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## UPCOMING EVENTS

- 09.03 GROWTH SUMMIT (VIRTUAL)
- 09.12-13 LEADERS RETREAT (IN-PERSON)



## UPCOMING COACHING CALLS

- 07.08 OFFICE HOURS  
with Coach Adam
- 07.15 PERSONAL-PEAK COACHING CALL  
Open Mindset with Coach Liz
- 07.22 LEADERS COHORT  
with Coach Natalie



USE ZOOM Q&A FOR TODAY'S QUESTIONS



LEADERS

# PEAK-PRACTICE

COACHING CALL



BUILDING YOUR

EA ENTOURAGE



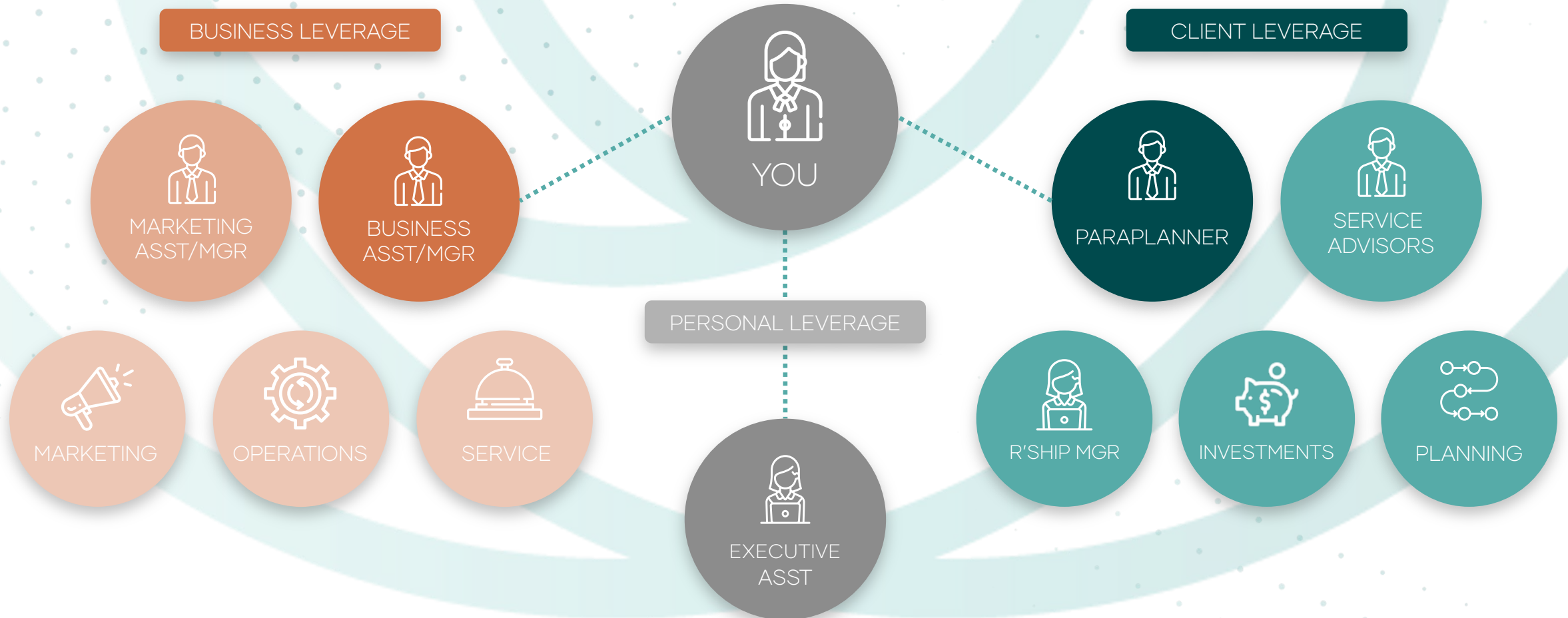
# LIFE BEFORE AN EA OVERWHELMING DISARRAY



LIMITLESS

# THE MODEL

## CREATING LEVERAGE ACROSS PRACTICE AREAS



YOU



ASST



EXTERNAL WORLD



Accessible

I'm here, here's how I can help.



Available

I'm here, I'm at your disposal.

OUTSOURCE



OUTSOURCE

EMPLOYEE



CONTRACTOR



VIRTUAL



EMPLOYEE  
HIRE

NEEDS



FULL-TIME



PART-TIME

NO ONE SIZE FITS ALL

# CAN YOU AFFORD NOT TO?

The image shows three overlapping worksheets. The top-left one is titled "Align Your Time and Energy" and has a section for "ENERGY PRODUCING & REVENUE CREATING" with a green header and a section for "ENERGY DRAINING & REVENUE DEPLETION" with a red header. The middle one is titled "Below the Line Task Transition" and features a table with columns for "TASK NAME", "Days", "Hours", "Minutes", "Seconds", and "TASK NOTES". The bottom one is another "Align Your Time and Energy" worksheet, partially obscured.

Research indicates that advisors spend more than 2 hours on behind-the-scenes activities for every 1 hour spent in client-facing activities

Average hours per week spent on below-the-line work?

Are you *filling* your time or *investing* it to improve your situation?

Weekly Hours on Below-the-Line Activities:  
 $2 \text{ hrs/day} \times 5 \text{ days/week} = 10 \text{ hrs/week}$

Potential New Clients Gained:  
 $10 \text{ hrs/week} / 10 \text{ hrs/client} = 1 \text{ client/week}$   
 $1 \text{ client/week} \times 48 \text{ weeks/year} = 48 \text{ clients/year}$

Annual Potential New Client Revenue:  
 $48 \text{ clients/year} \times \$7,000/\text{client} = \$336,000/\text{year}$

Total Hours/Year on Below-the-Line  
Activities:  
 $10 \text{ hrs/week} \times 48 \text{ weeks/year} = 480 \text{ hrs/year}$

Lifetime Revenue Lost:  
 $\$336,000/\text{year} \times 20 \text{ years} = \$6,720,000$

## ADMINISTRATIVE ASSISTANT

### Compensation Information

#### POSITION DESCRIPTION:

Performs secretarial and clerical duties such as typing correspondence, memoranda, reports, and meeting notes; scheduling appointments and meetings; and operating office equipment such as photocopier, facsimile, etc.

#### TRADITIONAL COMPENSATION INFORMATION

<b>Total Traditional Compensation</b>	3rd Quartile	\$57,491
	Median	\$50,000
	1st Quartile	\$43,731
<b>Base Salary</b>	3rd Quartile	\$53,000
	Median	\$48,000
	1st Quartile	\$40,371
<b>Annual Incentive</b>	3rd Quartile	\$5,061
	Median	\$3,994
	1st Quartile	\$2,000
<b>Commission</b>	3rd Quartile	N/A
	Median	N/A
	1st Quartile	N/A

#### OTHER COMPENSATION AND OWNERSHIP INCOME

<b>Total Income</b>	3rd Quartile	\$57,491
	Median	\$50,000
	1st Quartile	\$43,731
<b>Profit Distribution</b>	3rd Quartile	N/A
	Median	N/A
	1st Quartile	N/A

## EXECUTIVE ASSISTANT

### Compensation Information

#### POSITION DESCRIPTION:

Supports the executives of the firm, including calendars, appointments, correspondence, and travel.

#### TRADITIONAL COMPENSATION INFORMATION

<b>Total Traditional Compensation</b>	3rd Quartile	\$82,500
	Median	\$61,800
	1st Quartile	\$51,550
<b>Base Salary</b>	3rd Quartile	\$82,500
	Median	\$57,000
	1st Quartile	\$50,000
<b>Annual Incentive</b>	3rd Quartile	\$8,000
	Median	\$5,000
	1st Quartile	\$3,500
<b>Commission</b>	3rd Quartile	N/A
	Median	N/A
	1st Quartile	N/A

#### OTHER COMPENSATION AND OWNERSHIP INCOME

<b>Total Income</b>	3rd Quartile	\$82,500
	Median	\$62,700
	1st Quartile	\$52,863
<b>Profit Distribution</b>	3rd Quartile	N/A
	Median	N/A
	1st Quartile	N/A

## ASSISTANT COMPENSATION

### Admin/Executive Assistant

- Freelancers, \$25–\$35/hr
- U.S.-based agencies for VAs (Belay, Boldly, Athena) \$35–\$55/hr

# OFFICE MANAGER COMPENSATION

## Compensation Information

### POSITION DESCRIPTION:

Associate level position responsible for overall general office operations, such as internal accounting, office equipment and supplies, benefits administration, and payroll coordination. May also coordinate firm's Web site or other marketing tools. This is a catch-all function in firms that do not employ multiple staff members responsible for each of these functions.

### TRADITIONAL COMPENSATION INFORMATION

<b>Total Traditional Compensation</b>	3rd Quartile	\$78,946
	Median	\$69,905
	1st Quartile	\$63,000
<b>Base Salary</b>	3rd Quartile	\$75,000
	Median	\$65,000
	1st Quartile	\$58,000
<b>Annual Incentive</b>	3rd Quartile	\$8,247
	Median	\$6,075
	1st Quartile	\$4,700
<b>Commission</b>	3rd Quartile	N/A
	Median	N/A
	1st Quartile	N/A

### OTHER COMPENSATION AND OWNERSHIP INCOME

<b>Total Income</b>	3rd Quartile	\$80,502
	Median	\$70,457
	1st Quartile	\$63,000
<b>Profit Distribution</b>	3rd Quartile	N/A
	Median	N/A
	1st Quartile	N/A

# DYNAMIC DUO



Stephanie  
Bogan



Odaliza  
Martinez



1

Clarity: common language  
(standards and systems)

2

Transparency: view of priorities and  
status (Asana, Inbox, #sdh)

3

Accountability: systems to support  
(Steph Daily Huddles, Asana)





TIME



SCHEDULING



BUSINESS



TRAINING



MANAGING

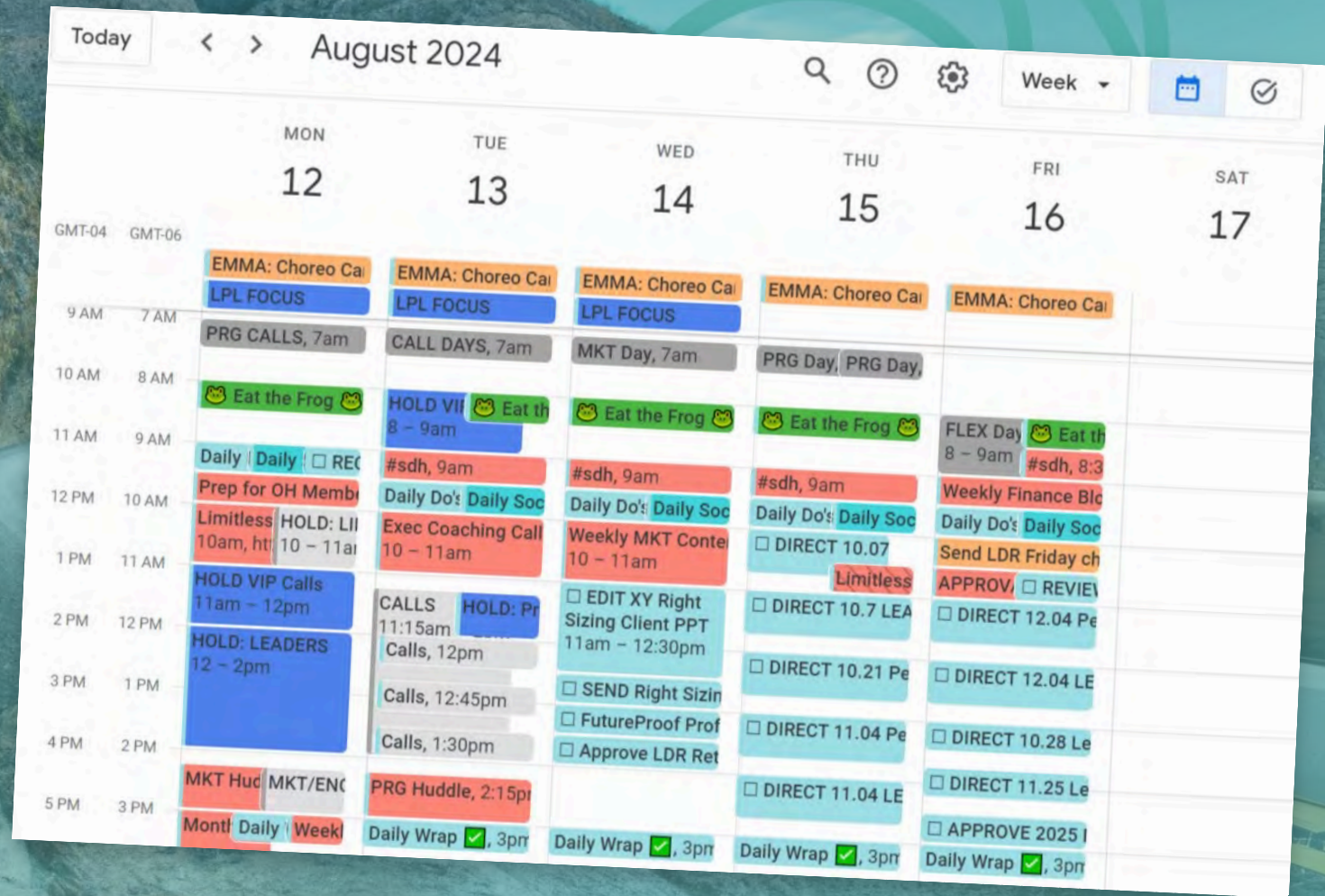
"EXCELLENT LEADERS AREN'T SPECIALISTS, THEY ARE GREAT PLATE SPINNERS."



GROWING

# WHAT WORKS: Provide a Roadmap

- Committed
- Personal
- Travel
- Reschedule
- Leader Time
- Team Meetings
- Scheduling
- FlexWork
- Program/Content
- Member Time
- HOLD Time



We are looking for a superstar to act as an Executive assistant to the CEO.

**Executive Assistant** - As the Executive Assistant at Limitless, you will be performing more than administrative tasks; you will be the awesome CEO's "right-hand person" who enables them to advance company initiatives and goals. You will filter and attend to the day-to-day functions that are part of the CEO's role so that she can focus on the high-level leadership and strategy functions.

- Manage scheduling for CEO (including speaking engagements)
- Draft, review and send communications on behalf of CEO
- Organize and prepare for meetings, including gathering documents and attending to logistics of meetings
- Answer and respond to phone calls, communicate messages and information to the CEO
- Prioritize emails and respond when necessary
- Coordinate travel arrangements
- Maintain various records and documents for CEO

## EXECUTIVE ASSISTANT CHECKLIST STANDARDS OF PRACTICE

### DAILY CHECKLIST

**DAILY PREP** 8:00 - 9:00 a.m. MT

#### REVIEW DAILY CALENDAR

Review Stephanie's daily calendar for today and the following 3 days minimum.

- Confirm all work blocks fully prepped and linked to Asana per SOP Stephanie Scheduling
- Move incomplete work block from the previous day forward.
- For work blocks not prepped, turn lavender and message the tasker to reset when ready.

#### ASANA REVIEW for Stephanie

- Check Asana for overdue and new tasks for Stephanie; Make sure tasker calendared correctly with enough time.
- Check Asana tasks for the week; confirm all calendared or message tasker
- Send text for any critical activity reminders.
- Update Asana with daily hot pad items.
- Let Steph know when no time for tasks.

#### EMAIL REVIEW for Stephanie

- Check Stephanie's email inbox

The screenshot shows two Asana task lists. The top list is titled "sdh, Steph Daily Huddle" and includes sections for "TOP OF BOARD", "UPCOMING EVENTS", and "TEAM ISSUES". The bottom list is titled "Onboarding: Liza Martinez (EA: Asst)" and contains a series of tasks such as "New Employee Set Up: 1 week prior to start date", "Build training plan", "Add Zoom User", "Provide access to Airtable", "Add to all the recurring team meetings", "Review Training Videos (as applicable)", "Share Coaching login Keep", "Forms & paperwork (Upon Acceptance)", and "Training & VI Check-Ins". Each task is assigned to a team member and has a due date.

### HOW TO PROCESS STEPHANIE'S EMAIL

You are to thoughtfully read each email and identify how to process it and the action needed:

- **You can handle the email, and do so**
  - File in **1-TODAY** and note with , then update Asana as needed.
  - Stephanie reviews this folder daily and this lets her stay informed of where things are.
  - *Stephanie emails someone saying she wants to set up a call, they reply back "yes". You respond, schedule the call and file in "Today" so she can see it was done; you update Asana to note the call details, add any new tasks and next steps or follow-ups are captured.*
- **Stephanie needs to reply to you or email sender OR to read the email to be informed on current matters**
  - File in **1-TODAY** with (noting reply needed) or (noting FYI), update Asana.
  - If you need a reply or timing is urgent, add to Steph DCI in Asana to discuss in next DCI or Daily Wrap.
  - *Someone replies to Stephanie with notes they can't schedule as she's hoped. You file the email in "Today" with so Stephanie can reply directly or to you with next steps.*
- **Stephanie needs to take action or do work related to the email**
  - File in **3-ASANA/WB** and mark (noting it's been captured in Asana and WB scheduled)
  - File in **1-TODAY**
  - This will be related to current clients or ongoing activities. You need to stay apprised of Stephanie's priorities and projects, goals and timelines and what she wants/needs to do with each on an ongoing basis so that you can schedule and manage work as needed. This is a key function of the role and this "knowing" will come through your Daily Check-Ins with Stephanie.
  - All attachments, resources or notes pertaining to the task or calendar work block are to be put in **Asana** card for that project/client and task set on Stephanie's calendar. Then, cut and paste a link to the Asana card/task

The screenshot shows an email inbox with a sidebar menu containing "Inbox", "Starred", "Sent", "Drafts", and "More". Below the menu, there are labels: "1: TODAY (Steph Attn)", "0 - Hiring", "0 - SDH, Steph Daily ...", and "1 - EA: In process".

# IN THE TRENCHES

sdh, Steph Daily Huddle

Overview List Board Timeline Calendar Workflow Dashboard Messages Files

+ Add new Filter Sort Group by Hide Save view

Task name	Assignee	Due date	Project	Tag
<b>TOP OF BOARD</b>				
Leaders Weekly Check-in & Accountability Tracker			Leaders Friday Check-ins (2024)	8
Steph VIP Links				18
#SDH Agenda				2
Managers Meeting (monthly)				1
Birthdays List				10
Team Anniversary Board				4
Add task...				
<b>UPCOMING EVENTS</b>				
<b>TEAM ISSUES</b>				
<b>ISSUES / INCOMING</b>				
Prioritize Book Writing Project	Stephanie B.	Monday	Marketing	1
Coaching Training	Stephanie B.			1

- Inbox
- Starred
- Sent
- Drafts
- More

Labels

- 1: TODAY (Steph Attn)
- 0 - Hiring
- 0 - SDH, Steph Daily ...
- 1 - EA: In process



STANDARDS  
ALLOW US TO RESERVE  
& REDEPLOY ENERGY



# YOUR JOB: FOCUS ASST'S JOB: FACILITATE

- Initiative and organization
- Attention to details
- Prioritization & scheduling
- Positive relationships
- Staying one step ahead
- Guru-level gatekeeping

**#1 Rule for Success:**  
You need an EA that fits  
your style AND has the  
skills to do the job

**#1** skill is to THINK!



LIMITLESS Q&A

# BREAKOUTS

