

LIMITLESS Coaching Call Transcript

July 1st, 2024
Peak Practice
Leaders Coaching Call

Allison Foulk: Natalie, Thanks for joining us. Natalie Bergsma: Thank you. I think it is a little bit serendipitous that today's conversation is about building your entourage so that you're focused on the fewest, most important things in the business that are going to drive growth and revenue and help you build a business in life that you love. And this is a really great example of why, having an entourage is really helpful. Right?

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00:23:25.350 --> 00:23:46.460

Natalie Bergsma: I'm part of Stephanie's entourage. Allison is a part of Stephanie's entourage. So when things happen. You always have someone there to support you right. When you have the right people around you, it allows you to take your hands off the wheel of the business and let other people help you drive it.

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00:23:46.740 --> 00:24:12.149

Natalie Bergsma: So I say, this is a really great example, because I'm here driving the conversation today for the few of you who are here, and everyone else is out on vacation. But it allows you to do things like step away from the business when you need to, whether that's for vacation or because you're having technical difficulties because you're in a major resort hotel. And for some reason they don't have Internet. It's capable of handling this kind of thing.

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00:24:12.280 --> 00:24:21.710

Natalie Bergsma: So that's really the focus of today's conversation is, how do you get the right people and the right team in place, particularly on

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00:24:21.710 --> 00:24:42.510

Natalie Bergsma: your individualized support. We're gonna talk about the different components of an entourage, but really focusing in on the Ea role and how that helps. And that's why Odalise is here today because she's actually gonna share some of the things that she does with Stephanie that helps make Stephanie's life easier. What are the systems and processes

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00:24:42.510 --> 00:25:00.440

Natalie Bergsma: that we've put in place around this role that allows you to create the structure that you need to be able to really do the things and focus. I think a lot of us really think of. You know, the analogy that comes to mind is what happens when we go to a doctor's office

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00:25:00.440 --> 00:25:26.449

Natalie Bergsma: right? We don't get to see the doctor right away. Right 1st we get triage by the front desk. We have to go through right? Someone else is weighing us and taking our vitals and then sitting in



with us and getting a picture of what's going on. And it's only until we get to the meat of that work that we get to see the most critical person on that team. So those are the components that we're really gonna talk about today

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00:25:26.630 --> 00:25:41.980

Natalie Bergsma: is how to shift you out of being the day to day person who's in all of those roles to truly being the leader. Who's really that chief revenue officer? Right? You're focused on growing and developing

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00:25:42.060 --> 00:25:43.779

Natalie Bergsma: the the business.

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00:25:44.020 --> 00:26:01.179

Natalie Bergsma: And so this is what we like to talk about is right. You don't know what you know until you've been through it. So a lot of times when we think about life before having an Ea, it's really about all of the different things that you have to do. You're wearing so many different

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Natalie Bergsma: hats in the organization. Right? You're managing. Hr, you're managing marketing. You're managing clients

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00:26:06.770 --> 00:26:35.180

Natalie Bergsma: right? What are some of the things that you guys are managing that aren't your highest and best use? And it's no wonder you're overwhelmed because you have hundreds of tasks a day when you think about all the things that it takes to run a business. And quite frankly, you're the person who's getting all of that information without an Ea. There's no one there to support you to triage that information.

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00:26:35.370 --> 00:26:40.410

Natalie Bergsma: And so one of the things that we'll often tell ourselves is, we don't have

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00:26:40.470 --> 00:26:50.959

Natalie Bergsma: the time. We don't have the money. I can't find the right person like, I'm curious. What are some of your guys perspectives on what's holding you back

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00:26:51.390 --> 00:26:52.510

Natalie Bergsma: from

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00:26:52.540 --> 00:27:03.420

Natalie Bergsma: taking the leap to building an entourage that truly supports you to let you focus on your highest activities. So I kind of want to hear from you like. Where are you sitting right now?

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00:27:08.820 --> 00:27:10.511

Chris Wedell: I don't mind joining in.



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00:27:11.220 --> 00:27:15.089
Chris Wedell: I I feel like for me. Okay. So I've got this

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00:27:15.150 --> 00:27:26.106
Chris Wedell: great team. And I have this. I know exactly like you know, my next process is moving in my current. Like one of our current admins to becoming a

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00:27:27.746 --> 00:27:30.030
Chris Wedell: you know a servicing advisor.

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00:27:31.055 --> 00:27:31.950
Chris Wedell: And

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00:27:32.460 --> 00:27:39.959
Chris Wedell: I've been doing a lot of like networking with other people in the industry because she's licensed already.

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00:27:40.260 --> 00:27:44.260
Chris Wedell: and has been with our practice for 2 years. But

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00:27:44.430 --> 00:27:51.370
Chris Wedell: like, I don't have the time to train her right, like what I would call just basic

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00:27:51.780 --> 00:28:00.770
Chris Wedell: like. There are things that I just do, because I've been doing this for 18 years that I'm sure I don't even have to think through it, because it's just so like just what I do.

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00:28:01.120 --> 00:28:11.029
Chris Wedell: And so it's hard for me to teach that to somebody, because I'm just not even thinking about it. So I'm like, there's gotta be like a basic like financial advisor training program. That's not a

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00:28:11.550 --> 00:28:23.349
Chris Wedell: hey trained to take this test and pass this exam, or take a Cfp course, or whatever to become a Cfp like, what are just some basic, you know, like, what's out there. Because I I

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00:28:23.440 --> 00:28:34.680
Chris Wedell: feel like that helps move her into the role she wants to be in which will help me find the next person to take her play. You know what I mean. Like to keep that ball moving forward where I can not do as much

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00:28:35.380 --> 00:28:40.459
Chris Wedell: like. I'm already not doing a lot, but, as far as a capacity issue goes, like part of that is

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00:28:40.920 --> 00:28:57.980

Chris Wedell: transitioning her to becoming a service advisor. So I just just I don't know. That's what's holding me back is like, is there something out there? And I got some good information from a woman I met. I had a Zoom Meeting with today. So I'm gonna check that out. She was like, actually, there's a company that does this. So we'll see.

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00:28:58.385 --> 00:29:01.130

Chris Wedell: You know that I'm willing to pay for it.

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00:29:02.460 --> 00:29:03.160

Chris Wedell: Yeah.

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00:29:03.940 --> 00:29:11.560

Natalie Bergsma: I think part of what you're talking about is, I don't have the time. So this conversation around entourage is, how do we create

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00:29:11.620 --> 00:29:14.749

Natalie Bergsma: leverage. Right? One is making the time.

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00:29:15.500 --> 00:29:26.850

Chris Wedell: Yes, I make the time by making her a servicing advisor, so I get that. But I want to make sure she has confidence to become a servicing advisor. So it's, how do I do that?

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00:29:26.970 --> 00:29:27.630

Chris Wedell: Yeah.

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00:29:28.286 --> 00:29:37.160

Natalie Bergsma: And we're gonna talk about that. How do we put those systems and processes in place? But I think, Chris, you're also creating another focus and leverage which is

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Natalie Bergsma: looking outside. Just yourself

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00:29:40.540 --> 00:30:05.920

Natalie Bergsma: for creating those things. So whether that's your Ea a service advisor, a Csa on the team? It's how do we create that leverage for us? Because sometimes we will absolutely get in that cycle which is in order to get the time? I have to have the person, but if I don't have the person, and they're not there yet, then I don't have the time right. And then you just sit in this cycle of.

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00:30:05.920 --> 00:30:22.559

Natalie Bergsma: I'm stuck, and I couldn't quite get there. So that's really where we have to break those barriers around time and start figuring out what's the smallest piece that we can move that needle forward and really start leveraging. And so for you, it sounds like the 1st step is.



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00:30:22.930 --> 00:30:27.609

Natalie Bergsma: I need someone to leverage training. What are the resources for that?

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00:30:28.256 --> 00:30:47.860

Natalie Bergsma: And we can share a couple of those? There's another training program that you can join that I'll share kind of after the the call relative to the service Advisor, but also just focusing on what are the other activities across your entourage? That's really, when we talk about this

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00:30:47.880 --> 00:30:52.729

Natalie Bergsma: entourage concept, we're really talking about 3 different kinds

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00:30:52.770 --> 00:31:17.809

Natalie Bergsma: of leverage. So what you're talking about here is client leverage. Right? How do I basically move out of the practitioner role in my business so that I can focus on the leadership role so that I can drive the growth and development of the company and get out of the day to day of the client work or focus on the highest value. Client work, right that revenue producing activity.

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00:31:18.070 --> 00:31:45.600

Natalie Bergsma: But there's also business leverage. So, depending on where you're at in the organization, right? That might be a business manager or practice manager to help you run the business. So when we talk about this, it's not just thinking about one area where we can create that leverage. It's actually, how do we build this whole team around us. And at what stage do we bring those people in? So right on the business leverage? Right? If you have a practice manager, and they're handling, billing and

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00:31:46.055 --> 00:32:02.410

Natalie Bergsma: operations and all of those components right? That pulls that hat off of your plate. And if we outsource marketing right as you grow right, you can get outsource virtual assistant services, outsource marketing services. Right? All of that leverage gets scaled on the business side.

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00:32:02.640 --> 00:32:31.599

Natalie Bergsma: But what we're really focusing is focusing on today is also that personal leverage. How do you create more personal leverage for yourself in a role like an executive assistant so that you can actually pull more of that \$50 an hour. Work off of your plate so that you can focus in on these other business areas, or even there create more time for training people in those other business areas. So I think that's 1 of the questions I would ask you, Chris, is.

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00:32:31.720 --> 00:32:43.810

Natalie Bergsma: what are you still doing? That might be on the the business side or the personal side that you can create that time and space to spend more time training on the advisory side. Does that make sense.

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00:32:47.680 --> 00:32:49.222

Sara Stanich: Can I? I could jump in.

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Sara Stanich: i

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Sara Stanich: We have a virtual assistant that's more like the operational side of things. Who does client paperwork.

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Sara Stanich: In the past I had a assistant who was kind of like a marketing assistant and help me with things like the Newsletter

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00:33:08.990 --> 00:33:12.429

Sara Stanich: and some blog posts and

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00:33:12.630 --> 00:33:16.179

Sara Stanich: stuff like that. She has left

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00:33:16.782 --> 00:33:28.389

Sara Stanich: but I is still someone I know, and I and has actually offered to like. Oh, if you need any help like, especially this summer like, let me know. And so I

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00:33:28.410 --> 00:33:33.150

Sara Stanich: I'm in contact with her. I trust her. She probably still has, like a live

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00:33:33.280 --> 00:33:44.389

Sara Stanich: email address, like, you know, at my company. So like, I don't know, like, maybe if that some ideas on things ways, I could leverage her. If anyone has any.

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00:33:44.850 --> 00:33:46.119

Sara Stanich: I would be open to that.

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00:33:47.330 --> 00:34:03.100

Sara Stanich: But so but she's she's, you know, a young, capable person. She doesn't. She doesn't want to be a financial advisor, you know, she just basically just kind of like wants to work for me so, or has some extra time right now, and you know, is available.

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00:34:03.617 --> 00:34:09.830

Sara Stanich: So I it wouldn't necessarily be permanent, or full time, or or anything like that. But I feel like

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00:34:09.889 --> 00:34:11.179

Sara Stanich: there's a

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00:34:11.280 --> 00:34:14.070



Sara Stanich: an opportunity there which I don't.

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00:34:14.310 --> 00:34:18.590

Sara Stanich: that maybe this conversation will give me some ideas on how to take advantage of the opportunity.

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00:34:19.429 --> 00:34:20.130

Sara Stanich: Yeah.

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00:34:20.139 --> 00:34:25.159

Natalie Bergsma: Really, it's about, where can we create the leverage across the the organization?

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00:34:25.179 --> 00:34:28.049

Natalie Bergsma: Brian, where where are you guys at here?

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00:34:29.954 --> 00:34:33.199

Ryan Wyatt: Ca, kind of in a unique spot, I'd say I mean.

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00:34:33.339 --> 00:34:34.219

Ryan Wyatt: I think

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00:34:34.739 --> 00:34:36.419

Ryan Wyatt: for me I have.

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00:34:36.649 --> 00:34:43.269

Ryan Wyatt: I mean, this is a good thing. I'll just for lack of better words, too much time. So that kind of allows me to focus on.

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00:34:43.999 --> 00:34:49.059

Ryan Wyatt: you know, a very narrow lane which, once we start our new company here in like 4 weeks.

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00:34:49.613 --> 00:34:51.739

Ryan Wyatt: You know, I'll be able to focus

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00:34:52.129 --> 00:34:54.259

Ryan Wyatt: primarily on business development and then

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00:34:54.749 --> 00:35:05.721

Ryan Wyatt: some just other kind of longer term project stuff like Chris mentioned like advisor training. Because we're gonna you know, we're planning to grow and hire new people underneath us. So I'll be able to focus on that.

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00:35:06.359 --> 00:35:10.709
Ryan Wyatt: we are. We do only have one service

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00:35:10.929 --> 00:35:19.179
Ryan Wyatt: like Csa in the office right now, and and they're pretty much always bogged down at capacity, and at times we can feel that kind of pressure

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00:35:19.209 --> 00:35:22.929
Ryan Wyatt: on us. So we are in the in the process of either

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00:35:23.169 --> 00:35:25.139
Ryan Wyatt: doing, and a virtual

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00:35:25.802 --> 00:35:32.129
Ryan Wyatt: ea, or just hiring kind of like a full time, Csa, and I think where we're at.

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00:35:32.209 --> 00:35:33.589
Ryan Wyatt: And that decision.

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00:35:33.799 --> 00:35:36.359
Ryan Wyatt: like in the decision-making processes.

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00:35:38.009 --> 00:35:42.299
Ryan Wyatt: Wow! Everybody seems to be more

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00:35:43.209 --> 00:35:46.639
Ryan Wyatt: comfortable just hiring somebody full time.

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00:35:46.679 --> 00:35:48.529
Ryan Wyatt: That's in the office

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00:35:48.589 --> 00:35:51.512
Ryan Wyatt: to help with everything rather rather than

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00:35:52.269 --> 00:36:00.629
Ryan Wyatt: work with kind of like a a part time virtual assistant. I think it's a little bit of an extreme way of thinking, but, myself included. I I mean.

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00:36:00.829 --> 00:36:09.509
Ryan Wyatt: I know it's more expensive to do that, but I find a little bit of like peace in mind, and just knowing that they're there, and we can just lean on them whenever we need to.

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00:36:09.609 --> 00:36:11.929

Ryan Wyatt: You know, 40 HA week type of thing.

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00:36:13.009 --> 00:36:15.339

Ryan Wyatt: and you have a little bit more control over there.

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00:36:16.809 --> 00:36:18.099

Ryan Wyatt: I guess. Like

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00:36:19.659 --> 00:36:23.649

Ryan Wyatt: again to Chris's point, like what kind of prior training

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00:36:23.839 --> 00:36:29.429

Ryan Wyatt: they may have had like. If if you're interviewing several people and you know what firms they worked at.

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00:36:29.809 --> 00:36:31.229

Ryan Wyatt: you know

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00:36:31.779 --> 00:36:34.919

Ryan Wyatt: whether they're going to kind of cut it right off the get go or not.

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00:36:35.299 --> 00:36:36.149

Ryan Wyatt: Arm.

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00:36:36.449 --> 00:36:42.359

Ryan Wyatt: So that's kind of just where my heads at we do we do have a need? That's just our thought process so far.

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00:36:43.799 --> 00:36:44.499

Ryan Wyatt: Yeah.

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00:36:44.909 --> 00:36:45.989

Ryan Wyatt: Well, I

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00:36:46.219 --> 00:36:47.249

Ryan Wyatt: go ahead.

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00:36:47.557 --> 00:36:50.939

Liza Martinez: I was gonna chime in for a note for Sarah.

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00:36:51.605 --> 00:36:58.559



Liza Martinez: So I was hired by Stephanie from a platform called Upwork and

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00:36:59.084 --> 00:37:11.890

Liza Martinez: one of the things you know. She hired me specifically to be her Ea. But I do have like this wide array of background skills. And so at 1 point she had asked, This is like, Hey, what else do you know

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00:37:11.890 --> 00:37:39.260

Liza Martinez: to do? So I went ahead, and I sent her like my resume, and like a list of all the different things that I know how to do, and all the different areas that I worked in. So that way, you know, if she can leverage my skills and any other areas she's able to. So I would recommend that if you haven't done so yet, you ask her for a resume or a list of other things that she feels comfortable doing so. Then you can see like, Oh, well, this is probably an area that I need help, and I could probably use her for that.

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00:37:40.770 --> 00:37:41.680

Liza Martinez: Thanks.

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00:37:42.000 --> 00:37:47.200

Natalie Bergsma: I think that's a critical component that we're gonna talk about, which is.

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00:37:47.300 --> 00:38:06.049

Natalie Bergsma: what's that role of your personal assistant. So Ryan is you think about. Is it a Csa slash? Ea? Right? We see that a lot in our industry, right? Because we might not have full capacity for an Ea. We have Csa work, and there's kind of correlation between those responsibilities

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00:38:06.090 --> 00:38:18.499

Natalie Bergsma: or Sarah to your point, like, I know I need leverage and support Chris for you. It's looking at. What are the things that I can let go of? That may give me more time and space on the advisory side

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00:38:18.520 --> 00:38:39.170

Natalie Bergsma: to leverage. And so as we think about the role that Lisa's playing in the business, or that Jenny played for me is really right. She's that boundary keeper. She's the person that's triaging everything for you and keeping you from that external world. When you think about email is a great example.

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00:38:39.340 --> 00:38:45.310

Natalie Bergsma: It's the only place where someone has complete and undeniable access to you without permission.

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00:38:46.280 --> 00:38:51.670

Natalie Bergsma: As long as I have your email address, I can get your time and attention.

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00:38:52.670 --> 00:38:55.610

Natalie Bergsma: and that's open and available to the entire world.



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00:38:56.680 --> 00:39:01.270

Natalie Bergsma: And so part of that function and role of that key assistant

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00:39:01.340 --> 00:39:05.929

Natalie Bergsma: is creating that space and that boundary for you

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00:39:06.200 --> 00:39:20.099

Natalie Bergsma: in the email from office hours. We kind of talked about. This is, that's the person who helps you hold your boundaries. It's hard for us to say no to the client who calls in. It's hard for us to say no to the

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00:39:20.160 --> 00:39:23.780

Natalie Bergsma: person on the outside who wants to spend time with us. And so

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00:39:23.980 --> 00:39:50.569

Natalie Bergsma: we really talk about this concept of accessible versus available when I'm accessible, I'm here, and here's how I can help. But it's on my terms. And that's where Lisa steps in right. Stephanie's time is completely right. There's always someone asking for it. If it's me, it's Alison. It's 1 of the people in the coaching program. It's outside business partners, right? Everyone's trying to suck up that time. Lisa's job is really to

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00:39:50.600 --> 00:39:52.829

Natalie Bergsma: identify all of that

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00:39:53.420 --> 00:40:17.340

Natalie Bergsma: stuff that's coming in. And say, hey? Here's what's important. Here's what gets past the gate. I get to be the gatekeeper. So right, if I'm available, I'm here. I'm at your disposal. You can access me at any point in time that you want. And so that's allowing us to create a structure. So think about it. It's the distinction between being your own chef

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00:40:17.620 --> 00:40:19.389

Natalie Bergsma: and making your own food.

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00:40:19.770 --> 00:40:26.229

Natalie Bergsma: which is, you know, I'm probably gonna eat the Cheeseburger and French fries when I shouldn't versus having a personal chef.

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00:40:26.430 --> 00:40:47.650

Natalie Bergsma: Right? I show up the food shows up on my plate. It's yummy. It's delicious. All the things that I want. It's healthy. It's good for me. It's gonna help me grow and develop better. So think of that role is the role for the business is really focusing you on the things that you really need to be spending your time on

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00:40:48.660 --> 00:40:52.840



Natalie Bergsma: Leanna. How's how's it going in in your business and your role.

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00:40:56.360 --> 00:41:02.189

Liana Poodiack: So things are going pretty good. We have been, of course.

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00:41:02.860 --> 00:41:09.399

Liana Poodiack: you know, planning out our transition our dates keep getting moved back because of our build out.

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00:41:09.600 --> 00:41:14.000

Liana Poodiack: But we're moving forward. Our website is pretty much all developed.

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00:41:14.826 --> 00:41:17.623

Liana Poodiack: I think Travis and I have

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00:41:18.890 --> 00:41:22.950

Liana Poodiack: you know, been working hard on roles, responsibilities.

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00:41:23.872 --> 00:41:28.370

Liana Poodiack: where our current assistant fits into everything. And

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00:41:29.110 --> 00:41:30.090

Liana Poodiack: I think.

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00:41:31.410 --> 00:41:35.270

Liana Poodiack: we're pretty comfortable with how we're going to be moving forward.

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00:41:35.300 --> 00:41:38.469

Liana Poodiack: and then once we're settled, we'll determine whether

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00:41:38.530 --> 00:41:40.830

Liana Poodiack: we're gonna need an additional

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00:41:44.100 --> 00:41:48.059

Liana Poodiack: person, whether that's a part time kind of to help with marketing

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00:41:48.210 --> 00:41:54.389

Liana Poodiack: and some of those other items, or whether it's a full customer service person.

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00:41:56.660 --> 00:42:06.980

Natalie Bergsma: do you all feel like you have the leverage that you need here? Or do you see the benefit of having someone who's going to be that gatekeeper



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00:42:07.110 --> 00:42:10.710

Natalie Bergsma: for you, or like where you've seen success or where you've struggled.

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00:42:11.020 --> 00:42:16.970

Liana Poodiack: Yeah. So one of the things we're we're doing, the way our new tech is being set up is where

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00:42:17.180 --> 00:42:19.829

Liana Poodiack: gonna be able to implement, the one.

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00:42:20.010 --> 00:42:25.859

Liana Poodiack: the one email. So kind of all client emails will come into one email address

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00:42:26.916 --> 00:42:27.713

Liana Poodiack: that.

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00:42:28.750 --> 00:42:33.590

Liana Poodiack: All 3 of us can see it. But Alexis will be the gatekeeper to it. So then.

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00:42:33.650 --> 00:42:38.189

Liana Poodiack: once she goes in and reviews all like client email, she'll then.

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00:42:38.250 --> 00:42:46.530

Liana Poodiack: you know, assign them per se whether it's something I need to deal with or Travis does. And then we'll have separate emails.

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00:42:46.910 --> 00:42:53.870

Liana Poodiack: for people when they're coming in from the website. So prospects will come into another email address

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00:42:54.140 --> 00:42:59.700

Liana Poodiack: and the same for vendors. So we'll have a separate email address for vendors to email into.

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00:42:59.920 --> 00:43:05.519

Liana Poodiack: So we're kind of gonna segregate it that way to hopefully make it a little easier to weed out

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00:43:05.860 --> 00:43:08.540

Liana Poodiack: stuff that we don't need to be seeing.

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00:43:09.420 --> 00:43:10.040
Liana Poodiack: Yeah.

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00:43:10.040 --> 00:43:10.734
Natalie Bergsma: Triaging.

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00:43:11.666 --> 00:43:12.140
Liana Poodiack: With it.

453
00:43:12.140 --> 00:43:15.060
Natalie Bergsma: Yeah, triaging those non priority items and kind of.

454
00:43:16.270 --> 00:43:24.400
Natalie Bergsma: Lisa, can you talk a little bit about what you're doing there for Steph as the gatekeeper, and how that's allowing her to kind of focus

455
00:43:24.440 --> 00:43:27.640
Natalie Bergsma: her time. So we can get kind of a tactical perspective of this.

456
00:43:27.910 --> 00:43:38.150
Liza Martinez: Yeah, absolutely. So. In what I do for Stephanie is, I manage her inbox. We have like several ways that we communicate. So we have

457
00:43:38.170 --> 00:44:02.890
Liza Martinez: just some rules in place. She's already set up, and I was able to come in. She showed me the rules, and now we can live by those rules. So she has like a process for her inbox. She has a process for communicating through Asana, which is like the main platform for essentially our Crm. And so I utilize those tools to make sure that I'm guarding her time as fast as possible.

458
00:44:04.170 --> 00:44:04.840
Liza Martinez: Yeah.

459
00:44:05.380 --> 00:44:12.150
Natalie Bergsma: And I think, Ryan, to your point, which we'll talk about a little bit, which is, as we build out this entourage.

460
00:44:12.160 --> 00:44:26.059
Natalie Bergsma: What are the actual needs of the organization. And how do we determine that? So I hear this conversation every time from advisors? Right? I want someone in the office. I need someone sitting in the desk.

461
00:44:26.150 --> 00:44:39.759
Natalie Bergsma: I you know I really need them to be here. It needs to be a full time position, and what that often boils down to is, I'm not going to do it, or I'm not going to do it now, right? So we push that



higher out

462

00:44:39.970 --> 00:44:53.169

Natalie Bergsma: farther and farther, because we're sort of waiting to get to the point where we have capacity for a full time person versus bringing that in. So I want you all to think about. If I could get back, Chris, if you could get back 5 h

463

00:44:53.280 --> 00:44:54.460

Natalie Bergsma: of your week

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00:44:55.340 --> 00:44:58.970

Natalie Bergsma: by leveraging an Ea or a personal assistant.

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00:44:59.070 --> 00:45:00.870

Natalie Bergsma: where could you spend that time?

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00:45:06.510 --> 00:45:08.435

Chris Wedell: I mean, I'd be out

467

00:45:09.180 --> 00:45:16.340

Chris Wedell: prospecting for advisors to join Belair, and coming up with a content for events for my women's events, I do.

468

00:45:17.430 --> 00:45:22.230

Natalie Bergsma: And maybe spending time training that service advisor right? Right? Creating that leverage.

469

00:45:22.230 --> 00:45:27.194

Chris Wedell: I still don't think that's the best use of my time is training somebody. I feel like I can pay for that.

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00:45:27.820 --> 00:45:36.229

Natalie Bergsma: I can't argue with. You can train technical expertise, but they can't train on the way that you do things.

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00:45:36.230 --> 00:45:37.130

Chris Wedell: Oh, sure!

472

00:45:37.130 --> 00:46:00.689

Natalie Bergsma: Right? So that's the question. That is a leverage point right? If you're not the best person to hire, manage, and train, think about your entourage, who in your business is going to be the best person to do that hiring, managing, and training versus you kind of taking on that particular role. So I think that's that combination of what? What's external training resources.



473

00:46:01.067 --> 00:46:12.399

Natalie Bergsma: that we have versus what we need? And how do we train on our systems and processes in the organization cause. It's never quite the same from business to business.

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00:46:12.400 --> 00:46:22.540

Chris Wedell: No, I agree with that. I mean, I know we have our way, and I don't mind training that I I'm looking for more resources on like just the basics, foundational

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00:46:22.590 --> 00:46:23.600

Chris Wedell: knowledge.

476

00:46:24.900 --> 00:46:29.980

Sara Stanich: I feel like our main for what it's worth. I feel like our main training has just been like

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00:46:30.330 --> 00:46:40.819

Sara Stanich: shadowing, you know, like having, like the first, st like the other person, just like in the meeting. So it, you know, just sort of gradually becomes their job over time.

478

00:46:40.820 --> 00:46:43.390

Chris Wedell: And she's been doing that, and I think like, for sure.

479

00:46:43.390 --> 00:46:45.589

Sara Stanich: Figured she's probably been doing that for a year already. Yeah.

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00:46:45.590 --> 00:47:04.350

Chris Wedell: Yeah. And I'm like, Okay, is that enough? Like, you know what I mean, like out here in St. Louis, like Edward Jones is, you know, everywhere. And we all know, like they have just a fantastic training program, right? Like anybody that goes through training at Edward Jones like it's that. But then.

481

00:47:04.590 --> 00:47:05.790

Chris Wedell: you know, any

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00:47:05.950 --> 00:47:22.360

Chris Wedell: and the really good ones decide to go independent. Right so. But I'm like, Oh, like, what is that like? Why does everybody talk about their training program being so good. Like, I'm not talking about like knocking on doors and cult making phone calls to build a business like there is some certain like foundational knowledge.

483

00:47:22.740 --> 00:47:32.439

Chris Wedell: You know what I mean like, I just wanna make sure I'm not missing the basics by having her sit in on meetings that I don't know are too basic for me to even think to tell her.

484

00:47:32.830 --> 00:47:33.690



Chris Wedell: That's all.

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00:47:34.270 --> 00:47:35.060

Chris Wedell: Yeah.

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00:47:35.250 --> 00:47:40.322

Natalie Bergsma: Well, and I think one of those questions, whether it's your service, your advisor, or your Ea, which is.

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00:47:40.920 --> 00:48:03.590

Natalie Bergsma: how much control are you having over that relationship? Right? Are you giving them enough room to swim? Or are you still holding on to all of the ring? So when I think about the Eva role as an example where I often see it go sideways is if we don't have systems and structures and process in place, we never really let go.

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00:48:03.590 --> 00:48:12.399

Natalie Bergsma: Which means Lisa never really gets to do her job to its fullest. Where, you know, if I'm still in my email checking my email and prioritizing my email

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00:48:12.510 --> 00:48:25.009

Natalie Bergsma: ahead of my assistant. I might as well not have an assistant, because I'm taking over that job for them. So whether it's your Ea or your service advisor. It's making sure that you're letting them do the reps

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00:48:25.130 --> 00:48:48.439

Natalie Bergsma: right. Are they doing the work in advance of the call? Are you having them have that conversation in the meetings. And yes, leveraging outside training and resources is really helpful. But I also want to think about your role in this process, which is to be the leader, not the doer. And how can you kind of step out of the doing

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00:48:48.900 --> 00:49:09.360

Natalie Bergsma: more frequently, whether it's checking your email or scheduling or preparing for a client meeting or doing the analysis right? You then become the reviewer and the like, hey? Until you're you know, level 2. We're gonna move from here, but really pushing them beyond that. And I think also

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00:49:09.360 --> 00:49:19.849

Natalie Bergsma: making sure that you have the right people in the right seat. So if they're if they've been in that role for a long time, and they're shadowing, and they're not taking on responsibility.

493

00:49:19.850 --> 00:49:28.249

Natalie Bergsma: Right? What's the conversation to have there which is like, what do they need to feel more comfortable and confident in their role?

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00:49:28.540 --> 00:49:35.560

Natalie Bergsma: But I think about that's really deciding. How do we create that leverage right? Do we



outsource

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00:49:35.720 --> 00:49:43.380

Natalie Bergsma: and hire a part? Time contractor right? Even creating that 5 HA week? Chris, if you could say, Hey, if I could just get an assistant for 5 HA week.

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00:49:43.400 --> 00:49:46.239

Natalie Bergsma: I can focus on these other things.

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00:49:46.270 --> 00:49:50.040

Natalie Bergsma: and then that creates more space for me.

498

00:49:50.380 --> 00:50:03.829

Natalie Bergsma: So I think we're also very hesitant to do virtual. We want to see people, particularly in this role, Ryan, where it's like, Hey, this is my trusted, confident like this is my my partner. Right like this is the person who's gonna hold my life

499

00:50:03.840 --> 00:50:05.859

Natalie Bergsma: in their hands.

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00:50:05.870 --> 00:50:09.420

Natalie Bergsma: And I want to be able to kind of see and touch and feel them.

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00:50:09.690 --> 00:50:12.169

Natalie Bergsma: and the distinction I can share with you is

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00:50:12.620 --> 00:50:15.220

Natalie Bergsma: you're limiting your pool

503

00:50:15.830 --> 00:50:18.219

Natalie Bergsma: of capable, competent people

504

00:50:18.350 --> 00:50:22.330

Natalie Bergsma: by only looking in your area. So if you

505

00:50:22.740 --> 00:50:48.830

Natalie Bergsma: are in a very big metropolitan area, and there's a lot of talent and a lot of resources, I would say, absolutely, just look at local. That's okay. If it's something that you feel really, really strongly about. But if you're looking for 5 to 10 HA week, if you wanna open up your pool like as an example, I just did 2 hiring projects for clients. One was local, only, the other was fully remote.

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00:50:48.870 --> 00:50:52.930

Natalie Bergsma: I had over a thousand candidates for the fully remote position.



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00:50:54.720 --> 00:50:57.900

Natalie Bergsma: We spent 6 months trying to find a local person.

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00:50:57.970 --> 00:51:01.120

Natalie Bergsma: So the difference between a new person in 6 weeks

509

00:51:01.130 --> 00:51:03.790

Natalie Bergsma: and a new person in 6 months.

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00:51:04.400 --> 00:51:19.700

Natalie Bergsma: because the candidate pool between those things was extraordinarily different. So one of the things that if you're looking at hiring and leveraging, I would say, is, if you're absolutely set on local Ryan, what are the real reasons that you need that

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00:51:19.990 --> 00:51:23.050

Natalie Bergsma: because it's not that they need to sit in my office.

512

00:51:25.870 --> 00:51:29.398

Ryan Wyatt: Yeah, I think it's just I I think it's just the the need.

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00:51:30.060 --> 00:51:31.250

Ryan Wyatt: it. I

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00:51:31.940 --> 00:51:33.420

Ryan Wyatt: I know we're talking about like

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00:51:34.070 --> 00:51:37.910

Ryan Wyatt: Ea executive assistant right now. But like our needs, more

516

00:51:38.610 --> 00:51:40.999

Ryan Wyatt: like involved than that.

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00:51:41.120 --> 00:51:43.860

Ryan Wyatt: it's more industry

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00:51:44.050 --> 00:51:46.550

Ryan Wyatt: focus, like so Csa type

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00:51:46.720 --> 00:51:57.229

Ryan Wyatt: stuff. So somebody that might come from like a working in a branch at like a Schwab or Fidelity, or is something is something like that. And



520
00:51:57.330 --> 00:51:59.480
Ryan Wyatt: I fully agree it's it'd be

521
00:51:59.700 --> 00:52:03.029
Ryan Wyatt: just smaller Canada pool, and you look local, but

522
00:52:03.501 --> 00:52:08.799
Ryan Wyatt: ideally, that person would be there to if they have to step in on a meeting.

523
00:52:09.460 --> 00:52:11.359
Ryan Wyatt: Do a little bit more than

524
00:52:12.130 --> 00:52:13.580
Ryan Wyatt: just kind of like.

525
00:52:14.230 --> 00:52:15.290
Ryan Wyatt: Run

526
00:52:15.610 --> 00:52:21.080
Ryan Wyatt: my person like my my scheduling kind of day to day, more of like client related

527
00:52:21.100 --> 00:52:23.129
Ryan Wyatt: service work. If you will.

528
00:52:23.685 --> 00:52:29.920
Natalie Bergsma: Yeah, so I think that comes back to how do we design the role right

529
00:52:30.140 --> 00:52:39.330
Natalie Bergsma: in the business that you have so if you're looking at needing both an Ea Csa, right?
You're combining 2 distinct

530
00:52:39.400 --> 00:52:49.050
Natalie Bergsma: skill sets and personalities, and then you really have to look at hiring the right person.
So when you think about like that Csa work, it's routine. Run the shop

531
00:52:49.521 --> 00:52:54.159
Natalie Bergsma: right drive process. When you think about an Ea role, it's

532
00:52:54.850 --> 00:53:17.839
Natalie Bergsma: help me spin all the plates in the business, right? What's happening over here? What's
happening over here? Right? All of those things, and triaging and take them off your plate. So just as



you're doing that hiring process really focus on what the role is and what the skills are as you build up that entourage. And then, as you look to hire, if you do decide to do something like full time and local.

533

00:53:18.360 --> 00:53:41.720

Natalie Bergsma: then look at the Candidate Pool that's coming in, and don't. Don't hire the wrong person simply because you want local. So that's part of this conversation is when we're finding the right person. We want to make sure that we're pulling all the right levers in front of that, and there's not a 1 size fits all. But making sure that you're really focused on what it is that you need

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00:53:41.720 --> 00:53:51.630

Natalie Bergsma: to get the job done and finding the best person to fill that role. And so there's lots of options for that and succeeding. How do we do that? And that really starts with

535

00:53:52.000 --> 00:54:04.969

Natalie Bergsma: figuring out where you want to spend your time and what that position is going to help you with. So you guys have seen this activity a lot right? Aligning your time and energy. What's above the line for you? What's below the line

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00:54:05.080 --> 00:54:11.759

Natalie Bergsma: for you, and then figuring out, how do I delegate those tasks out? But also looking at how much time is it taking me

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00:54:11.860 --> 00:54:14.349

Natalie Bergsma: right? I don't think we're ever really realistic

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00:54:14.480 --> 00:54:19.410

Natalie Bergsma: at how much time something takes. Like, if you just track how much time you spend an email.

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00:54:19.460 --> 00:54:34.969

Natalie Bergsma: you're going to realize that. Oh, I'm spending an hour a day, 5 days a week at a minimum, on something that I could have right? Someone else help triage and have me focus really on those activities.

540

00:54:35.330 --> 00:54:40.669

Natalie Bergsma: How many of you have gone through this exercise and gotten clarity around where you can

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00:54:40.780 --> 00:54:43.440

Natalie Bergsma: create that leverage for yourself?

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00:54:54.550 --> 00:54:55.560

Ryan Wyatt: I have not.

543



00:54:55.960 --> 00:54:56.740
Natalie Bergsma: F. Knock.

544

00:54:58.100 --> 00:55:01.169

Natalie Bergsma: Sarah, what about you? You had someone you don't have them.

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00:55:05.280 --> 00:55:11.609

Sara Stanich: I've taken steps. I've I've like definitely some of the audi. The obvious things are off my plate.

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00:55:12.406 --> 00:55:15.339

Sara Stanich: And you know things like

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00:55:16.160 --> 00:55:22.010

Sara Stanich: we have. We have a group email. You know, it's kind. It's kind of hard to get on my schedule unless you know me.

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00:55:22.407 --> 00:55:33.530

Sara Stanich: I don't have it on the website anymore. And you know, I've definitely done some some of the obvious things like, we've got this virtual assistant. But you know, I do think that

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00:55:34.050 --> 00:55:36.450

Sara Stanich: you know there's still like another level

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00:55:36.690 --> 00:55:38.550

Sara Stanich: that that it could.

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00:55:39.110 --> 00:55:41.079

Sara Stanich: you know, be more efficient.

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00:55:44.160 --> 00:55:47.059

Sara Stanich: But sometimes, you know, things like a schedule. It's like

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00:55:48.510 --> 00:55:55.000

Sara Stanich: it's, you know. It almost seems more efficient to just do it myself. So I guess I guess I'm I'm in there, too.

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00:55:56.540 --> 00:56:18.819

Natalie Bergsma: Yeah, I. And I can see that right? Because if you don't have, and we're gonna talk a little bit more about like the the systems and processes that we put around this kind of role. But if you don't have those in place, then that person's not learning to think the way that you think right? So that's 1 of the number one jobs of this role is really to be able to

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00:56:18.820 --> 00:56:42.860

Natalie Bergsma: see what's coming in review. It, assess it and prioritize it. So I think that distinction is when we think of bringing in an assistant in. Often we look at the role as being an administrative assistant. Right? I do the filing, I prep the paperwork. I schedule meetings. I greet clients at the door. What we're talking about is a position that's leveraged above that right? This person really is

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00:56:42.860 --> 00:56:49.220

Natalie Bergsma: your right hand pulling things off of your plate that don't need to be there.

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00:56:49.480 --> 00:57:04.060

Natalie Bergsma: And so if we think about, hey? What are all the reasons that we don't do this? Why can't? Why would we want to take the time to go through that exercise and look at the below the line activity, right? Because in the moment when we're in the thick of it.

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00:57:04.080 --> 00:57:07.060

Natalie Bergsma: we absolutely don't think about what the cost is.

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00:57:08.230 --> 00:57:26.870

Natalie Bergsma: we tell ourselves like, Hey, I'll just do that thing, or I'll just check my email, or I'll just schedule that that call like it'll be faster for me to do it. But if we think about the math behind the value of your time, right? If we're spending 2 HA day, 5 days, a week.

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00:57:26.930 --> 00:57:30.170

Natalie Bergsma: 10 HA week on below the line activity.

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00:57:30.550 --> 00:57:44.309

Natalie Bergsma: If you think about. If I could spend 10 HA week to your point, Chris, on generating one new client. It's probably around the amount of time it takes for you to do that. 48 weeks a year that could be 48 new clients a year.

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00:57:44.420 --> 00:57:49.220

Natalie Bergsma: If my average revenue per client is 7,000, that's \$300,000 a year.

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00:57:49.510 --> 00:57:54.809

Natalie Bergsma: If I take that times the lifetime value of the client over 20 years.

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00:57:54.910 --> 00:57:56.800

Natalie Bergsma: We're talking millions of dollars.

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00:57:56.950 --> 00:58:05.550

Natalie Bergsma: So maybe it's not 2 HA day. Maybe it's 1 HA day. Maybe the numbers are a little bit different for you, but that's the cost

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00:58:06.770 --> 00:58:10.810



Natalie Bergsma: of you spending your time on \$50 an hour. Work

567

00:58:11.340 --> 00:58:20.229

Natalie Bergsma: is that you don't get to spend your time on \$1,000 an hour work the things that actually grow and drive the business.

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00:58:20.480 --> 00:58:49.060

Natalie Bergsma: And I think what I can tell you is is like, I'm in the middle of a staff transition. I move from having just any Ops person to bringing in someone who has a hybrid role. So right now, and Steph's been in this position before I'm taking on that time and that responsibility, and now I can feel the pinch right like. Oh, I'm spending time on \$50 an hour work when I could be spending it with clients and growing the business. So it's really about understanding

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00:58:49.060 --> 00:59:04.289

Natalie Bergsma: what that leverage is. And how do you get to that place? So to your point, Brian, if you're looking at bringing in that person, how can they support both roles in the organization for you? Or how do you create more leverage

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00:59:04.340 --> 00:59:05.160

Natalie Bergsma: there?

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00:59:07.680 --> 00:59:28.109

Natalie Bergsma: When we look at the role, we always talk about baselining compensation. So whether it's an administrative assistant, an Ea. A service advisor, right? Getting a baseline, for what compensation should be? How do I make sure I align compensation to the role? So these are just some examples of that.

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00:59:28.810 --> 00:59:34.539

Natalie Bergsma: But I want to pause here. And talk a little bit about what we call kind of

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00:59:34.610 --> 00:59:50.882

Natalie Bergsma: the dynamic duo. Right? You having a right hand that supports you. Right? This is the robin to you being the batman. Right? Someone who's taking out all of the other bad guys while you focus on the joker, so to speak.

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00:59:51.610 --> 00:59:58.130

Natalie Bergsma: Lisa, do you want to kind of talk about the dynamic between you and Steph, and based on, like what you've heard everyone share like

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00:59:58.170 --> 01:00:05.679

Natalie Bergsma: what you're taking on or taking off of her plate relative to the context of this conversation.

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01:00:06.500 --> 01:00:15.064

Liza Martinez: Yes, absolutely. So. I don't mind if you go to the next slide. Cause I'm probably gonna

touch on all this, so some of it may sound repetitive.

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01:00:15.703 --> 01:00:39.759

Liza Martinez: So one of the things has been super helpful is that she's already established a system. So she's got like these. An Sch which is an Sd. Stands for stuff daily huddle. So this is when both me and her get together every day for like 30 min to just go through really quick all the outstanding items. So it's everything that just kind of stays outstanding that

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01:00:40.090 --> 01:00:59.979

Liza Martinez: I haven't been able to figure out on my own, or that I need a little bit more clarification. Just need a little bit more to go on to take it to the final end, or if it's something that she would need to take care of in addition to that, we have a whole standard operating procedure, for how do we manage for inbox and processing all the emails.

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01:01:00.250 --> 01:01:29.580

Liza Martinez: So in the beginning it was a lot of shadowing, like one of you guys said so. At the beginning I was shadowing a little bit of you know what email she was looking at, what she needs to touch, what she doesn't need to touch. And then from there again. We have these rules set in place on, where does each email go? So there's going to be emails that I process myself. And then there's emails that she definitely needs to work on, and those that have a special inbox for her to review. So

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01:01:29.800 --> 01:01:42.359

Liza Martinez: I'm cutting down her email from like, maybe she'll get, and I'm constantly in there. So we have this process where I'm processing emails 3 times a day in the morning, afternoon. And then before the end of the day.

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01:01:42.650 --> 01:02:12.259

Liza Martinez: And so but I would say she's probably getting anywhere between 50 emails and out of the 50 emails. And this is rough estimate. It very varies by the day. But out of the 50 emails, probably 10 make it into her inbox that she actually needs to touch, and then the rest things that I can take care for her saving her time in that regards. Then we use a Sauna, too. So a lot of those emails that come in that do need that second step that needs to be processed in a sauna. I carry those over there.

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01:02:12.983 --> 01:02:35.149

Liza Martinez: And I, and with all these systems that she has in place, it helps build accountability and just keeps an open line of communication, because through Asana, which is our crm, essentially, I can communicate to her like every time I add something in there, I can send her a message. Say, hey, I added, this and process this same thing via email and same thing during Ssh, as well.

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01:02:35.720 --> 01:02:36.310

Natalie Bergsma: Hmm.

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01:02:37.520 --> 01:02:55.569

Natalie Bergsma: yeah. And whether or not it's your Ea or any of the roles like having those systems and structures in place. Here's how we communicate. Here's how we train. Here are the standards that we have. So if you think of Csa or the service advisor roles, it's what's our turnaround time.



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01:02:55.924 --> 01:03:20.639

Natalie Bergsma: How do we respond to emails? Right? When you think about combining that role in an advisory practice? One of the things the Csa slash Ea often does is triage is all the non advisory work off of your plate, like Leanna was talking about. Right? We have a centralized email, and that person is that 1st line of defense in triaging, hey? I need money movement, or I need time with Ryan or

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01:03:20.983 --> 01:03:32.999

Natalie Bergsma: Sarah, you know. Can you meet with this wholesaler on Friday, right? We really don't want to be doing that work. So that position really pulls all the non advisory work. Also off Advisors place.

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01:03:33.000 --> 01:03:56.239

Natalie Bergsma: Whether it's just you or right, you and your service advisors. Right? And so by using your Crm workflows and processes, that's all a part of that training procedure right? And it takes intention and time to get there so that shadow training. But making sure that that's accountability system, we're putting this, I'm putting this in place for a firm, because, you know.

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01:03:56.450 --> 01:03:58.200

Natalie Bergsma: we love to say that you know.

589

01:03:58.370 --> 01:04:23.570

Natalie Bergsma: advisors have shiny object syndrome most of the time. Right? You have so many things to focus on in the business feature that Steph does that right. She's always got a new idea or something else that she wants to be focusing on our job is really to keep her focused on those important things so that she can have space to do that, that new work. And so by having these structures in place, it allows us to sit down with them and say, Okay, hey?

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01:04:23.660 --> 01:04:42.569

Natalie Bergsma: You know who's on first? st What's on? Second, what's on? 3, rd how do I help move the balls along for you? How do I pull things away from you so that you have the time and energy to focus on those other things. But here's the hard part you guys have to 1st sit down and figure out what you don't want to be spending your time on

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01:04:46.860 --> 01:04:56.719

Natalie Bergsma: which means figuring out where that you can create that time to be able to put these kind of systems and processes and people in place.

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01:04:57.280 --> 01:05:04.280

Natalie Bergsma: And so I think of the analogy around time, or the mind side behind it is, is we always hear the I don't have time.

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01:05:04.960 --> 01:05:12.490

Natalie Bergsma: and I don't have enough time to do X. But if I think of my kids an example, if my kid comes to me and says, Hey, mom, can you play with me.

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01:05:12.670 --> 01:05:17.740

Natalie Bergsma: and I'm in the middle of doing my work. My answer is going to be like, I'm really sorry I'm busy. I don't have enough time.

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01:05:19.270 --> 01:05:23.830

Natalie Bergsma: But if my kid comes to me and says, Hey, my brother got hit by a car.

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01:05:24.340 --> 01:05:27.130

Natalie Bergsma: I'm never going to say I don't have enough time

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01:05:27.970 --> 01:05:48.009

Natalie Bergsma: right? So it's really not about not having the time. It's about not prioritizing. That right playing with you is not as big a priority is. Maybe you know, helping my kid who's been injured. So we keep telling ourselves that we don't have enough time. But if you take that just little bit time and create it.

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01:05:48.010 --> 01:06:02.990

Natalie Bergsma: You're going to have what I call a time multiplier, which is, if I take the time to train someone to do the work. I get back my time 10 fold in results. I'm actually multiplying my time and the value of it. And so.

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01:06:03.020 --> 01:06:09.669

Natalie Bergsma: taking the time to put these things in place is a critical component of making that system really work

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01:06:09.910 --> 01:06:10.840

Natalie Bergsma: for you.

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01:06:11.140 --> 01:06:29.659

Natalie Bergsma: And so when we think about what are the places that we can spend it, right? Time is number one, right? Scheduling, prioritizing, helping you triage work. We're going to show you in a little bit, actually helping plan your work so that you just show up and do the work so that you don't have to think

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01:06:29.740 --> 01:06:53.910

Natalie Bergsma: about it right, not just scheduling your calls in your meetings. But what are the things that you need to work on. So that's something that Lisa does for Steph, because we have the system and structure in place. She's able to do that to say, Hey, I'm going to put this in this block, and I'm going to move this time for you. And then there's that work on the business stuff. What's the administrative work in the business that you can pass off

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01:06:53.970 --> 01:06:58.549

Natalie Bergsma: to someone to create time and leverage for you to work in those other places.

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01:07:01.440 --> 01:07:05.620



Natalie Bergsma: and I think this is really the the hardest part, which is

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01:07:05.760 --> 01:07:15.849

Natalie Bergsma: when you get to the point where you're stepping out of practitioner where you're just doing the work, or you're just running the business, and you're stepping into the role

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01:07:15.950 --> 01:07:19.720

Natalie Bergsma: of leader, right into the head of that entourage.

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01:07:20.030 --> 01:07:23.229

Natalie Bergsma: You aren't a tactician specialist.

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01:07:23.300 --> 01:07:30.109

Natalie Bergsma: Your role in the organization is to make sure that all of the plates are spinning and spinning well.

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01:07:30.240 --> 01:07:44.340

Natalie Bergsma: and so having someone to support you and all of the administrative things that goes with that really allows you to make sure that you're focused on training, managing and growing your team. So at least I want you to talk a little bit about

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01:07:44.340 --> 01:08:04.140

Natalie Bergsma: how this has gone for you, and where you sort of see the next the next level, because I think that's always the hardest pieces. Where do we start in terms of letting go of this work? And then how do we get to the point where we truly have what I call a chief of staff role. Right? We go from, hey? I have an admin who supports scheduling

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01:08:04.140 --> 01:08:21.419

Natalie Bergsma: and administrative work to having an executive assistant who starts to truly triage and prioritize your life and really be the gatekeeper to having a chief of staff who basically runs things with you so that you can focus on your highest value activities.

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01:08:22.729 --> 01:08:43.010

Liza Martinez: Yeah, so as great as it would be to have somebody come in and just take over your life when it comes to those little things that you probably don't wanna be touching it's definitely helps to have boundaries and and rules in place and stuff has taken the time to create those. And so

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01:08:43.429 --> 01:08:50.579

Liza Martinez: One thing that I found very helpful in working with Stephanie. I've never worked with anybody like her

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01:08:50.819 --> 01:08:58.706

Liza Martinez: a very unique, very militarized, and her way of thinking, which is very helpful. And

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01:08:59.619 --> 01:09:03.269

Liza Martinez: you know, she again, she has a system for everything. So

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01:09:03.369 --> 01:09:17.672

Liza Martinez: how things go in Asana, how files get named, how just stuff get put in the schedule? And so in my short time, I've learned she operates this way because this is how you optimize

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01:09:18.599 --> 01:09:30.295

Liza Martinez: and every organization has that consistent excellence has a standard process for it. So this is what we have in place. Sort of not sort of this is what we have in place.

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01:09:30.729 --> 01:09:56.929

Liza Martinez: So these here are what she has in her calendar. So every time I need to schedule something. So first, st she has 2 schedules. One schedule is a grayed out schedule is free, and it this is her I'm blanking out on the name, the model schedule. So she's already gone in and decided at the beginning of the year. Okay, so this, how many time or hours that you dedicate to Xyz.

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01:09:56.959 --> 01:10:10.695

Liza Martinez: So she's already in there. So the great part that you see here that's what that is. So now I come in and all that if there's somebody that's trying to schedule a call I already know when I can schedule that call for because she's given me this guide.

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01:10:11.294 --> 01:10:32.689

Liza Martinez: So then we have all these times. So if it's in red, it means she needs to be there. So if she has a call at 8 in the morning. Because it's usually out of her, not during her normal hours, which is 9 to 3, if I need to let her know, because her brain is already so programmed to run by this

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01:10:32.927 --> 01:10:40.989

Liza Martinez: schedule that if I don't let her know she's probably not gonna look at it, because she usually does not have calls at 9 o'clock in the morning or 8 o'clock in the morning.

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01:10:42.164 --> 01:11:04.929

Liza Martinez: So each of these things it also helps minimize the time she spends looking at things. So if she was to look at her calendar really quick, if she sees something in blue and somebody's trying to schedule a call with her. She's gonna say, oh, that means I'm not committed to being there because red means that she's committed to being there to talk to that person. And Blue means. It's just another thing that she needs to take care of.

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01:11:05.369 --> 01:11:22.839

Liza Martinez: So this has been detrimental in helping me schedule her day without me having to spend time to go back to her and say, Hey, this person wants to meet with you. When can they meet with you, because I already know, based on this schedule or this roadmap.

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01:11:24.730 --> 01:11:38.490

Natalie Bergsma: Yeah. And so when we talk about creating systems and processes, and how that creates scale and leverage for you, it's because it's we're shaving time off of everything that you do



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01:11:38.740 --> 01:11:58.189

Natalie Bergsma: right. So we're not thinking about scheduling as the leader anymore. Right? When Jenny was doing this for me right, we have a template model schedule. It's like, these are times for client calls. These are times for prospecting calls. This is when I'm doing my client work right for you guys, it would be right. This is when I'm doing call backs right? I just work with an advisor.

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01:11:58.530 --> 01:12:02.460

Natalie Bergsma: We didn't have time to call clients just to check in on his schedule.

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01:12:02.460 --> 01:12:03.140

Sara Stanich: Happy place.

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01:12:03.140 --> 01:12:04.480

Natalie Bergsma: Didn't exist

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01:12:04.560 --> 01:12:20.860

Natalie Bergsma: there, right? So if you haven't gone back and done like, here's my model schedule right? And you've got someone in a support role. It also lets the rest of your team know? Like, Hey, when is this person again going back to accessible versus available? You're not just creating boundaries

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01:12:20.930 --> 01:12:33.150

Natalie Bergsma: for clients. But you're setting time with the team. So if it's hey, I'm open from the, you know. 9 Am. To 9, 30 for open office hours for the team. So if you're working on something and you need

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01:12:33.170 --> 01:12:37.640

Natalie Bergsma: a process, it allows you to really kind of check in with those things

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01:12:37.910 --> 01:12:52.480

Natalie Bergsma: and be accountable to your time and kind of hold discipline to that process, because then you're letting someone else come in and set boundaries right. You will, if you ask Jenny anytime. They did this. If someone asked me if they could have a call, I'd be like, well.

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01:12:52.510 --> 01:12:58.660

Natalie Bergsma: I guess we can fit it in on Tuesday at 3 pm. Right before my kids. Thing

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01:12:59.770 --> 01:13:00.660

Natalie Bergsma: right.

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01:13:00.830 --> 01:13:11.089

Natalie Bergsma: But if I set the boundaries, or Lisa setting the boundaries right, she has that ability to say no saying no is one of the hardest things for most of us from a mindset



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01:13:11.340 --> 01:13:22.880

Natalie Bergsma: perspective. Right? It it feels like we're restricting ourselves. And so by putting that kind of gatekeeper in place. It's giving ourselves that time and space

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01:13:23.020 --> 01:13:29.689

Natalie Bergsma: back and so like. This is the example of the model schedule in practice, because

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01:13:30.240 --> 01:13:50.879

Natalie Bergsma: how does someone else know how to set your time if they don't have a model to set it so this allows Lisa to prioritize. What's coming in for Staff, and when there's more than can be done in a day, then she's sitting down in that daily huddle and saying, Hey, you have 87 things on your to do list you only have time, for

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01:13:52.340 --> 01:14:06.569

Natalie Bergsma: here are the things that you've told me are priority. How can I help you with that. So right, there's a checklist for Lisa that says, Okay, number one, we need to have a job description. So Ryan, as you think about that new hire.

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01:14:06.700 --> 01:14:18.250

Natalie Bergsma: What's going on? The job? Description? Right? What are all the things that we really need that person to do? And are we bringing in some of that Ea role, particularly if you're gonna hire a full time person.

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01:14:18.320 --> 01:14:22.310

Natalie Bergsma: Right? You might as well create a person who's gonna get the leverage

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01:14:22.570 --> 01:14:33.379

Natalie Bergsma: for you if you can, or consider how else to get that leverage. Sorry, making sure. We have a job description. When you think about that, Ea rule, it's okay.

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01:14:33.390 --> 01:14:43.900

Natalie Bergsma: Now, what is their responsibilities on a daily, weekly, and monthly basis? And I think this is one of the rubber meets the road is there's a distinction between

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01:14:44.060 --> 01:14:54.080

Natalie Bergsma: what's on your job description and what I need you to do consistently in your role. So for that Ea role we have both of those. So, Sarah, as you think about. Hey? How can I use this person?

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01:14:54.090 --> 01:15:10.510

Natalie Bergsma: What is it that I could have them do? Daily, weekly, monthly? That's gonna pull stuff off of my plate, and that kind of gives them that roadmap, and then, having a consistent model for meeting with them and going over those priorities and getting access

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01:15:10.560 --> 01:15:23.449



Natalie Bergsma: to you? Right? What? How are they? Shadow training? What questions are they being able to ask? Because what? What? Essentially you're doing? Kind of going from level one support to full on chief of staff support is

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01:15:23.500 --> 01:15:25.979

Natalie Bergsma: you're teaching that person to think the way you think

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01:15:27.180 --> 01:15:29.040

Natalie Bergsma: right, being your

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01:15:29.090 --> 01:15:44.449

Natalie Bergsma: proxy right? And so, having all these things in place, and the good news is, we have samples. So that's a great starting point for how to get from point A to point B really, really quickly, and then customizing them to your firm.

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01:15:45.550 --> 01:16:09.850

Natalie Bergsma: So we've talked a little bit about in the the trenches so far. But how many of you really have someone that you're leveraging and meeting with regularly to pull administrative stuff off your plate? Are you doing it via email? Are you meeting with that person. Let's talk about like, how do you actually get stuff off of your plate? How do you delegate

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01:16:20.350 --> 01:16:21.180

Natalie Bergsma: crickets.

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01:16:23.710 --> 01:16:25.390

Natalie Bergsma: Sarah? How are you delegating.

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01:16:29.168 --> 01:16:30.960

Sara Stanich: Well, I do have a weekly

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01:16:31.350 --> 01:16:32.590

Sara Stanich: team meeting.

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01:16:33.563 --> 01:16:35.110

Sara Stanich: We have.

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01:16:35.260 --> 01:16:44.423

Sara Stanich: We use a lot of like pretty detailed workflows for client work, and we use Hubble and integrates with wealth box. So

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01:16:45.784 --> 01:16:51.470

Sara Stanich: Like a lot of that stuff is automated. But sometimes tasks come up for me that I

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01:16:51.580 --> 01:16:54.313
Sara Stanich: then assigned to somebody else.

659

01:16:57.640 --> 01:17:03.329
Sara Stanich: yeah. But as far as like, email, go like, I'm definitely doing my own, my own email, my own schedule

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01:17:07.350 --> 01:17:13.070
Sara Stanich: But you know, I just definitely got some ideas, you know, from this conversation I was just jotting down some things that

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01:17:13.525 --> 01:17:14.785
Sara Stanich: that could could be

662

01:17:15.555 --> 01:17:23.739
Sara Stanich: sent to somebody else as far as client work, though there's there's there's always 2 people assigned to anyone, any client household.

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01:17:23.940 --> 01:17:26.960
Sara Stanich: And so it's always like kind of obvious

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01:17:27.130 --> 01:17:28.040
Sara Stanich: who

665

01:17:28.200 --> 01:17:30.680
Sara Stanich: you know, who who needs to

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01:17:30.890 --> 01:17:32.150
Sara Stanich: take over

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01:17:32.250 --> 01:17:35.599
Sara Stanich: and so like on on most client work.

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01:17:35.870 --> 01:17:36.650
Sara Stanich: I'm

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01:17:36.870 --> 01:17:39.990
Sara Stanich: cced, but I'm you know, not doing it.

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01:17:40.670 --> 01:17:41.623
Natalie Bergsma: Yeah.

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01:17:42.260 --> 01:17:48.050

Natalie Bergsma: I think it's interesting, because I often find that for advisors like when they get the right

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01:17:48.900 --> 01:18:16.920

Natalie Bergsma: csa or service advisor, in place. Leveraging client work becomes pretty easy for them. But we still hold on to these other things. We still hold on to our email, to scheduling the prioritization of our work. We hold on to Hr. Finance billing right? All of these things that really are below the line activity for most advisors. So I think I would encourage you, sir, to really kind of

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01:18:17.110 --> 01:18:19.419

Natalie Bergsma: talk about and go through that list like.

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01:18:19.700 --> 01:18:41.550

Natalie Bergsma: okay, I know how it works like if it works for your client work this way, and it can be really effective when we put systems and processes in place around client work and client workflows, and we see the leverage there. What would my life be like if I could gain it on the personal assistant side? Right? What my life be like if I could get rid of all of these lower level

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01:18:41.620 --> 01:18:46.249

Natalie Bergsma: activities that are really eating up my time email, scheduling.

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01:18:46.520 --> 01:19:11.370

Natalie Bergsma: building a Powerpoint presentation for a speaking event like any of those kinds of things that come up. And then what's what's interesting is that we don't usually have a model for how this works. We don't have a structure right? We build workflows for client work, but when it comes to sort of the working on the business work there's no model and structure in place. And then we wonder why the person that we brought into that position can't be successful.

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01:19:11.840 --> 01:19:27.279

Natalie Bergsma: because there's no structure to support their growth and development. So that's part of all of these pieces as we look to bring in these roles is, how do we create a structure that creates a system of success. How can I delegate

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01:19:27.280 --> 01:19:43.279

Natalie Bergsma: sort of that work product and all the details? So that over time that person really can learn my work, style, and how I function and help me move the ball forward in all of the areas of the business. That's what's really unique about this position, is it covers

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01:19:43.320 --> 01:19:47.519

Natalie Bergsma: kind of everything. It is your right hand, so to speak.

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01:19:50.352 --> 01:19:52.320

Natalie Bergsma: And that's really where

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01:19:52.470 --> 01:20:05.599



Natalie Bergsma: you know it's those little amounts of time. 2 min here, 3 min there 5 min right? If we start adding that up. I think Lisa's point about Stephanie being militant about this is, we're always looking for ways to shave time

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01:20:06.310 --> 01:20:10.359

Natalie Bergsma: right? How can we get things off of her plate

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01:20:10.440 --> 01:20:30.809

Natalie Bergsma: and onto someone else's so that she can focus on the things that are really in her unique ability and wheelhouse, but also because when we do that, it enables other people to grow. So if we keep holding on to everything, we're really limiting other people's growth and development because we're not giving them the opportunity

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01:20:30.850 --> 01:20:33.060

Natalie Bergsma: to to grow as well.

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01:20:36.810 --> 01:21:05.809

Natalie Bergsma: so number one role for success. And this is, I think a good point is that you need someone who fits your style, but also has the skills to do the job at its fullest. So I think, a really good example. I can give. You all know that I had Jenny on my team. She was my Ea, my operations person. She was very good at that role. But what I needed was someone who had skills to triage and project, manage client work as well.

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01:21:05.850 --> 01:21:14.710

Natalie Bergsma: And so as much as I loved working with her, and she was very good at a function of that job, right? She wasn't able to do the role.

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01:21:14.870 --> 01:21:35.179

Natalie Bergsma: and it's fullest and highest, best use. So I had to make a shift because it wasn't the right position to leverage me in the best way possible. So number one is, you need to have someone who fits the whole of what you're trying to accomplish, which is getting down to that job description. And number 2 is

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01:21:35.330 --> 01:21:48.909

Natalie Bergsma: they have to have the skills to do the job in its entirety. So it's more than just scheduling. It's prioritizing and right stuff will always say right in this position. Your number one job is to think

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01:21:48.910 --> 01:22:09.499

Natalie Bergsma: right. A really great example is this, the best Eas become leaders in organizations? They don't stay administrative assistance. Michael's Ea is now his managing director@kidsthis.com. She's running the business on a day-to-day basis, because in that role as Ea, she learned about every

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01:22:09.690 --> 01:22:17.309

Natalie Bergsma: aspect of the business, from Hr. To finance to building content. That's what Lisa's doing today. Right? She's



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01:22:17.400 --> 01:22:22.849

Natalie Bergsma: in content. She's in client work. She's in scheduling. She's really in

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01:22:22.980 --> 01:22:30.740

Natalie Bergsma: every piece of the business, and as she grows she's going to step into that over time and become kind of that full right

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01:22:30.880 --> 01:22:31.670

Natalie Bergsma: hand.

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01:22:35.380 --> 01:22:58.120

Natalie Bergsma: Alright. Let's open it up for QA. And then we're gonna do some breakouts. Are there any open, ended questions that we haven't answered about structure process. I know we've kind of dived in and out of, like the different components of the entourage from the client side to the business side to the personal assistant, Ea. Side, so open to

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01:22:58.390 --> 01:23:07.579

Natalie Bergsma: anything in there that you guys want to talk about. And if there are any more questions about structure or process for how Lisa, supporting Stephanie like this is the

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01:23:07.990 --> 01:23:10.449

Natalie Bergsma: open time we'll we'll drop into breakouts.

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01:23:14.650 --> 01:23:18.308

Chris Wedell: There's only 3 of us, I mean, I feel like we are a breakout.

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01:23:19.703 --> 01:23:24.796

Natalie Bergsma: That that probably is the case. So we will drop into this this breakout.

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01:23:25.487 --> 01:23:30.299

Chris Wedell: Which, by the way, it's a group of females like this doesn't happen a lot in our industry.

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01:23:31.500 --> 01:23:32.570

Chris Wedell: I know that's exciting.

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01:23:33.640 --> 01:23:38.360

Natalie Bergsma: I mean I get to have the tough conversation is that we are the worst at letting go.

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01:23:42.350 --> 01:23:44.369

Liana Poodiack: I would definitely agree with that.

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01:23:44.530 --> 01:23:46.329

Chris Wedell: Because we're the best at getting me.

704

01:23:46.330 --> 01:23:47.460

Liana Poodiack: That's hard

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01:23:47.510 --> 01:23:50.889

Liana Poodiack: is. I started in the industry as

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01:23:51.050 --> 01:23:52.590

Liana Poodiack: as an assistant

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01:23:52.930 --> 01:23:55.540

Liana Poodiack: for a year before.

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01:23:55.860 --> 01:24:02.470

Liana Poodiack: you know, just for whatever reason I had to do that before I broke out on my own. So I've always been this like kind of control freak of.

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01:24:03.070 --> 01:24:05.520

Liana Poodiack: you know, wanting to make sure that

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01:24:05.580 --> 01:24:08.429

Liana Poodiack: my eyes are dotted. My t's are crossed.

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01:24:08.520 --> 01:24:10.389

Liana Poodiack: Not that I don't, you know.

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01:24:10.820 --> 01:24:13.820

Liana Poodiack: Mess things up periodically, but I think

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01:24:14.819 --> 01:24:20.809

Liana Poodiack: the goal of my staff during our next transition is that I'm not gonna know

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01:24:21.680 --> 01:24:30.700

Liana Poodiack: that's their goal, how to do a lot of the stuff. So I'm going to have to rely on them to get stuff done. So that's their goal. So I can be focusing on

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01:24:30.990 --> 01:24:34.699

Liana Poodiack: new clients and and all of that. So.

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01:24:35.900 --> 01:24:37.450



Liana Poodiack: but it is hard to let go.

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01:24:41.730 --> 01:24:44.820

Natalie Bergsma: What's the story there, Leanna, about

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01:24:45.220 --> 01:24:49.529

Natalie Bergsma: letting go, particularly as you've you've done all the jobs.

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01:24:51.950 --> 01:24:53.459

Liana Poodiack: Sorry? What was the question?

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01:24:53.460 --> 01:24:56.660

Natalie Bergsma: What's the story there when you say it's hard for me to let go?

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01:24:57.500 --> 01:24:59.200

Natalie Bergsma: What has you holding on.

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01:24:59.940 --> 01:25:01.477

Liana Poodiack: Well, I guess.

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01:25:02.530 --> 01:25:05.579

Liana Poodiack: Yeah, I guess that's some of it, is that

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01:25:06.375 --> 01:25:06.870

Liana Poodiack: I

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01:25:07.570 --> 01:25:10.830

Liana Poodiack: you know I feel that.

726

01:25:11.840 --> 01:25:15.720

Liana Poodiack: you know as I've tried to train, and it's more Alexis, my

727

01:25:17.890 --> 01:25:21.770

Liana Poodiack: I mean when I'm asking her to get something done. It's like

728

01:25:21.780 --> 01:25:23.899

Liana Poodiack: she will only do

729

01:25:24.250 --> 01:25:27.539

Liana Poodiack: ask the basic question like she doesn't have this

730



01:25:28.360 --> 01:25:32.160

Liana Poodiack: mind that just wants to know that additional like

731

01:25:32.400 --> 01:25:39.479

Liana Poodiack: one question generally leads the answer will lead to some additional questions. And so it's not just a straight.

732

01:25:39.730 --> 01:25:43.140

Liana Poodiack: Oh, go figure this out because

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01:25:44.190 --> 01:25:47.900

Liana Poodiack: she just doesn't have the. I don't know the thought process to

734

01:25:47.970 --> 01:25:53.810

Liana Poodiack: investigate it further. So then she'll come back to me with an answer, and I'll be like, well.

735

01:25:54.130 --> 01:25:56.040

Liana Poodiack: what about in this?

736

01:25:56.260 --> 01:26:03.230

Liana Poodiack: You know this next part of it? And she's like, Oh, I I didn't think about that part, so she'll have to go back, and

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01:26:03.780 --> 01:26:04.970

Liana Poodiack: I don't know the

738

01:26:05.240 --> 01:26:06.949

Liana Poodiack: we're not sure if it's right.

739

01:26:07.010 --> 01:26:11.450

Liana Poodiack: right person, wrong job kind of thing. So that's what we have always struggled with.

740

01:26:11.530 --> 01:26:18.139

Liana Poodiack: I'm the nice guy. I have a hard time kind of setting the rules and saying, Hey, you're not getting your job done.

741

01:26:18.280 --> 01:26:19.960

Liana Poodiack: What's going on?

742

01:26:20.920 --> 01:26:22.580

Liana Poodiack: So we're, gonna

743



01:26:23.060 --> 01:26:25.746

Liana Poodiack: you know, put a lot more things.

744

01:26:27.240 --> 01:26:30.946

Liana Poodiack: kind of on the plate that we're monitoring

745

01:26:31.810 --> 01:26:34.960

Liana Poodiack: to make sure that we have the right person

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01:26:35.270 --> 01:26:37.730

Liana Poodiack: in the right seat for her.

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01:26:39.210 --> 01:26:40.080

Liana Poodiack: And that's

748

01:26:40.680 --> 01:26:42.919

Liana Poodiack: that's our challenge. So that's part of it.

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01:26:45.300 --> 01:26:48.189

Liana Poodiack: and part of it is just, you know, even when

750

01:26:48.450 --> 01:26:49.540

Liana Poodiack: I

751

01:26:49.560 --> 01:26:51.959

Liana Poodiack: get information, I always kind of

752

01:26:52.890 --> 01:26:56.690

Liana Poodiack: second. Guess it, and a lot of times, you know I will.

753

01:26:57.300 --> 01:27:00.383

Liana Poodiack: you know, if we have a problem with an account getting a

754

01:27:01.800 --> 01:27:09.900

Liana Poodiack: a state or something settled. We had an Ir settlement that was going on, and she's like, Oh, you know, back Office said, we can't do that, and I'm like.

755

01:27:10.080 --> 01:27:11.200

Liana Poodiack: Wow.

756

01:27:11.300 --> 01:27:16.440

Liana Poodiack: I'm pretty sure they can. So it took me to.



757

01:27:16.510 --> 01:27:22.060

Liana Poodiack: you know. Push, push, push, get it escalated up to a manager position

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01:27:22.230 --> 01:27:29.650

Liana Poodiack: to yes, find out that. Yes, it could be done, and she's not going to do that kind of stuff. She's not going to take the initiative

759

01:27:30.646 --> 01:27:32.790

Liana Poodiack: to push things through.

760

01:27:33.940 --> 01:27:37.799

Liana Poodiack: and so if I just took her word for it that yes, they said no.

761

01:27:38.080 --> 01:27:44.349

Liana Poodiack: Then a lot of you know, and that doesn't happen that often. But it happens, you know, a couple of times a year where

762

01:27:44.470 --> 01:27:47.669

Liana Poodiack: you know you get a wrong answer, and she's not. Gonna

763

01:27:48.470 --> 01:27:51.287

Liana Poodiack: and she's been with us for 8 years.

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01:27:52.800 --> 01:27:55.060

Liana Poodiack: it just seems like sometimes she doesn't

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01:27:55.300 --> 01:27:56.930

Liana Poodiack: retain some of that.

766

01:27:59.320 --> 01:27:59.880

Natalie Bergsma: Morning.

767

01:28:00.600 --> 01:28:01.120

Natalie Bergsma: What do you guys.

768

01:28:01.120 --> 01:28:04.110

Liana Poodiack: She's wonderful with the clients, you know, so she's.

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01:28:06.370 --> 01:28:08.710

Liza Martinez: So I'll chime in here.



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01:28:09.160 --> 01:28:28.139

Liza Martinez: I'm still new. I'm still new working with Stephanie. We started working together back in February. I've always considered myself a very proactive person like I'm always. I'm always taking initiative, always trying to figure it out before I go bug her and that's how I've always worked. But after I started working with her she has

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01:28:28.250 --> 01:28:37.089

Liza Martinez: standards. She has a process in place, and what I love about it is like she knows exactly what she wants.

772

01:28:37.140 --> 01:28:53.629

Liza Martinez: and because she knows exactly what she wants. She's like. There's been times where you know. Unfortunately, I've forgotten certain steps, and she'll outright. Ask me to say, Okay, I want you to take me to your thinking process, and I feel like that's helped me grow.

773

01:28:53.640 --> 01:29:20.439

Liza Martinez: so I don't know if you feel comfortable having that conversation with her. It doesn't put any blame on the person, but it puts gives you a little bit more perspective into how they're thinking about things, and I find it. That's very. It's constructive for me, cause then I can talk to her through like why I did it this way, or you know, what was I thinking? And then she could say, Okay, well, I think that if you would have done Xyz you would have

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01:29:20.440 --> 01:29:27.120

Liza Martinez: better results or a bit more efficient. So I feel like that's a good way to grow without

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01:29:27.440 --> 01:29:30.420

Liza Martinez: coming off like you're not doing your job correctly.

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01:29:34.210 --> 01:29:43.825

Chris Wedell: And Leanna. I know we talked about this in Jackson Hole a bit, and she's, you know, probably not the right fit, but I don't know if I mentioned this or not like with my

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01:29:44.437 --> 01:29:48.180

Chris Wedell: one of my team members. She's been with me over 10 years now.

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01:29:48.510 --> 01:29:56.859

Chris Wedell: probably like 2 years into it, you know. She's just. She was just really good at doing exactly what I told her to do.

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01:29:57.561 --> 01:30:02.018

Chris Wedell: And no more, no less. We're like a very fantastic order taker.

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01:30:02.510 --> 01:30:04.020

Chris Wedell: And it was kind of like.



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01:30:04.170 --> 01:30:16.610

Chris Wedell: okay, like, I know, like, I know, you're smarter than this and what it looked for her. She actually just needed permission. Right? Like I was like, listen, you're very good. You will do anything I tell you to do without question

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01:30:16.780 --> 01:30:20.270

Chris Wedell: you. You will do it, and I don't worry that it's gonna get done

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01:30:21.540 --> 01:30:40.790

Chris Wedell: But you're allowed to think like you know what I mean, like you're allowed to come up with solutions to do more than just like what I am asking of you. You're allowed to think through the next steps, or like question the answer you got like I had to give her explicit permission to be more than an order taker.

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01:30:41.110 --> 01:30:41.470

Liana Poodiack: Hmm.

785

01:30:41.470 --> 01:30:43.470

Chris Wedell: And like it was night and day.

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01:30:43.630 --> 01:30:48.802

Chris Wedell: and like, I think it's 12 years later, she's with like with me.

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01:30:49.830 --> 01:30:53.080

Natalie Bergsma: Yeah, I think part of part of what you're pointing to Chris, is that

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01:30:53.580 --> 01:31:12.770

Natalie Bergsma: particularly, I think, in the Admin kind of Csa or Ea role like we're, we're so used to that role being a support, position and order taker that they don't know how to step up. And we don't know how to give them that permission, right? Because that even that profile has a tendency to sit in that

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01:31:13.000 --> 01:31:19.500

Natalie Bergsma: space. So one of the things that I can tell you is, once you start giving that permission to that person.

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01:31:20.610 --> 01:31:23.859

Natalie Bergsma: then you can see if they step up or don't.

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01:31:24.360 --> 01:31:31.809

Natalie Bergsma: because if she hadn't stepped up if you've explicitly said like, Hey, you have a hundred like full blow.

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01:31:32.020 --> 01:31:43.399

Natalie Bergsma: Make mistakes. That's okay, like, here's the expectations that I want. So, Leanne, you might say, Hey, I know that this I want you to do this thing. It's very hard to do. You might get pushed back

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01:31:43.990 --> 01:31:45.680

Natalie Bergsma: if you get pushback

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01:31:45.860 --> 01:31:47.810

Natalie Bergsma: like you need to practice

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01:31:47.820 --> 01:31:53.939

Natalie Bergsma: pushing back. Escalating right? Doesn't sound like she's learned how to escalate issues at a custodian.

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01:31:54.050 --> 01:31:59.210

Natalie Bergsma: Right? So some of it's just technical knowledge. But some of it is, I think these are soft skills.

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01:31:59.420 --> 01:32:24.059

Natalie Bergsma: And so sometimes we're really good at training. Technical skill sets. How do you process paperwork? How do you enter data into the planning system? We're not always great leaders at training soft skills. How do you think strategically, how do you solve problems? How do you address conflict? Because it's a conversation about? We feel it's a conversation about who they are as a person

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01:32:27.140 --> 01:32:32.709

Natalie Bergsma: you're not good at X. That's gonna make you feel bad. So I'm just not gonna have that conversation with you.

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01:32:34.100 --> 01:32:43.930

Natalie Bergsma: And so I think that's a really critical piece of this puzzle, which is, you have to get really comfortable, having uncomfortable conversations about people's growth.

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01:32:45.820 --> 01:32:46.950

Liana Poodiack: No, that's true.

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01:32:51.020 --> 01:32:54.179

Natalie Bergsma: What else comes up for you guys or anything else? There

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01:32:56.400 --> 01:32:57.230

Natalie Bergsma: are you ladies.

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01:32:57.450 --> 01:33:04.020

Sara Stanich: I have a couple. Well, one that that phrase take me through your thought process. On this I



I wrote that down, cause I feel like I

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01:33:04.400 --> 01:33:12.139

Sara Stanich: that's that's useful. But also I've shared about a person on my team who's a little like under utilized and

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01:33:12.734 --> 01:33:17.565

Sara Stanich: has been doing trading, and that's taken a load off of me. But I was making this list of,

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01:33:17.910 --> 01:33:21.940

Sara Stanich: you know, some operational tasks that you know, potentially for an Ea, but

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01:33:22.870 --> 01:33:29.680

Sara Stanich: actually like this other person could do some of these things. So anyways, it's it is. It is removing some things

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01:33:30.560 --> 01:33:31.959

Sara Stanich: from my plate.

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01:33:34.320 --> 01:33:40.860

Sara Stanich: things like proposals and billing and agreements. And you know, there's there's a lot of stuff that

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01:33:41.674 --> 01:33:43.869

Sara Stanich: that I am doing. That would be better.

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01:33:43.880 --> 01:33:46.210

Sara Stanich: My time would be better spent on.

812

01:33:46.940 --> 01:33:49.060

Sara Stanich: you know, having coffee with a

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01:33:49.380 --> 01:33:51.990

Sara Stanich: local attorney, or whatever.

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01:33:53.300 --> 01:33:53.949

Liza Martinez: You know, but.

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01:33:53.950 --> 01:33:55.810

Sara Stanich: That person couldn't do. Yes.

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01:33:56.450 --> 01:33:58.002



Liza Martinez: Stephanie has actually

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01:33:58.780 --> 01:34:06.880

Liza Martinez: yeah, like, we figured out a couple of emails that she usually sends like for prospect and things like that. And what we've started doing is building templates.

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01:34:06.880 --> 01:34:31.859

Liza Martinez: So we had email, one that would go out to like a prospect email 2. And we've already established. You'll send that next week, and then we have the next one like the final one. Then we'll send that X number of days out, and so now I can even take that. I've taken that off her plate. And I can now email clients, because I have this template. That I can use. And that's would be a suggestion for you.

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01:34:31.860 --> 01:34:38.069

Liza Martinez: Like, if you start having them do that, just give them some template emails emails that you're happy with, and then just

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01:34:38.070 --> 01:34:58.879

Liza Martinez: have that taken care of. And then, I update Stephanie through Asana. And I say, Hey, we have this new prospect the email does to say that this is their information. This is an inquiry. And I sent them the email on this day. And I already schedule out like the next 2 emails. So if I don't hear back, then I send the second email and so forth.

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01:35:00.430 --> 01:35:01.070

Liza Martinez: Yeah.

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01:35:01.070 --> 01:35:14.659

Natalie Bergsma: I mean, it's really finding like, where that stuff fits on your team, Sarah. So whether it's an Ea or it's service work for an associate like just it starts by putting the list together.

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01:35:14.720 --> 01:35:17.630

Natalie Bergsma: And so I think that's the piece, which is.

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01:35:17.740 --> 01:35:26.660

Natalie Bergsma: that's our 1st point of resistance, is just sitting down and making a list of all the things that we do

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01:35:26.840 --> 01:35:31.719

Natalie Bergsma: and where we want to spend our time, and where we don't want to spend our time.

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01:35:32.230 --> 01:35:45.239

Natalie Bergsma: So like you said, Hey, I I know at least 3 things right billing proposals. Right? So what's your next action? There? Where do you wanna like, okay, even if, like, those are 3 things.

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01:35:45.980 --> 01:35:49.160



Natalie Bergsma: how can you move that needle forward instead of just sitting on.

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01:36:00.640 --> 01:36:10.872

Sara Stanich: Well, I know I'm talking to the one person right after this call, so I'll ask her if she's got time. But the other person. Actually I I should just I I'll I'll send her a message and ask her if she's still.

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01:36:11.900 --> 01:36:13.900

Sara Stanich: you know, looking for

830

01:36:14.560 --> 01:36:15.970

Sara Stanich: for some work this summer.

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01:36:16.720 --> 01:36:17.300

Natalie Bergsma: Okay.

832

01:36:18.800 --> 01:36:21.149

Natalie Bergsma: what about you, Chris? What come, what comes up.

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01:36:23.870 --> 01:36:39.590

Chris Wedell: So I've done that above the line below the line which has been helpful, because from that we came up with the service inbox and a centralized like phone and email address, which was huge because I spent way too much like everybody goes through me like they just

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01:36:39.940 --> 01:36:43.625

Chris Wedell: they e they need me. They call me, they email me

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01:36:44.040 --> 01:36:51.868

Chris Wedell: So that's been huge. Now we're still there's still a lot of clients that need to kinda like, take hold of it like I'm still getting

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01:36:52.240 --> 01:36:55.111

Chris Wedell: more than I'd like, but it's been better.

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01:36:55.881 --> 01:37:13.890

Chris Wedell: I don't do any of my scheduling. Luckily with you know, at Rfg. You know, part of the platform fee that I pay for covers like I don't do billing. I don't do like I don't really pay for my events like I just get a lot of support, you know, because we pay for it for that. But I there are still more

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01:37:14.740 --> 01:37:21.637

Chris Wedell: handing off that I need to do from a like a client meeting preparation standpoint like I know that.

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01:37:22.430 --> 01:37:31.039



Chris Wedell: there's and you know, not to make excuses. But we're in the process of change, like our salesforce, just got up like, not upgraded, but.

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01:37:31.040 --> 01:37:32.740

Natalie Bergsma: Yeah, they switched it out.

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01:37:32.890 --> 01:37:38.351

Chris Wedell: Yeah, they switched it to like the cloud base. So like it feels a little bit like we're relearning some of that.

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01:37:39.970 --> 01:37:50.909

Chris Wedell: we just we're, you know, we now have nitrogen along with hidden levers. So we're trying to figure out which risk management to use. And then we're actually transitioning from money guide pro to em money. So like.

843

01:37:51.120 --> 01:37:52.960

Chris Wedell: there's a lot of

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01:37:53.610 --> 01:38:02.389

Chris Wedell: technology changes happening right now. So it's hard to just tell somebody on the team. Alright. Here's the process, and what to do, because I'm still

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01:38:02.720 --> 01:38:15.879

Chris Wedell: figuring it out myself. Oh, and Orion took away some tools starting today that I've been using for 7 years. So I'm like, holy shit, like literally the processes I've been doing

846

01:38:16.350 --> 01:38:22.773

Chris Wedell: like every single one just got changed on me like in the last like right now, like you know what I mean like right now

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01:38:24.190 --> 01:38:32.860

Chris Wedell: and so like, I do know that that's kind of my next like what I'm in the middle of working on is alright. What are the processes so that way?

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01:38:33.300 --> 01:38:39.420

Chris Wedell: Not only do I need to know them myself, but then I can train them and and get that off my plate. So I'm not doing as much.

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01:38:40.900 --> 01:38:54.770

Natalie Bergsma: Got it. So you're really focused on. And like, business happens, systems change, things change. So that's really where you're spending your time and energy. So you're in the build. It phase so that I can create

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01:38:54.800 --> 01:38:57.690



Natalie Bergsma: the leverage. What, I would ask you is.

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01:38:59.350 --> 01:39:04.269

Natalie Bergsma: where can my team support me in that in any way, shape

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01:39:04.540 --> 01:39:05.710

Natalie Bergsma: or form.

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01:39:05.710 --> 01:39:25.450

Chris Wedell: We are doing team trainings. We have our weekly huddles like Sarah has, where we're just talking about the business every week, so we're constantly communicating. But I've been scheduling like just our team trainings with each of these vendors specifically. So that way I can get their feedback on the process to like. I want them hands in hands on with it.

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01:39:25.680 --> 01:39:26.550

Chris Wedell: Yes.

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01:39:26.550 --> 01:39:44.495

Natalie Bergsma: And I think that you said something. There, that's really critical. It's come up a couple of times. And, Lisa, you said it really well, which is understanding like your thought process. So I love systems and processes. I will tell you to use systems and processes all day long, when all is fails, the system will save you.

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01:39:44.870 --> 01:39:50.380

Natalie Bergsma: But part of what you want to train your team. To be able to do is think.

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01:39:51.350 --> 01:39:52.010

Liana Poodiack: Hmm.

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01:39:53.290 --> 01:40:02.349

Natalie Bergsma: And so that's a part of this systemization that you need to have is, how do I give my team, the tools and the training

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01:40:02.440 --> 01:40:04.480

Natalie Bergsma: to be able to

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01:40:04.530 --> 01:40:09.680

Natalie Bergsma: function outside of this. So Lisa, really great example of this is.

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01:40:09.900 --> 01:40:15.669

Natalie Bergsma: someone needs to get in Stephanie's calendar outside of her schedule. Stephanie's not available.

862



01:40:17.520 --> 01:40:25.199

Natalie Bergsma: Lisa then, has to figure out, okay, I have the guidelines, but at the end of the day I can't know every nuanced.

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01:40:25.360 --> 01:40:34.569

Natalie Bergsma: perfect way of being I have to know like, Hey, is the meeting with Natalie important enough to break to break the boundaries.

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01:40:37.190 --> 01:40:54.240

Natalie Bergsma: And so I think that's a key component of when we're looking at team members and growing development is assessing, what's their critical thinking skill set? Can they jump to that next level? And then where can we give them responsibilities to do that? How can we start to let

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01:40:54.270 --> 01:40:59.560

Natalie Bergsma: those things go, and I think that's where a lot of us meet. Resistance is

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01:41:00.330 --> 01:41:02.499

Natalie Bergsma: letting go of thinking

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01:41:03.220 --> 01:41:04.250

Natalie Bergsma: is hard

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01:41:07.050 --> 01:41:09.979

Natalie Bergsma: because it means letting go of some decision making as well.

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01:41:19.070 --> 01:41:30.719

Natalie Bergsma: So what's your next step, Chris, if you're in the need of it, and you've got to create some time and space, what are your clear like, okay, here's what I gotta do to get to the place. I need to be.

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01:41:30.930 --> 01:41:33.360

Chris Wedell: Oh, just defining processes.

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01:41:33.580 --> 01:41:34.629

Chris Wedell: Okay, what's.

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01:41:34.630 --> 01:41:38.400

Natalie Bergsma: What's your? What process is gonna create the most leverage for you?

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01:41:39.736 --> 01:41:42.829

Chris Wedell: The 1st one is the client review process.

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01:41:42.970 --> 01:41:47.110



Chris Wedell: and then the second one is the onboarding new client process.

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01:41:50.800 --> 01:41:55.769

Chris Wedell: and then the next one is prospecting event. Follow up process.

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01:41:56.490 --> 01:42:10.649

Natalie Bergsma: Yeah, which is great cause. Actually, that's the order I recommend doing them in. Almost everyone wants to start at the beginning and work to the end. But 90% of your work is in the client review process. So that's really where I recommend starting. If you don't have

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01:42:10.800 --> 01:42:23.549

Natalie Bergsma: solid processes in place. But think about like, what are the ways the team can help with that. So if we're having a team meeting, we're documenting it. Maybe the team walks away with the 1st draft

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01:42:23.700 --> 01:42:38.789

Natalie Bergsma: of the process based on your meeting, and then you can review it. Or the team walks away with the 1st draft of the email communication that goes with the process right? Really finding anywhere, you can create that leverage.

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01:42:39.196 --> 01:42:44.070

Natalie Bergsma: Is gonna create that time and space. But it's also gonna help train the team to think

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01:42:44.270 --> 01:42:49.440

Natalie Bergsma: independently of you like you said, like, I'm the funnel. So like, how can you

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01:42:49.670 --> 01:42:52.909

Natalie Bergsma: really put yourself in the position of not being

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01:42:52.960 --> 01:42:54.460

Natalie Bergsma: yeah funnel anymore.

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01:42:54.810 --> 01:42:55.430

Chris Wedell: Yeah.

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01:42:57.350 --> 01:42:58.020

Natalie Bergsma: Okay.

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01:42:58.560 --> 01:42:59.410

Chris Wedell: Awesome.

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01:43:00.860 --> 01:43:05.999

Natalie Bergsma: Anything else. You guys feeling good? Any other questions, thoughts, points of



resistance.

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01:43:07.248 --> 01:43:14.731

Chris Wedell: I have a networking thing in 5 min. So I'm gonna hop early. So I can use the bathroom and have the water and be ready on time.

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01:43:14.990 --> 01:43:15.863

Natalie Bergsma: Sounds good.

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01:43:16.300 --> 01:43:17.130

Sara Stanich: Was, good. Yeah.

890

01:43:17.130 --> 01:43:18.897

Chris Wedell: Have a great 4th of July. Everyone.

891

01:43:19.150 --> 01:43:19.500

Natalie Bergsma: I am.

892

01:43:19.500 --> 01:43:20.270

Liana Poodiack: Thank you.

893

01:43:20.680 --> 01:43:21.910

Natalie Bergsma: Thank you.

894

01:43:22.120 --> 01:43:22.750

Sara Stanich: Bye-bye.

