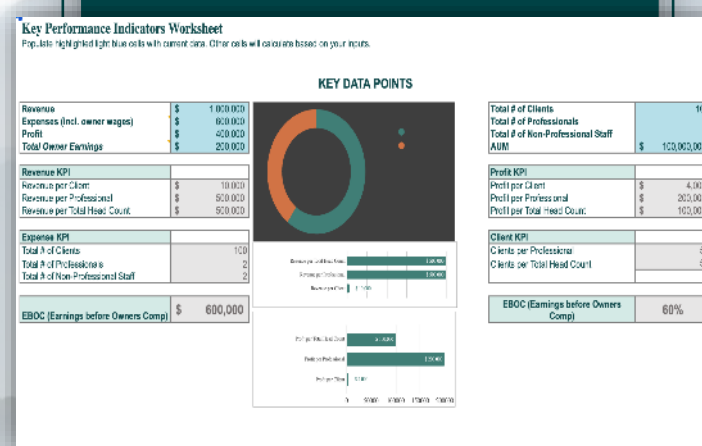
GOAL	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	TOT.								
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PIPELINE GOALS

GOAL	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	TOT.								
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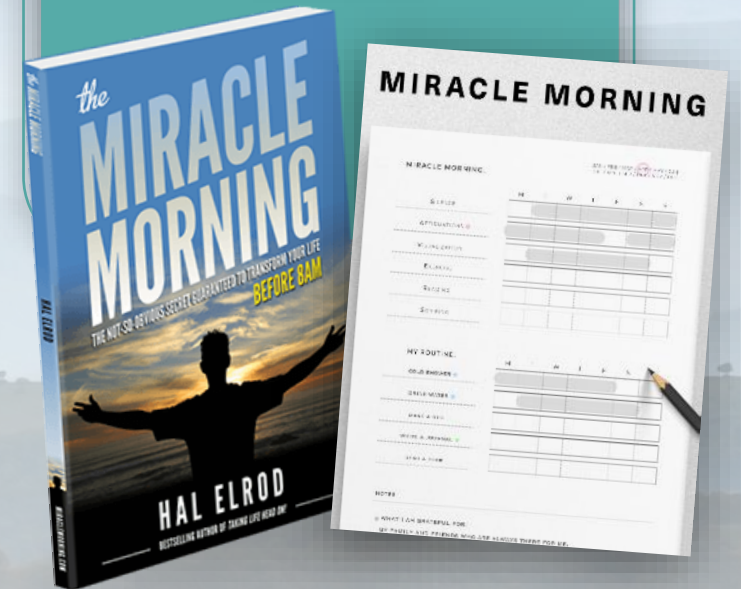
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KPI
WORKSHEET



3

DAILY
PRACTICE



EMAIL LEADERS INBOX OR POST ASSIGNMENTS
ON LEADERS TRIBE FOR FEEDBACK