

# LIMITLESS Coaching Call Transcript

August 5th, 2024  
Peak Practice  
Leaders Coaching Call

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00:14:05.260 --> 00:14:11.729

Allison Foulk: Today we have a bit of a special call. We have 2 guest

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00:14:11.770 --> 00:14:16.589

Allison Foulk: members and let's see. Oh.

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00:14:16.920 --> 00:14:27.447

Allison Foulk: our initial slide with your faces aren't here. Okay? Well, Robbie and John, you'll have to say hello, so everyone can see your faces.

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00:14:28.290 --> 00:14:29.460

John Bohnsack, CFP®: Hello! Hi!

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00:14:29.460 --> 00:14:49.729

Allison Foulk: We go. Robbie was a leaders member for 2 years. His dad. Chris is still involved in the program and he has gone through the limitless program is implementing surges, and will be sharing with you some of his strategies for success.

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00:14:49.880 --> 00:15:06.850

Allison Foulk: John, you have probably heard Coach Adam. Talk about frequently. John has been with Adam since 2021, and is really running their search process, and so he'll be going through behind the scenes. Sharing their process

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00:15:06.860 --> 00:15:19.560

Allison Foulk: workflows agendas. So we have a pretty behind the scenes. Call for you today as always, please feel free to ask questions. Make this as participatory as we can.

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00:15:20.235 --> 00:15:30.380

Allison Foulk: And so our 1st question, which we're just gonna round table and Stephanie feel free to chime in at any point, too, you are welcome.

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00:15:30.380 --> 00:15:31.800

Stephanie Bogan: I'm here. Yeah.

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00:15:31.800 --> 00:15:42.510

Allison Foulk: Okay, awesome. So we are gonna round table. Let's just go round. First, st we want to hear, are you surging? And if you are. What is your biggest struggle?

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00:15:43.700 --> 00:15:44.370

Allison Foulk: Oops.

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00:15:45.220 --> 00:15:46.979

Stephanie Bogan: Leanna, how about you and Travis.

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00:15:48.940 --> 00:15:51.790

Liana Poodiack: So we are not surging

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00:15:54.160 --> 00:16:02.549

Liana Poodiack: When we move to the new firm. That is going to be our priority to start everybody off or surging, probably

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00:16:02.620 --> 00:16:15.579

Liana Poodiack: like after the 1st quarter that we're there, we'll start with starting in with surge, so it'll be brand new to us, but with a new firm we feel that would be a good launching for the new clients.

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00:16:15.870 --> 00:16:19.759

Stephanie Bogan: It's a good launching point for a transition. It also gives you good time to prep.

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00:16:19.820 --> 00:16:29.040

Stephanie Bogan: So the surge lesson. But this call, as well, because it's recorded. And you guys can go back like, there's a lot of this, John and Rob. It's the particulars, right? It's

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00:16:29.490 --> 00:16:43.479

Stephanie Bogan: exactly how you Prepper Robbie was in John like how they're integrating with your tech, and they'll walk through that. So this will be a good one both the lesson and this one to note and go back. When you guys are ready to really start mapping it out. This will be great for you guys.

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00:16:43.820 --> 00:16:44.530

Liana Poodiack: Yes.

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00:16:45.050 --> 00:16:47.419

Stephanie Bogan: Kevin, how about how about you and Kevin?

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00:16:48.700 --> 00:16:49.750

Stephanie Bogan: The Kevins.

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00:16:50.590 --> 00:16:54.630



Kevin Thomas: Yes, we are surging. We have actually.

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00:16:55.010 --> 00:16:58.750

Kevin Thomas: I guess, for a couple years now, but we didn't do it

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00:16:59.120 --> 00:17:23.260

Kevin Thomas: right, I guess you could say, or as well as we did this past spring. So we we felt like we were really firing on all cylinders. We, you know, I think the key thing is getting your team prepped, and all the preparation and the sequences, and getting the processes set up like before you actually do the surge. But I feel like we did outstanding our team was on board. They loved it, or you know, it's made.

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00:17:23.410 --> 00:17:51.949

Kevin Thomas: It's made the efficiency of like the remainder of the year way more efficient, because now we have time for like prospecting and other like projects and stuff that we're doing. And we're not just meet, you know, we're not just meeting with, you know. Clients, you know, spread out all throughout the year, you know. So it's just very nice to have that from a organization standpoint, and like I said it was, it was it went really well for us. I'm sure we could definitely improve it or continue to improve it. But it was. It was definitely a good experience. The only thing I'd say that we

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00:17:52.070 --> 00:17:59.020

Kevin Thomas: struggle with which is kind of Stephanie, as you know, and a problem with us. We have so many clients. So we're, you know.

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00:17:59.200 --> 00:18:13.289

Kevin Thomas: doing our big kind of small client email kind of let go or kind of helping them find another solution this summer. So I think moving forward will be a lot better after we kind of get some of those smaller clients redirected elsewhere.

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00:18:13.900 --> 00:18:18.730

Kevin Thomas: so I'm excited for that. But no, it's it's been. It was. It was really really good experience this past spring.

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00:18:18.730 --> 00:18:26.405

Stephanie Bogan: Yeah, and you'll find we'll talk about the different like levels. You can go into it just like you really do just deepen those levels of mastery.

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00:18:26.850 --> 00:18:30.510

Stephanie Bogan: and it gets you basically just automate the entire financial planning process.

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00:18:30.510 --> 00:18:31.120

Kevin Thomas: Yeah.

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00:18:31.120 --> 00:18:32.750

Stephanie Bogan: Done, which is awesome.



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00:18:33.020 --> 00:18:33.880

Stephanie Bogan: Yeah, absolutely.

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00:18:33.880 --> 00:18:34.590

Kevin Thomas: Really.

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00:18:34.590 --> 00:18:35.790

Stephanie Bogan: And how about you guys.

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00:18:39.536 --> 00:19:05.210

Ed Woehlcke: Yes, we have been doing it for about 2 years. We obviously saw it 1st time around when we were with you guys back in 2,018. It took us a couple of years to do it. The only hiccup we have sometimes is just the scheduling part, just not getting, not filling it. I think we're working on that and trying to get more people in on the team involved in scheduling

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00:19:05.739 --> 00:19:20.719

Ed Woehlcke: whereas Kevin and I have been doing a lot ourselves up to this point. So but yeah, it's been, you know, to reiterate everything that was said, it's it definitely makes you more efficient the rest of the year. And it's it is a sprint during those times. And

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00:19:21.250 --> 00:19:29.390

Ed Woehlcke: just you feel like you come out of it, and you've accomplished so much, and then you can take a breath. So it it's been very helpful for us.

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00:19:29.390 --> 00:19:33.030

Stephanie Bogan: Good good to hear it, Ryan. How are you and Ron implementing it so far.

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00:19:36.920 --> 00:19:42.510

Ryan Wyatt: I I think we're kind of half half in, half out on it. We can you hear me? By the way? Yeah.

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00:19:44.250 --> 00:19:45.260

Ryan Wyatt: we.

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00:19:45.660 --> 00:19:47.730

Ryan Wyatt: We surge in terms of like

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00:19:47.930 --> 00:19:52.840

Ryan Wyatt: the focus of the meetings throughout the year and client segments.

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00:19:52.890 --> 00:19:56.150

Ryan Wyatt: But we try to smooth out like

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00:19:56.830 --> 00:19:57.920  
Ryan Wyatt: it's like.

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00:19:57.920 --> 00:19:59.290  
Stephanie Bogan: The intensity of it.

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00:19:59.290 --> 00:20:12.079  
Ryan Wyatt: Yeah, throughout the year, especially since I'll be taking a step back from working with clients. And we're going to be hiring, you know, service advisors and getting them to capacity. So that that's kind of going to be their primary focus throughout the whole year.

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00:20:12.380 --> 00:20:16.290  
Stephanie Bogan: Great. Well, that'd be a good conversation for John and Robbie in terms of how they're

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00:20:16.740 --> 00:20:24.629  
Stephanie Bogan: how they went from right. The principal doing it to the service advisor team, doing it right. And then right? They just continue to write it

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00:20:24.780 --> 00:20:30.879  
Stephanie Bogan: as you get to client capacity, as John will talk about it just becomes a right. Who who are you trading up or down

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00:20:30.920 --> 00:20:34.479  
Stephanie Bogan: to maintain your your revenue load relative to your client? Load

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00:20:34.690 --> 00:20:44.459  
Stephanie Bogan: so good! I think that'll be good for you guys to think about how to step into it, whether it's intense in terms of the number or a little bit more spread out. It's the system.

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00:20:45.185 --> 00:21:06.644  
Stephanie Bogan: The more you spread it out, the less efficiency you gain. But it's still a massive efficiency gain. We have people do them quarterly sometimes, and it's still a huge plus. So I think today's conversation will help for those of you who are working on it, because there's always stuff to improve, but as you're easing into it, or Leanna for you and Travis preparing for it.

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00:21:07.280 --> 00:21:17.339  
Stephanie Bogan: It's about figuring out what that model is, and then what's the right model for you in terms of number of meetings, and what to cover? And then how you ultimately transition that to other advisors

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00:21:17.705 --> 00:21:20.619  
Stephanie Bogan: which does create a lot of continuity in the firm. So

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00:21:21.106 --> 00:21:27.773

Stephanie Bogan: so we'll note that for you and Ron as well, and then who, I think a couple of people joins. We got you all for now. Okay,

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00:21:28.380 --> 00:21:31.500

Stephanie Bogan: should you want us to kick off Allison with John or Robbie?

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00:21:31.830 --> 00:21:32.740

Allison Foulk: Yes.

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00:21:32.740 --> 00:21:33.530

Stephanie Bogan: Alright!

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00:21:33.530 --> 00:21:36.619

Allison Foulk: They are ready to go through the process. If you, Robbie.

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00:21:36.950 --> 00:21:37.810

Robert Hansen, CFP®: Perfect.

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00:21:38.050 --> 00:21:38.959

Robert Hansen, CFP®: So as you guys.

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00:21:38.960 --> 00:21:47.069

Stephanie Bogan: If you have questions as we go, you can drop them in chat, but it's leaders. So plenty of time and small groups so feel free to just, unmute, and ask questions as well.

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00:21:50.520 --> 00:22:18.700

Robert Hansen, CFP®: So this is the best practice for the surge process, and it is a good reminder. We were talking about this in the lifestyle breakout the coaching call a little bit ago, and John just hearing some of the things you say as well. A lot of the pain points we've had with surges. After rereading this, it always points back to yes, if we actually implemented and follow the best practice, and did some of these steps, it would reduce some of the pain points we're having.

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00:22:18.710 --> 00:22:48.367

Robert Hansen, CFP®: So it is a really good process to go back to and stay up to date with. But the the big thing on it, I think, is the 4 main steps, the scheduling, the preparing, the meeting, and the follow up. Those are always a part of any search. They're gonna happen. And it's the kind of break out. The bullet points beneath them that really you can flex based on your company, the way your team works, how everything's set up and just make sure you're optimizing it for yourselves. But

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00:22:48.690 --> 00:22:56.460

Robert Hansen, CFP®: yeah, again, it's it's scheduling. You gotta make sure you're reaching out well in advance. You're really following a a schedule of

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00:22:56.460 --> 00:23:06.130

Robert Hansen, CFP®: 6 weeks out getting in touch with clients, getting them on the calendar, sending follow ups, maybe having phone calls for people that still haven't scheduled trying to

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00:23:06.130 --> 00:23:27.999

Robert Hansen, CFP®: get them into the search. Because, if not, you will have people that 2 weeks after the surge ended, said, Hey, life was busy. I never got back to you. I'm sorry. Can we get together? And it's just really frustrating. When that stuff happens, or because you can't just ignore that level of planning, you now have to fit that search conversation into the next search conversation with them.

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00:23:28.120 --> 00:23:57.609

Robert Hansen, CFP®: So gotta stay on top of scheduling, preparing as well. You gotta make sure the works done in advance because it can get really hectic. I'll go into today a bit of. We have a lot of surge meetings in each surge, and when you're trying to prepare, while also running the meetings and follow up for meetings that have already happened. You can quickly just lose track of everything and kind of get derailed on this. So, preparing well in advance, getting it as organized as possible.

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00:23:57.800 --> 00:24:22.220

Robert Hansen, CFP®: the meeting itself. Just make sure you're fully present, staying really on top of it, involved in the conversation, not again worrying about the other 3 steps of this process as much, just really making sure you're there with the client, because if you follow this process efficiently, you should be able to spend a lot of that conversation, just working on the relationship and spending time talking to them.

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00:24:22.460 --> 00:24:24.180

Robert Hansen, CFP®: and then following up

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00:24:24.270 --> 00:24:48.269

Robert Hansen, CFP®: one of the hardest things we've struggled with, absolutely especially myself, since I have a 2 and follow through from my Colby test. You gotta make sure you have somebody on the team that's leading that post meeting work, or it does get into. We had these incredible meetings, promising all these things. Clients loved us. We never followed up and did the work. So then they got mad at us, and we had to repair the relationship in the next surge.

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00:24:48.270 --> 00:24:56.559

Robert Hansen, CFP®: So just make sure you have people that are delivering what you're promising. And it's not just if you don't have people make sure you have the technology that can help you do it.

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00:25:01.160 --> 00:25:02.090

Robert Hansen, CFP®: I think that's.

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00:25:02.090 --> 00:25:03.649

Allison Foulk: Great thanks. Robbie.

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00:25:03.790 --> 00:25:04.440

Robert Hansen, CFP®: Yeah.



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00:25:05.190 --> 00:25:08.630

Allison Foulk: Alright! Anything to add here on the process slide, John.

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00:25:09.893 --> 00:25:20.260

John Bohnsack, CFP®: No, just like, Robbie said. Like those are definitely the 4 steps scheduling, preparing, meeting, and follow up. And then, as your business changes like our businesses

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00:25:20.300 --> 00:25:28.550

John Bohnsack, CFP®: completely changed in the 3 years I've been there. So well, the process is underneath it. How you execute it. And and that's so. That's okay. That's part of

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00:25:29.020 --> 00:25:30.809

John Bohnsack, CFP®: growing as a business. So.

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00:25:31.420 --> 00:25:40.070

Stephanie Bogan: Yeah. And I know, someone had mentioned issues with scheduling. Let's just take like, can we just take a couple of minutes to talk through

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00:25:40.430 --> 00:25:50.119

Stephanie Bogan: what I'll call kind of the learning points in each of those. So for scheduling, I know right. Adam's got that pretty nailed down at this point. Probably you guys have a pretty tight process.

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00:25:50.408 --> 00:25:56.860

Stephanie Bogan: Can you guys just talk a little bit? We'll go through the phases. But when you think about scheduling. What were the like we

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00:25:57.000 --> 00:26:09.484

Stephanie Bogan: anything you would share for anyone who's like, how do I get clients to schedule? What about the people that don't reply right away. I mean, I know, after a couple of cycles, people get really used to it, and they're just like, Oh, it's time again.

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00:26:10.310 --> 00:26:16.719

Stephanie Bogan: How are you guys handling the scheduling? Are you following up with people? If they don't schedule? You just want to talk a little bit about that step.

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00:26:17.820 --> 00:26:19.399

John Bohnsack, CFP®: You want to start, Robbie, you want me to.

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00:26:19.750 --> 00:26:20.890

Robert Hansen, CFP®: How you doing, John?

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00:26:20.890 --> 00:26:33.144



John Bohnsack, CFP®: Okay, yeah. So like on the slide. Here, we definitely do the email 6 weeks, 6 weeks out. And then we'll send a reminder for the the 4, the 4 weeks out.

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00:26:34.380 --> 00:26:38.609

John Bohnsack, CFP®: We will call the remaining clients. Kathy will call them once.

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00:26:38.660 --> 00:26:42.180

John Bohnsack, CFP®: and then, if she doesn't get a hold of them. I will do the final.

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00:26:42.440 --> 00:26:44.010

John Bohnsack, CFP®: the final call.

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00:26:44.130 --> 00:26:45.860

John Bohnsack, CFP®: And then at that point.

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00:26:46.180 --> 00:26:54.079

John Bohnsack, CFP®: we're not following up with them any anymore. We're saying we did all our work that we're going to do on.

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00:26:54.220 --> 00:27:02.040

John Bohnsack, CFP®: on, on that. And they don't, and they don't want to meet. And that's totally that's totally that's totally fine where we're where we're at. With that

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00:27:02.040 --> 00:27:31.169

John Bohnsack, CFP®: one thing that's worked well for us, and it happens it works well because of our niche, is pre scheduling so like at the end of our current meetings. Now we're scheduling our next surge on top of that. It works well because of our niche, because if you were our niche is optometrist, and if you ever go to your optometrist's office, they pre schedule your appointment for the next year, so it really matches what they do so like we just got lucky in that regard. And it just oh, like I do it. This makes sense. Why, my financial advisor

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00:27:31.170 --> 00:27:47.940

John Bohnsack, CFP®: would do it as well. We have about 60, 65% of them Pre scheduled so that even we just started that this last year. So that's even made scheduling even easier for us as well. We typically don't have a lot of people reschedule those

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00:27:48.070 --> 00:27:53.939

John Bohnsack, CFP®: those meetings, and we know life happens. But it's it's not enough that it's a quote unquote issue

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00:27:54.010 --> 00:27:55.799

John Bohnsack, CFP®: for us. We're we're not

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00:27:55.980 --> 00:27:58.870



John Bohnsack, CFP®: spending a lot of time dealing with issues like that.

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00:27:59.930 --> 00:28:01.140

John Bohnsack, CFP®: Oh, Stephanie, you're.

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00:28:01.140 --> 00:28:06.310

Stephanie Bogan: I I was gonna say optometrists because they follow a similar practice. It's really easy. But you would

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00:28:06.330 --> 00:28:23.166

Stephanie Bogan: think most people would be surprised how easy it is to get clients on board. Your 1st surge or 2 in particular, is where right you do a little bit more nudging, but by the 3rd one. People are like, Oh, the emails here. If I want a meeting, I need to click the link and right, and they get really used to it.

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00:28:23.430 --> 00:28:29.349

John Bohnsack, CFP®: Yeah. And I set it up, too. They said, oh, like clients were like, Oh, what's our next meeting? Or when we're onboarding? I said.

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00:28:29.665 --> 00:28:39.320

John Bohnsack, CFP®: come hell or high water. I want to meet with you in the spring and the fall, so I will. I'll say I'll annoy you until you respond, which is the email email call call

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00:28:39.750 --> 00:28:53.460

John Bohnsack, CFP®: but I said, after that I'm not going to follow up anymore. And then the other ones that we have for some of our clients, I said. It's completely optional. We'll ask once, and if you don't respond, we're just gonna move, move on. But that's kind of the expectations I said. So they know they're gonna

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00:28:53.760 --> 00:28:54.520

John Bohnsack, CFP®: get

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00:28:55.160 --> 00:29:00.630

John Bohnsack, CFP®: bothered, or whatever whatever word you want. A lot about the fall in this, in the spring, in the spring.

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00:29:00.630 --> 00:29:21.646

Stephanie Bogan: Yeah, setting expectations is really helpful. If you let people know you're gonna get these emails from us every spring and fall, because this is our meeting cadence. It helps us stay on top of taxes and planning. And people go. Okay. You know, they don't know any different. And and truthfully, unless you tell them they don't know that you're meeting with every other person in that same period of time.

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00:29:21.940 --> 00:29:38.446

Stephanie Bogan: They'll they'll start to, I mean they. I figured out the firm that I worked with, you know,



when I started 20 years ago, I was like, cause they had a presentation. I was like, Are you giving this to everyone? And they were like, yes, like, that's so smart. Right? Because the core conversation of what they wanted to talk to clients about really hadn't changed that much from client to client.

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00:29:39.030 --> 00:29:57.029

Stephanie Bogan: How do you, Robbie? Anything on scheduling on your end? That you would add, and then for each of you, what's the follow up like? If they is there a trigger like you can only miss X number of meetings before right. Somebody actually has to call and say, you're a client. We need to have a conversation with you once every

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00:29:57.430 --> 00:30:03.150

Stephanie Bogan: 2 years, like, what's the what's the trigger for, hey? You've said no to too many meetings in a row.

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00:30:03.410 --> 00:30:04.140

Stephanie Bogan: Yep.

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00:30:04.670 --> 00:30:06.189

Robert Hansen, CFP®: That's a great question.

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00:30:06.580 --> 00:30:34.690

Robert Hansen, CFP®: I'd say the scheduling. It's very similar, John, to what you're saying, for your process is we are trying to push them for meetings we do have a list of. We'll invite them once, and if they don't respond we'll try again for the next surge. But we're not pushing on too hard. But there are clients that we're we tell them we're gonna bother you until you get on there. We do track if they miss, because our 2 main surges for again our niche's positions. If they miss the tax planning surge.

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00:30:34.690 --> 00:30:54.290

Robert Hansen, CFP®: then we have that financial independence end of your surge, and we have the list of who did not respond and get into tax planning so that way. Our communications a little different of hey? We miss you last surge. We do need to get together before the end of the year. You need to schedule, and that really helps with those conversations, and

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00:30:54.290 --> 00:31:04.819

Robert Hansen, CFP®: they kind of solve themselves eventually a lot of times, because they'll get into that and say, Hey, I really wanted to check tax withholding. I was like. That's why we asked you 4 times to meet in May and June.

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00:31:05.480 --> 00:31:33.829

Robert Hansen, CFP®: And what are we going to do now at the end of October to adjust your tax withholding due by April. So it's 1 of those that it usually clears itself. But yeah, if someone goes, that's the only clients we've lost. Besides passing away over the last few years, there's been a couple that were like you just won't get into surge meetings, and we're doing everything we can to meet and work with you. But you respond once a year with some fire going on and ignore everything else. It's just not a bit, and we do part ways with them.

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00:31:34.130 --> 00:31:50.350

Stephanie Bogan: That's good. Well, and it does tell you right who's engaged? Who's not engaged like skipping? A meeting is fine. We're all busy skipping, you know, 3 or 4 meetings in a row is a red flag, right? That we need to be having a conversation with the client about right. They're planning and their level of engagement.

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00:31:50.570 --> 00:32:17.204

Stephanie Bogan: Yeah, so I think important points there, one the 1st time you implement surges. Right, you'll send out the links and and people will be getting used to it. So you do wanna make sure you've got diligent. Follow up to John and Rob's point, if you can. At the end of meetings. Be like, Hey, let's go ahead and schedule your date, or here's the link for next year's, you know. Next, you know, falls meeting people will absolutely get in the habit of that.

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00:32:17.500 --> 00:32:18.300

John Bohnsack, CFP®: Yep.

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00:32:18.300 --> 00:32:24.589

Stephanie Bogan: So it just become like this is the thing to keep in mind is you're training everyone. You're training yourself

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00:32:24.830 --> 00:32:34.509

Stephanie Bogan: right? What do I need to do. You're training the team. What do they need to give me? What do I need to give them? Right? So that this kind of circuitous loop works.

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00:32:34.530 --> 00:32:56.110

Stephanie Bogan: And then we're training clients to, hey, we're, gonna you know. You may have noticed we meet twice a year. We're gonna try and organize those into the spring and fall because we want it. Right? People go. Okay, that's fine. We have people shift to surges, and they don't even tell people that they're shifting to surges. It's just hey, we're gonna start using this automated link. Right? So you have better. You know you, it's easier to schedule. And people go. Okay.

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00:32:56.441 --> 00:33:13.029

Stephanie Bogan: To Robbie's point. Very. Very infrequently. Will you get resistance to the surge itself outside of a hey? I can't make a meeting time. So I'd love to know? Like for people that can't meet in surge windows. Do you have other periods? Do you? Do you one off?

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00:33:13.200 --> 00:33:16.250

Stephanie Bogan: Do you tell them they have to wait till the next surge. If they call in the middle.

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00:33:18.360 --> 00:33:18.970

Robert Hansen, CFP®: We?

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00:33:20.370 --> 00:33:26.070

Robert Hansen, CFP®: It's a bad answer, but it it depends. We have been trying to so

235

00:33:26.080 --> 00:33:43.559

Robert Hansen, CFP®: kind of like, I said a little bit earlier. We switched actually the preparing stage with the scheduling stage that way. We're preparing everyone's search plan before inviting them on the calendar because we're only shooting for about 80% of clients to actually sign up for a time slot. And

236

00:33:43.850 --> 00:33:55.000

Robert Hansen, CFP®: the nice thing about doing that is we're still delivering some kind of loom video, summary plan to the people that didn't get on the schedule. So I feel like we're still adding value and

237

00:33:55.030 --> 00:34:04.199

Robert Hansen, CFP®: touching base, giving them something that they can walk away with. But it kind of helped us calm down a little bit of like, why won't they schedule? We're mad at them. It's like, yeah, life gets busy.

238

00:34:04.200 --> 00:34:10.230

Stephanie Bogan: So you're oh, so you're doing. Yeah, the prep in advance. The cool thing about that is to Robbie's point

239

00:34:10.330 --> 00:34:11.819

Stephanie Bogan: with loom.

240

00:34:11.900 --> 00:34:26.800

Stephanie Bogan: Everyone gets that touch. I suspect I suspect you'd actually have a few more people be like, Yeah, I'm busy. I got the update. It's good which can be good in terms of right. We only have meetings. If we need meetings again. We're just watching that cycle to make sure they're not

241

00:34:27.130 --> 00:34:39.280

Stephanie Bogan: right, missing too many, because then we want to make sure that, like we want them to be to know that we're doing it. But we still want to talk to them at least once every 12 to 18 months. So they know where the humans behind the behind the awesome.

242

00:34:39.460 --> 00:34:58.930

Robert Hansen, CFP®: Yup, and some of our little videos have literally been, here's this plan. But you have a huge tax withholding issue. We just can't check it because you wouldn't give us a pay stub or get on the schedule. And it is what it is, unless you get back to us like kind of thing, and then they do. They almost always immediately respond to that kind of video coming over.

243

00:34:58.930 --> 00:35:16.112

Stephanie Bogan: Yeah, it's I like it because it's just. It's a personal touch. Loom is so good for that. But it's so efficient you can. If if you get Peter Lazarov and some of the other top top advisors out there in the big big firms, he did an article, and it was last year, and I had a follow up conversation.

244

00:35:16.450 --> 00:35:19.050

Stephanie Bogan: He just calls his top 20 clients once a month.

245



00:35:19.500 --> 00:35:38.469

Stephanie Bogan: and, like the meetings, just started to like go away. It'd be like they'd schedule a meeting, and then they'd be like, we don't need a meeting anymore. We talk to you every month. And it really is just the relationship equity there is built up so high. So looms kind of do that like, Hey, we've checked in everything's on track. Or here's what we need from you. It is like a mini

246

00:35:38.580 --> 00:35:42.589

Stephanie Bogan: review check in pre the review. So it's I like that step.

247

00:35:43.750 --> 00:35:48.100

John Bohnsack, CFP®: I think 80% of clients responding to the positive was is about

248

00:35:48.260 --> 00:35:51.440

John Bohnsack, CFP®: is about right. So if you're doing over that

249

00:35:51.930 --> 00:35:55.330

John Bohnsack, CFP®: congrats, I want to talk to you. But if you're

250

00:35:55.530 --> 00:36:01.120

John Bohnsack, CFP®: but if you're if you're at that, I think that's a great expectation. You're not gonna get a hundred percent.

251

00:36:01.120 --> 00:36:25.439

Stephanie Bogan: Yeah, you're never gonna get a hundred percent. So you each of you like to John's point, you figure out where your point of nag begins and ends it. It's just clear expectations, hey? We've reached out to you twice. We haven't heard back. If everything feels good, you know, we'll see you at the next meeting. We just want to remind you right, we're here, and we're doing our work. And it's all important. What you'll find is your teams. As you start to go through this.

252

00:36:25.480 --> 00:36:38.909

Stephanie Bogan: these paths become very clear and calendly. And like, you can solve that with, okay, here's the email for people who scheduled. Here's the people for email who haven't scheduled. Here's the email, right? Here's the last chance email. And the team

253

00:36:39.020 --> 00:36:47.079

Stephanie Bogan: just handles that seamlessly. So that is the advisor. You're not worried about any of those details. You're just showing up and handling the client meetings. So

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00:36:47.360 --> 00:36:49.529

Stephanie Bogan: there's a lot that you can do

255

00:36:49.590 --> 00:36:59.379

Stephanie Bogan: in scheduling and and Robbie's example in prep, to take 80% of the heavy lifting out of the typical process or the typical meeting



256

00:36:59.390 --> 00:37:18.529

Stephanie Bogan: which is great for your team, but also great for your meetings, because it means that you're actually talking about focused things that are really intentional in a purposeful way, and the rest of the meeting is, how's it going? What can we do for you? Right? And and that is John and Robbie. We talked about this in lifestyle

257

00:37:18.860 --> 00:37:25.919

Stephanie Bogan: just around what you're presenting in the meeting. So I know you guys are going to do a little bit of show and tell there, I'll I'll save those comments, for after

258

00:37:26.620 --> 00:37:28.980

Stephanie Bogan: Anyone have issues with, follow up

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00:37:29.260 --> 00:37:34.120

Stephanie Bogan: for those of you who are using or half using surges.

260

00:37:37.630 --> 00:37:45.940

Stephanie Bogan: This is the part, Leanna, for you and Travis Brian. I don't know how you guys are. The follow up is the part that really foils people up

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00:37:46.409 --> 00:37:54.520

Stephanie Bogan: cause we talk about it. But if you're not paying attention, it's easy to miss, which is, you don't want to have everything from those meetings due immediately.

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00:37:55.093 --> 00:38:05.059

Stephanie Bogan: And that's where we use what we'll call the bucketing strategy no different than investments with time horizons. It's at the end of the meeting you want to recap.

263

00:38:05.160 --> 00:38:10.670

Stephanie Bogan: Right here are things we talked about. Here are the next steps, and you're going to bucket those next steps

264

00:38:11.154 --> 00:38:19.555

Stephanie Bogan: typically into 3 categories. Hey, this is something we need to take care of in the next couple of weeks. Right near term. Important has to get done in the next 30 days.

265

00:38:20.020 --> 00:38:23.590

Stephanie Bogan: Right? Those are right. The team's gonna take care of this right away.

266

00:38:23.760 --> 00:38:35.649

Stephanie Bogan: Next things for next meeting, hey? This, you know. Blah blah on the house. Let's we want to take some time to look at that. We're going to add that to our meeting in the fall we'll be reaching out to get prepared. Okay, great



267

00:38:35.921 --> 00:38:54.999

Stephanie Bogan: this and this right, the beneficiary change. And let's open another account, or do a 1031 like, let's get this thing done over the next couple of weeks, and the team will reach out and we can start to tackle these things so we can make sure that everything's wrapped up over the next couple of months. Does that sound? Okay? And 9 times out of 10 the clients gonna go. Okay.

268

00:38:55.030 --> 00:38:56.440

Stephanie Bogan: unless

269

00:38:56.940 --> 00:39:07.820

Stephanie Bogan: there's a timeline that doesn't work. In which point they're going to tell you which is exactly what you needed. Hey? I actually need to get this done by July. Okay, great. We'll push that to the top of the list.

270

00:39:08.360 --> 00:39:13.149

Stephanie Bogan: So one, as John mentioned, setting expectations on the front end

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00:39:14.050 --> 00:39:17.720

Stephanie Bogan: and setting expectations at the end of the meeting

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00:39:18.020 --> 00:39:31.040

Stephanie Bogan: super helpful, so that your team doesn't have right. When we talk about surges. It's the meeting schedule that's hard for you to keep pace with, depending on how many you schedule. Remember, you can schedule 3 is easy. 6 is a lot.

273

00:39:31.270 --> 00:39:46.810

Stephanie Bogan: right? So it's kind of like building a muscle. Start at 3. Work up to 4 right? If you can get to 5, Great Robbie and Chris, do 6. If you're like hyper efficient, and you have a very specific niche, you can get to 5 or 6.

274

00:39:47.590 --> 00:39:53.434

Stephanie Bogan: Some people love it. Some people can do it like, I don't do 6 calls a day unless I actually have to.

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00:39:54.470 --> 00:39:56.540

Stephanie Bogan: Because by 6. I'm like.

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00:39:56.990 --> 00:40:05.799

Stephanie Bogan: I just need that time to breathe in between 4. I can do no problem when I search leaders. Calls like 4 is a standard day.

277

00:40:05.980 --> 00:40:16.079

Stephanie Bogan: and then I can do 5, and if I need to do 6 I can. But the thing is, I don't do anything else on those days like nothing else, because it's really intense focus.



278

00:40:16.240 --> 00:40:19.109

Stephanie Bogan: So surges is like you're at the Olympics

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00:40:19.310 --> 00:40:26.640

Stephanie Bogan: right before and after is all the training and prep to make sure right that the performance goes really, really? Well.

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00:40:31.760 --> 00:40:39.450

Stephanie Bogan: let's go back to John and Robbie. I think you guys were going to share your actual. What are your surge schedules.

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00:40:40.770 --> 00:41:00.500

John Bohnsack, CFP®: Yeah, so like on this on this slide, we're just kind of talking about like what you just mentioned, Stephanie, is this your comfort level, like I did 8 meetings last week, but I particularly like doing probably 4, 3, or 4 a day. But you know, just working out the math of how many you want to meet per day per week. And then how many

282

00:41:00.700 --> 00:41:09.170

John Bohnsack, CFP®: meets you have? And you can figure out how many weeks that's gonna take I mentioned this the pre previous conversation today. But I like to take a

283

00:41:09.250 --> 00:41:20.530

John Bohnsack, CFP®: break. If we're doing over like 9 weeks for example, I'd take a break and maybe week set 5, and then maybe another week 8, just to give me some breathing room in regards to

284

00:41:20.940 --> 00:41:24.039

John Bohnsack, CFP®: follow up in meeting with clients, and I'm

285

00:41:24.390 --> 00:41:28.240

John Bohnsack, CFP®: kind of an introvert. So I do need a little of a mental health break there from

286

00:41:28.260 --> 00:41:29.549

John Bohnsack, CFP®: meeting with all

287

00:41:30.210 --> 00:41:32.520

John Bohnsack, CFP®: all the clients. In such a short time.

288

00:41:33.440 --> 00:41:35.950

Stephanie Bogan: Yeah, Robby, you're doing 5 or 6 a day right.

289

00:41:36.110 --> 00:41:44.610

Robert Hansen, CFP®: Yep. And we because we've been doing it for a few years. We've done the 3 a



day. We've actually, I think, tried every combination of this

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00:41:44.730 --> 00:41:53.739

Robert Hansen, CFP®: and I. And this is all, I think, personal preference, but I felt like 4 or 5 a day led to 8 to 10 week surges which.

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00:41:54.493 --> 00:42:02.766

Robert Hansen, CFP®: give you enough capacity each day to just be really inefficient at anything else going on in work and life.

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00:42:03.260 --> 00:42:23.439

Robert Hansen, CFP®: And the 5 to 6 meetings a day, really condensed our searches down to the 7 weeks with that one week right in the middle that no meetings total break to catch up on everything. So yeah, it just makes it more efficient, for I get to hang out with all of our clients all my friends all day long, and then

293

00:42:23.510 --> 00:42:27.079

Robert Hansen, CFP®: get over the search quickly, so we can get back to everything else going on.

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00:42:27.080 --> 00:42:35.120

Stephanie Bogan: Yeah, you do, I find? I have this debate. When I look at my calendar I tend to have a bit more flexibility. But

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00:42:35.776 --> 00:42:55.100

Stephanie Bogan: you! It is kind of like anything that you do like running, or if you've got a sport or a hobby like it's it's a lot of work at 1st to do those 3 or 4 meetings. Once you've got the process down and the teams got it down to Robbie's point, your brain does it again. As long as it's

296

00:42:55.110 --> 00:43:01.350

Stephanie Bogan: right. It's not like lifestyle, or you just only want to do the 3. Your brain starts to go. I could do 4 a day.

297

00:43:01.530 --> 00:43:11.180

Stephanie Bogan: and then it would go from 9 weeks to 8 weeks, and then you're like I could do 5 a day, and it would go from 8 weeks to 7, you know, like your brain starts to look at things

298

00:43:11.230 --> 00:43:31.110

Stephanie Bogan: in terms of do I want to search for 12 weeks or 8 weeks. Well, I could do 4 meetings a day, but if I do 5, and that's where you're really just getting into mastery right to Robbie's Point. If you have 4 meetings a day. Technically, that's not more than 4 h. If you're doing it really right with your breaks in between like you still have time to kill

299

00:43:31.190 --> 00:43:39.739

Stephanie Bogan: on other things. But if you put 5 or 6 meetings in like, you have time for nothing else which is kind of the goal, and then you have a lot of time the rest of the year.



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00:43:39.810 --> 00:43:44.910

Stephanie Bogan: So it's about how much you want to intensify those surges. But

301

00:43:45.120 --> 00:43:59.980

Stephanie Bogan: what's most important is that you have a structure. You get the systems down with the team, and then you can. I think I shared. Ben Brandt, for example, started with quarterly surges, and then went to midyear surges because you just wanted to see how that cadence felt with the team.

302

00:44:00.412 --> 00:44:09.189

Stephanie Bogan: We have clients who surge one or 2 weeks a quarter. They just break their clients into like 2 batches. So it really depends on lifestyle and preference.

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00:44:09.360 --> 00:44:20.647

Stephanie Bogan: A lot of our advisors with young children tend to spread them out a little bit more. Just because if you're out sick for a few days, you've missed 15 meetings or something.

304

00:44:21.289 --> 00:44:42.069

Stephanie Bogan: So it there is no right or wrong. 3 is good, 6 is bad. It is absolutely what is the pace and the cadence that you and your team can start at. And then, as you've heard, both John and and Robbie say, you just you perfect it. And you really hone those skills over time, and it gets easier and easier and easier.

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00:44:42.580 --> 00:45:08.120

John Bohnsack, CFP®: And Stephanie to add one thing to that, too, and it depends on where your business is at too like. For example, when I started with Adam. I was working with 50 clients, and we were onboarding 2425 clients per year, and so I needed more space for onboarding clients. Now my, my book is basically full. And so when I'm surging, I'm just meeting with repeat.

306

00:45:08.590 --> 00:45:14.219

John Bohnsack, CFP®: yeah, clients or clients of prior relationships. So it's much easier than those new ones.

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00:45:15.280 --> 00:45:27.780

Stephanie Bogan: Now, are you guys surging in? Are you able to take on more clients because you're alternating surges? Or are you just maxing surges and focusing on other things during the downtime, from a service advisor, perspective.

308

00:45:28.856 --> 00:45:29.990

John Bohnsack, CFP®: For me.

309

00:45:30.090 --> 00:45:50.120

John Bohnsack, CFP®: For me, I'm focusing on other things like I'm making another. I'm working. Adam and I are working on another business line revenue line right now. So that's been kind of my focus. Where Kate, as you can see in the slide here she we trained her up to the point where she's taking on



relationships. So her schedule is free to to build.

310

00:45:50.240 --> 00:45:53.030

John Bohnsack, CFP®: to build her book to what it she wants it to be.

311

00:45:53.640 --> 00:45:56.760

Stephanie Bogan: Yeah. And just for those of you that have service advisors.

312

00:45:57.110 --> 00:46:12.989

Stephanie Bogan: As each service advisor gets full right, you're hiring ahead to the next person, and then they become the onboarding advisor. So that, like, for example, John is, and Adam aren't getting interrupted by onboarding, because right, that next person sitting in that seat.

313

00:46:13.020 --> 00:46:42.209

Stephanie Bogan: and once the quote, the the close has been made right. Then Kate will pick up, take them through the onboarding process, and then they naturally become her client. And we just repeat that cycle until she hits X percent of capacity right? And then we hire the next onboarding slide right and then just fill them up, add the next income engine, fill them up, add the next income engine, so it solves. It solves for that onboarding crunch, which is one of the big problems Adam had when the growth engine really started to work is now I've got all these clients.

314

00:46:42.640 --> 00:46:55.199

Stephanie Bogan: I have no time. And then John had time right, he gets filled up. And so now that model is essentially built, and Adam just decides how many advisors he wants to expand to depending on right how big a firm he wants to lead.

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00:46:55.880 --> 00:46:56.560

John Bohnsack, CFP®: It's exactly.

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00:46:56.560 --> 00:46:59.159

Stephanie Bogan: Bigger, I suspect, would be bigger than he says.

317

00:46:59.700 --> 00:47:00.510

John Bohnsack, CFP®: I.

318

00:47:01.040 --> 00:47:05.325

Stephanie Bogan: It is. Michael and I had a good debate about that. We're like, I'll watch this. It's gonna be funny.

319

00:47:06.410 --> 00:47:08.929

Stephanie Bogan: Yeah, we already know what challenges he's gonna have before

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00:47:10.828 --> 00:47:13.700

Stephanie Bogan: the high quality problems that come with great.



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00:47:13.700 --> 00:47:15.049

John Bohnsack, CFP®: Yeah, it's like, yes, let's.

322

00:47:15.050 --> 00:47:16.500

Stephanie Bogan: We call them hiccups. High quality.

323

00:47:16.500 --> 00:47:17.475

John Bohnsack, CFP®: Yeah.

324

00:47:18.740 --> 00:47:36.920

John Bohnsack, CFP®: Well, I'll go ahead and search search. Show my show and tell here about the things that we do. There was our team there. So it's myself as a lead advisor Kate, who's our service advisor like? I said, going into a lead advisor role. And then Kathy, who is our

325

00:47:37.200 --> 00:47:49.820

John Bohnsack, CFP®: heart and soul of our organization, who runs a lot of these things, and we're very, very, very, very lucky to have her as part of our team. But let me share my screen here.

326

00:47:54.170 --> 00:47:56.269

Stephanie Bogan: We'll not talk about Kathy retiring

327

00:47:57.550 --> 00:47:59.909

Stephanie Bogan: not to talk about it.

328

00:48:00.850 --> 00:48:02.999

John Bohnsack, CFP®: So this is actually our

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00:48:03.170 --> 00:48:21.890

John Bohnsack, CFP®: workflow for this. So we use Redtail, we're a big, heavy retail user. And so this is how it comes into our retail. So we decided we're starting surge. We decided that we're gonna reach out to all of our clients. So Kathy's made that

330

00:48:21.910 --> 00:48:51.252

John Bohnsack, CFP®: invite and ask, and so, as clients come in and say, Yes, we're ready to meet. This is where this workflow would get kicked off. So Kathy, her term in our system is client service. She's gonna copy and paste that information from the activity like client wants to meet on this date at this time, via this way, typically zoom and the client wants to talk about this particular subject.

331

00:48:52.070 --> 00:49:11.910

John Bohnsack, CFP®: we obviously modify the dates, so the dates show up at the proper the proper time here, and then add items to the agenda. So client in their input form when they set the meeting, either by phone or by acuity we use. They can say, Hey, I want to talk about my kids. 5, 29 plan. I want to talk about adding



332

00:49:11.960 --> 00:49:25.550

John Bohnsack, CFP®: another practice. Whatever here. So we'll make that. And then Kathy will prep. A thank you email confirming the the date time and that the items have been added to agenda with a very

333

00:49:26.590 --> 00:49:33.279

John Bohnsack, CFP®: white agenda of just the big areas, the 5 areas or 6 areas of financial planning that we'll cover during the meeting. So.

334

00:49:33.280 --> 00:50:02.160

Stephanie Bogan: Clarifying operational question when those items are added to the agenda. I don't know if all of you were doing that. I am a huge fan of sending the meeting agenda out a couple of weeks in advance, saying, Here's what's on our agenda. There's anything that has your attention that you'd like on the agenda. Please let us know one. It makes you look really on top of it, 2 to John's point. They will tell you things, not all of them, but some of them. And when they raise their hand to tell you something, it's because it matters

335

00:50:02.160 --> 00:50:31.159

Stephanie Bogan: so. All like to ask before the meeting versus in the meeting makes you look more proactive, too. It gives you an opportunity to prepare if such an opportunity is helpful. And that was my question, John. Right, hey? I want to think about buying. A practice is different than I need to know. If I should add a wing on the house, or XY, or Z. My famous favorite example is, we had a client years ago who sent out the letter, and it was, Hey, we just found out, mom needs to go into a home.

336

00:50:32.000 --> 00:50:50.689

Stephanie Bogan: And right, we're really worried about like how that's gonna play out. And then, of course, they have a relationship with the client comes to the right attitude comes to the weekly meeting, and it's and then the principal was able to say, Okay, we know brothers and sisters have no money and are not great people. They're not going to help out.

337

00:50:51.099 --> 00:51:08.560

Stephanie Bogan: We know right? Mom's in a different state. So let's run cost of care for high medium and low price facilities in mom zip code and in client zip code. And then let's run right. The cost analysis of the impact of that on the financial plan. Right? Retirement, if we start to.

338

00:51:08.790 --> 00:51:24.684

Stephanie Bogan: So they do. This client comes in. This comes up obviously, 1st item on the agenda, and the whole conversation is, hey? We took some time. We ran the number. A client was like floor tears like, Thank you. Never leave bazillions of referrals every year.

339

00:51:25.210 --> 00:51:29.030

Stephanie Bogan: because they took the time to ask, and in this case do a little prep.

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00:51:29.230 --> 00:51:33.440

Stephanie Bogan: How do you guys? So that's a a long and loaded question. But



341

00:51:33.690 --> 00:51:44.489

Stephanie Bogan: how do you guys handle some things? Just need to go on the agenda. Some things like, Do how do you, surface? And, Robbie, if you have something similar, how do you surface that for

342

00:51:44.610 --> 00:51:56.569

Stephanie Bogan: Adam or Chris to say, Hey, I think we need to do. You guys do that do do like? What's the process when things get surfaced? Do they just go on the agenda or like, do you ever do advanced work? And is there a process around that.

343

00:51:57.360 --> 00:52:14.780

John Bohnsack, CFP®: I mean, it does come on to the agenda. If it's something big, Kathy, when she inputs it, she'll either flag it in the act on the workflow here to make sure I read it, or she'll she'll let me, she'll let me know, like a client recently what's going on.

344

00:52:14.990 --> 00:52:16.390

John Bohnsack, CFP®: We're getting divorced

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00:52:16.490 --> 00:52:18.950

John Bohnsack, CFP®: like that. What? So we had to kick.

346

00:52:18.950 --> 00:52:19.340

Stephanie Bogan: Like oh!

347

00:52:19.340 --> 00:52:23.979

John Bohnsack, CFP®: A whole yeah, a whole process. Because of, obviously, we have a fiduciary duty to both

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00:52:24.368 --> 00:52:45.679

John Bohnsack, CFP®: both clients in that case. And obviously they didn't want to meet together, so she'll let us know about that if anything big comes up there also show an agenda. So I'm trusting Kathy with her professional judgment in regards to what's something that's really big. And I'm gonna need some extra space to make a decision about, or what's something she can put on the agenda.

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00:52:46.110 --> 00:52:51.450

John Bohnsack, CFP®: What's the Ira contribution limit this year? Something really simple that doesn't need further thinking on it.

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00:52:51.450 --> 00:53:03.440

Stephanie Bogan: Yeah. And you mentioned in the call earlier, just right, the the symbiosis, like the relationship between you and the team, becomes really important. I think this is a a good example of that.

351

00:53:03.710 --> 00:53:05.179

John Bohnsack, CFP®: Yeah, absolutely.



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00:53:05.300 --> 00:53:07.093

John Bohnsack, CFP®: absolutely, absolutely.

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00:53:08.030 --> 00:53:09.680

John Bohnsack, CFP®: So sending the email.

354

00:53:09.740 --> 00:53:27.570

John Bohnsack, CFP®: then Kathy's just making sure that the links E money, or right capital or element. Whatever you're using is updated. If it's not working, she's just letting us know which ones are, we can decide if they're important or not, you know. Sometimes it's their kids savings account, which we didn't want the link, anyway.

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00:53:27.580 --> 00:53:50.118

John Bohnsack, CFP®: And so we're not worried about it. Sometimes it's their outside brokerage account with, you know 1.5 million dollars in it. And so we'll either press for the statement or make a decision on that. So we'll follow up with an email to the client saying, Oh, we really want that statement for your restricted stock units or something, or we'll just leave it as is

356

00:53:51.210 --> 00:53:57.839

John Bohnsack, CFP®: Kathy will process that paperwork, and then she'll prep any forms that are needed. So a lot of these are things that we can anticipate.

357

00:53:58.127 --> 00:54:11.530

John Bohnsack, CFP®: We know a client's gonna do a backdoor, Roth Ira, we're gonna strongly recommend it. We're not going to take no for an answer on that, because it makes so much sense. We'll go ahead and have Kathy do that journal journaling forms, money movements, anything like that that we might be

358

00:54:11.580 --> 00:54:20.069

John Bohnsack, CFP®: be missing, or some really low hanging fruit like they have a revocable trust, and we can change their brokerage account into that revocable trust.

359

00:54:21.170 --> 00:54:44.459

John Bohnsack, CFP®: here, this is where I'm really depending on my service advisor one. I view my service advisor as kind of a a guy. We're going through the jungle. She has a machete, and she's cutting all the leaves and branches down so I can clearly see the path and think of on a bigger picture. So that's where I'm trusting Kate, my service advisor, to do that. So she's running the financial plan, seeing everything. So I can think on a bigger.

360

00:54:44.460 --> 00:54:51.539

John Bohnsack, CFP®: on a bigger level like Stephanie. That's a great example there of someone, you know, Kate running the financial plan.

361

00:54:51.560 --> 00:54:57.009



John Bohnsack, CFP®: but just not thinking about the next step of like, okay, how do we run the long term care

362

00:54:57.110 --> 00:55:05.120

John Bohnsack, CFP®: scenario on that, and then, additionally, I have or utilize a meeting checklist which I will share here.

363

00:55:12.210 --> 00:55:41.850

John Bohnsack, CFP®: so cause we like to keep our red tail clean. You just can't make a checklist within a checklist. So here we created a separate checklist, just for the for the meetings of more detail on that. As Kate started, I my expectation for her was to print this out and like write notes and check check it off. Now that she's more experienced, and I have all the trust in the world with her. I just I just. I just expect that she's going through this, and I trust that she's she's doing that, and it's really easy.

364

00:55:41.940 --> 00:55:49.895

John Bohnsack, CFP®: If she were ever to miss it, which she never does, it'd be really easy to catch that she's not following the processes that I want her to.

365

00:55:50.200 --> 00:55:56.629

John Bohnsack, CFP®: I broke it out down into like foundations of what I call like like, why, the heck! Are we even meeting

366

00:55:57.000 --> 00:55:58.180

John Bohnsack, CFP®: so like.

367

00:55:58.260 --> 00:56:13.110

John Bohnsack, CFP®: what questions should we ask? What follow up should we have? Is there any measurable progress that they hit like a certain net worth level? They'll be surprised at. Maybe they just became a millionaire, and they didn't had no clue. Maybe they hit 5 million dollars and just

368

00:56:13.150 --> 00:56:24.530

John Bohnsack, CFP®: check everything here. This is with our niche practice management will ask for something just specifically for optometry. So I expect Kate to provide some of that data for me

369

00:56:24.750 --> 00:56:46.779

John Bohnsack, CFP®: debt management. There's always some categories that will be topical, depending on what's going on in the world. This one is with rising interest rates. We had a lot of Ods making extra payments on low interest, like a mortgage at 3%. And then they took an equipment loan at 8%. But they're making extra payments on the mortgage, not the equipment loan. So that's kind of topical

370

00:56:46.780 --> 00:56:57.180

John Bohnsack, CFP®: right now. Investment portfolio. This is my expectations that I have for Kate for reviewing that portfolio. I'll make the professional judgment if I want to cover that or not.

371



00:56:57.270 --> 00:57:05.510

John Bohnsack, CFP®: Some clients want to talk about it. Some don't. But I do want this information to figure out what? What if the portfolio is doing? We expect it to do

372

00:57:06.130 --> 00:57:31.540

John Bohnsack, CFP®: other information contributions, withdrawals from tax planning some estate, some insurance. And then I have re age related items is the client turning this specific age? And if so, what decisions have to make make with that popular ones, the 62. When most clients want to take social security, they don't understand how it works. 72 R. And D requirements are coming up, or the kids are turning 18 power of attorney

373

00:57:31.680 --> 00:57:39.980

John Bohnsack, CFP®: documents. So this is what we use. It's a living, breathing document. We'll change. We'll change it to improve it. To remove things

374

00:57:40.140 --> 00:57:48.060

John Bohnsack, CFP®: from it. But this is what we. This is my expectation that Kate does for my clients. So when I get

375

00:57:48.410 --> 00:57:58.570

John Bohnsack, CFP®: the advisor prep Review. I'm getting an agenda with all the items that I want to talk to her about it and think at a bigger picture and not worry about.

376

00:57:58.830 --> 00:58:01.899

John Bohnsack, CFP®: If the performance of the portfolio is on there or not.

377

00:58:01.900 --> 00:58:28.729

Stephanie Bogan: Yeah, it really lets you frame what you want covered in your quote model meeting the cool thing about that as you build it out as you've seen John do, and Adam right? Because they operationalize everything is, you're not necessarily going to have every section filled out in every meeting. But as you fill them out, you literally have a hey? It's the estate planning review meeting cycle. We're gonna fill up, you know, right? The team's gonna go through that that section of the checklist. Hey? It's

378

00:58:28.730 --> 00:58:34.659

Stephanie Bogan: tax planning or right valuation time. We're going to go through that that portion of the checklist. So you've got

379

00:58:34.660 --> 00:59:00.630

Stephanie Bogan: right. Your Crm managing right? The operational process. But the actual plan review that checklist is there to guide whoever's providing the plan review. And input so that there's a standardized way. This is where it gets really efficient. If you're doing this over and over and over right, it's like, Here we go again. You're gonna run. Everybody's age report, right? You're gonna have all that information. And you're gonna be able to

380

00:59:00.980 --> 00:59:22.170

Stephanie Bogan: right Kate in this example can prepare really efficiently. So we've created 2 levers of leverage right now, John Adam has John. John has Kate. Kate has right 6 standards, systems and processes saying, Focus here, do this. So we're not figuring it out each time. What does this client need? Which is where we lose

381

00:59:22.230 --> 00:59:31.059

Stephanie Bogan: 20 or 30% of the efficacy in most processes is right, figuring out the next step, customizing it to each client. This it's all done.

382

00:59:31.150 --> 00:59:39.799

Stephanie Bogan: and then you're customizing and personalizing that top tier of the experience, if you will, which just makes it just for a much more effective process.

383

00:59:40.100 --> 00:59:51.251

John Bohnsack, CFP®: Yeah, well, said, this is after the meeting. So we actually obviously meet with the client dictate notes which can be challenging. I just recommend that you get that done immediately following the meet

384

00:59:51.610 --> 01:00:05.139

John Bohnsack, CFP®: immediately when the meeting's done to do that, whether you're dictating it. Last meeting we talked about, we're starting to use AI for it. Robby's gonna talk about what AI they're using for dictating notes. That's another way to do that as well.

385

01:00:05.140 --> 01:00:28.129

John Bohnsack, CFP®: adding tasks to let the client know like when that's gonna get done and then getting the action items. I'm depending on Kathy and her professional judgment, and what I have in the notes to make sure what what things need to get done are getting into the Crm. At the time. I expect them to do that. We have expectations for that. So they set that calendar for me, cause I'm going into the next.

386

01:00:28.200 --> 01:00:31.160

John Bohnsack, CFP®: the next meeting, and I need them to organize that for me.

387

01:00:31.574 --> 01:00:40.040

John Bohnsack, CFP®: Everything else is just processing processing notes send email to clients saying when the next meeting was, if it was scheduled

388

01:00:40.070 --> 01:00:41.260

John Bohnsack, CFP®: and then

389

01:00:41.350 --> 01:00:42.940

John Bohnsack, CFP®: reschedule the appointment.

390

01:00:43.000 --> 01:00:51.240

John Bohnsack, CFP®: or next schedule next appointment. This is, if they don't show up for the

appointment, then we have a whole different process. But anyway, then the whole process kicks over again.

391

01:00:51.430 --> 01:00:52.830

John Bohnsack, CFP®: and then we're on to the

392

01:00:52.990 --> 01:00:54.399

John Bohnsack, CFP®: run to the spring.

393

01:00:55.105 --> 01:01:05.489

John Bohnsack, CFP®: The other thing. This is our sample agenda. I changed out the client names. But this is an example of what Kate prepared for me.

394

01:01:05.963 --> 01:01:12.129

John Bohnsack, CFP®: And so I was able to go through this, and then I would prioritize what I would want to talk about

395

01:01:12.240 --> 01:01:19.169

John Bohnsack, CFP®: with the client. But obviously we know maybe I want to talk about taxes, and the client wants to talk about

396

01:01:19.652 --> 01:01:27.559

John Bohnsack, CFP®: retirement, and so it throws the whole thing off. But I'll put it into an order that I want to cover and importance and take it from there.

397

01:01:37.160 --> 01:01:38.780

Allison Foulk: And, Steph, you're on mute.

398

01:01:40.545 --> 01:01:43.174

Stephanie Bogan: Do you have a sense?

399

01:01:44.410 --> 01:01:46.849

Stephanie Bogan: of prep time for Kate.

400

01:01:47.480 --> 01:01:50.250

Stephanie Bogan: and then prep time for you? Obviously it's.

401

01:01:50.250 --> 01:01:50.570

John Bohnsack, CFP®: You.

402

01:01:50.570 --> 01:01:51.799

Stephanie Bogan: Nominal for you.



403

01:01:51.970 --> 01:02:11.460

John Bohnsack, CFP®: Yeah, probably for me given where I'm at right now, probably 1515 min. If if that probably where Kate is right now probably 30 min, but when she was starting out I guess I my guess maybe be an hour. But that.

404

01:02:11.460 --> 01:02:20.992

Stephanie Bogan: Hour to an hour and a half. 1st out for sure. Yeah. And I ask, I mean, I I know the answers to these questions. But I ask, because in this case I want to really highlight

405

01:02:21.330 --> 01:02:39.979

Stephanie Bogan: how efficient it can be. There was a time when Adam was right. He had to build the system for him. Then they had to rebuild it for him. And John. Now they've added the 3rd layer, right? So Adam is really largely out of those. John is the lead advisor. Now he's got Kate as we talked about right, we'll replicate Kate over and over.

406

01:02:39.980 --> 01:02:52.189

Stephanie Bogan: And now the system is largely built. It's just right having an automated process and an and a review checklist for every single thing that could possibly ever happen. Which I suspect you guys are pretty close to at this point.

407

01:02:53.333 --> 01:03:14.586

Stephanie Bogan: And then what you heard, John and Robbie will talk about the same thing. They've got right all of this efficiency means they get to talk about things that are unique to their clients. So Adam has a whole because his clients are business owners for the most part right, his a whole layer of like looking at the business and practice management, the way that we do, which is hugely valuable to his clients.

408

01:03:14.910 --> 01:03:23.630

Stephanie Bogan: And they have time to do that. So one of the huge benefits of surges is, I always ask this question, how many of you spend as much time as you would like with your top clients

409

01:03:24.340 --> 01:03:38.020

Stephanie Bogan: right? And then we always tell the Gold Star story right? We're just not going to talk about all the reasons we don't right. The idea there is this lets you spend all the time that you need with your top clients. What you're gonna find

410

01:03:38.140 --> 01:03:49.299

Stephanie Bogan: is you don't need nearly as much as you think you do like the meeting. Prep for John for for not like a little client. He's not paying attention to like a client. Client is 15 min

411

01:03:49.300 --> 01:04:10.409

Stephanie Bogan: because all the prep is baked into the institutional systems. Adam sat down and spent hours going. I want it this way. And then we're going to click this button. Right? John sat down and built the review checklist that said, these are the questions we're going to use the age numbers. Here's how we're gonna do it. But once they've done that once.



412

01:04:11.180 --> 01:04:12.500

Stephanie Bogan: it's forever

413

01:04:13.130 --> 01:04:14.979

Stephanie Bogan: for every 3 years, right? You're gonna update.

414

01:04:14.980 --> 01:04:15.300

John Bohnsack, CFP®: Rob.

415

01:04:15.300 --> 01:04:21.769

Stephanie Bogan: Right, obviously, but it gets really efficient. It just becomes part of like, Hey, what's in the service? Queue this year?

416

01:04:21.790 --> 01:04:32.459

Stephanie Bogan: Let's refresh that part of the process. If you're spending more than 15 or 20 min preparing for client meetings that is, ding, ding, ding the bell. That says

417

01:04:32.910 --> 01:04:43.760

Stephanie Bogan: I'm over investing in meeting prep. And I will tell you as your consultant and coach. It's very likely not showing out the other side in value, and results

418

01:04:44.070 --> 01:05:10.069

Stephanie Bogan: not from a relationship standpoint and not from right, a plan or a return standpoint. So we just want to suck all that inefficiency out of the process. So model meetings surges. And then right that Mvp service model that you can build on from there. It's gonna get you 70% of the lift from surges. So, Leanna, for you and Travis, understanding you're waiting for you. Just one more thing of change.

419

01:05:10.080 --> 01:05:12.080

Stephanie Bogan: But on the other side.

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01:05:12.090 --> 01:05:26.120

Stephanie Bogan: this is priority one because you're getting platform effect, like, you guys really need to pull a lot of efficiency into the process. So when you're in the process of changing everything, you're so uncomfortable. Just change everything.

421

01:05:26.500 --> 01:05:36.760

Stephanie Bogan: But you've got a runway and a lot of experience in front of you. So you guys can skip 80% of right the painful learning process, as we like to say.

422

01:05:37.970 --> 01:05:43.187

Stephanie Bogan: Ryan, for you and Ron, we just need to get you fully into surges.

423

01:05:43.800 --> 01:05:49.139



Stephanie Bogan: whatever whatever that schedule is so that we can really commit. So we can get the gains. And Ed.

424

01:05:49.180 --> 01:05:59.469

Stephanie Bogan: you guys are doing them. If there's ways to optimize when we will do our check in here. Like, let's just talk about what right levels 2 and 3 where you are in that process.

425

01:05:59.620 --> 01:06:09.279

Stephanie Bogan: so we can continue to help you evolve to that greater specialization and optimization with automate right? They they start to intersect in a really.

426

01:06:09.350 --> 01:06:11.699

Stephanie Bogan: that's where service bottles get sexy

427

01:06:12.200 --> 01:06:26.119

Stephanie Bogan: right? Because all this stuff that John is talking about just happens right. Adam doesn't sit down and go. Oh, what's the client and their business? What do I have to do. It's all like. Here's how I want it, and it's ready for them. Robbie, you want to do a little show and tell for us.

428

01:06:26.640 --> 01:06:33.649

Robert Hansen, CFP®: Yeah, that'd be great sorry if I kept disconnecting. My Internet has just given up today. So.

429

01:06:33.650 --> 01:06:37.669

Stephanie Bogan: I had to get up and close the window, because we're having like a massive summer storm.

430

01:06:38.281 --> 01:06:40.809

Stephanie Bogan: thunder and lightning out my window.

431

01:06:41.550 --> 01:06:42.736

Robert Hansen, CFP®: Well, I

432

01:06:43.390 --> 01:06:56.059

Robert Hansen, CFP®: appreciate you bearing with me on this. If I do cut out, just let me know, so I can repeat it. But a little bit about the team, and I know some of you already. So it's good seeing you guys again. But for everybody else we do have.

433

01:06:56.100 --> 01:07:19.540

Robert Hansen, CFP®: 5 main members really involved in surges. We all have our different roles, and we also have 2 people not on here. I probably should have added them. I didn't think about it, but they're part time client service that are really helping, almost like administrative assistance, just getting all of the post meeting work done, because that was our biggest headache for the last few years.

434



01:07:19.610 --> 01:07:23.870

Robert Hansen, CFP®: So my main role just kinda

435

01:07:24.050 --> 01:07:34.529

Robert Hansen, CFP®: instead of getting into all of them is with client meetings. So because of that, we've done a lot of things to get me out of any prep.

436

01:07:34.971 --> 01:07:52.190

Robert Hansen, CFP®: Any communication on the prep. Side any post meeting work whatsoever. It's really, how can I just meet with as many people as possible in this surge to get the surge completed as soon as possible, is our big thing. While also leaving room for onboarding and growth.

437

01:07:52.190 --> 01:07:56.080

Stephanie Bogan: Yeah. And I just want to add here. And I know you all know this.

438

01:07:56.200 --> 01:08:07.039

Stephanie Bogan: But for as you build teams, they're really 2 people who love sitting across from clients. And if you have those people, they're so valuable because right.

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01:08:07.190 --> 01:08:34.479

Stephanie Bogan: they're sitting across from clients. And we wanna optimize every minute of their day. So we talked with this with with you about this back in May, with Michael. Remember the kinds of capacity we have our client capacity, like, how many client meetings can I have? Right? Had just a head count issue? You've also got revenue capacity. A \$105,000 clients is very different than a hundred \$50,000 clients, right?

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01:08:34.520 --> 01:08:58.319

Stephanie Bogan: And then you've got your optimization right? Are we using surges? Do we waste our time and email and those 3 factors determine how much each income engine Aka advisor produces for the firm at what profit level you hear stories of firms growing broke. They, it happens all the time, by the way, because that cycle we talked about from Adam to

441

01:08:58.319 --> 01:09:12.109

Stephanie Bogan: John to Kate, and that next hire. If you're growing at a certain rate. There, there's a like you can actually, right have more headcount costs than you have revenue coming in right because it takes a few years to catch up.

442

01:09:12.300 --> 01:09:27.109

Stephanie Bogan: And that's the cycle, as you all start staffing up when Michael said, It's staffing, staffing, and staffing. And then I drew that line and said, and optimizing, optimizing, optimizing the big mistake firms make is they don't optimize. The capacity of each advisor

443

01:09:27.359 --> 01:09:39.079

Stephanie Bogan: surges is one way to do that. So it's 1 of the levers we really do encourage you all to pull, because to Robbie's point, we want Robbie in as many meetings as possible, because that amps



444

01:09:39.100 --> 01:09:52.799

Stephanie Bogan: right his capacity, and then, rather than having the average advisor manage 700,000, they can manage between a million and a million 2, and your margin just went way up, and the number of people you have to pay went way down.

445

01:09:53.330 --> 01:09:54.000

Stephanie Bogan: Yeah.

446

01:09:54.660 --> 01:10:13.590

Robert Hansen, CFP®: Yeah, I always say that if I got paid the same. But I had a job that was 5 HA week and post meeting work or 40 HA week. Client meetings. I literally couldn't do the 5 HA week of post meeting work. It's just impossible for me. So yeah, you just got a right person in the right seat. Traction all that kind of stuff.

447

01:10:16.430 --> 01:10:17.560

Robert Hansen, CFP®: So

448

01:10:18.040 --> 01:10:23.069

Robert Hansen, CFP®: for our surges, I did want to share our

449

01:10:23.400 --> 01:10:24.770

Robert Hansen, CFP®: calendar.

450

01:10:25.430 --> 01:10:27.690

Robert Hansen, CFP®: Make sure I'm sharing the right one.

451

01:10:28.060 --> 01:10:50.619

Robert Hansen, CFP®: because I think it's important to kind of show how much our process has changed changed significantly over the last 3, 4 years of us doing this? So real quick in this section. What we're telling prospects as they're coming on board is we're trying to get you as quickly as possible into our annual pulse. That annual per pulse is kicking off the year with

452

01:10:50.620 --> 01:11:05.359

Robert Hansen, CFP®: goal planning. What is gonna come up this year? What goals can help keep me accountable for anything outside of that, that we need to be aware of any big changes that we should kind of earmark. So just a major check in to kick off the year.

453

01:11:05.360 --> 01:11:25.359

Robert Hansen, CFP®: And then if they're doing tax prep with us tax prep. And planning is a huge part of what we do for physicians. So it's not really a meeting surge. It's a surge for our I guess. Planning team where they're really involved in tax returns for 6 weeks. At that time.

454

01:11:25.360 --> 01:11:42.070

Stephanie Bogan: Yeah. So so this is when we talk about value adds right? And annualizing the service



calendar, like, what are we doing in January or March. Again, you have other things, client experience, etc. This is a really good example. There is value being delivered

455

01:11:42.540 --> 01:12:05.809

Stephanie Bogan: outside of meetings. It's focused and concentrated. Aka surging. But it's topical so that schedule could change. We have a lot of clients who do like a 3 year cycle like, hey in Jan, you know. q. 1 February. It's gonna be this special. And then next year it'll be right, something else. And so you can. You can, especially if you have smaller client segments.

456

01:12:06.820 --> 01:12:18.400

Stephanie Bogan: I don't like having multiple cycles across multiple segments. It's more to manage. But if you put those smaller tiers on a 3 or a 5 year cycle. You can cover all the basics

457

01:12:19.300 --> 01:12:31.821

Stephanie Bogan: profitably and in all fairness they don't need to review all of those things every single year. So it's just a way to think about how to focus on parts of the planning process or specialized value

458

01:12:32.230 --> 01:12:40.989

Stephanie Bogan: outside of meetings. To Robbie's point it might be that you shoot a Limboodian. Send it off. It could be a letter with an update, right? But it's

459

01:12:41.020 --> 01:12:51.219

Stephanie Bogan: work that's being done in a surge as part of the offering the service model. It doesn't have to all be you in a meeting, is the takeaway. There.

460

01:12:51.730 --> 01:12:52.330

Robert Hansen, CFP®: Yup.

461

01:12:52.470 --> 01:13:00.880

Robert Hansen, CFP®: yeah, Stephanie, you're absolutely correct on it, because it's the the more efficient we get with this, and the more clients are bought into it

462

01:13:00.960 --> 01:13:15.339

Robert Hansen, CFP®: at all. Other aspects of planning can easily happen through email, a phone call or video. It's just so easy to trickle them into a conversation we're already having or handle them outside of it. So it really eliminates a lot of those meetings between surges.

463

01:13:16.670 --> 01:13:32.419

Robert Hansen, CFP®: And yeah, we do have our 2 main surges, mid year tax planning and late year financial independence. And then we do a big company benefit review with everyone during their open enrollment later in the year. But again, that's a planning surge, less of a meeting surge. So

464

01:13:33.060 --> 01:13:36.580

Robert Hansen, CFP®: our way of laying this out was



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01:13:36.950 --> 01:13:39.199

Robert Hansen, CFP®: really trying to make sure

466

01:13:39.490 --> 01:13:59.777

Robert Hansen, CFP®: it's just again from doing this for the last few years. We're hitting the topics when we need to. We're really making sure that these parts of the planning that is so important in our opinion, for physicians is happening every single year at certain times, and we never miss it, so we can again easily pivot and jump in on other stuff when we need to.

467

01:14:00.410 --> 01:14:12.209

Robert Hansen, CFP®: Some of the things we've learned is help so much to completely block out the week before the week after, and the week right in the middle of all surges to

468

01:14:12.380 --> 01:14:15.100

Robert Hansen, CFP®: get everybody on the same page this 1st week.

469

01:14:15.240 --> 01:14:17.830

Robert Hansen, CFP®: Kind of relax a little bit, get ready for it.

470

01:14:18.040 --> 01:14:26.569

Robert Hansen, CFP®: Really try to catch up, breathe, take a minute, and then really try to make sure all your follow ups are done, and you can walk away from the search.

471

01:14:26.740 --> 01:14:41.265

Robert Hansen, CFP®: So it's helped us a lot. We are doing. We have 6 slots on Tuesdays and Thursdays, and 5 on Wednesdays. We give ourselves one evening a week. Well, besides Monday Fridays that we're able to relax a little bit.

472

01:14:42.020 --> 01:14:51.210

Robert Hansen, CFP®: and yeah, it's it's 1 of those over the last few years, I mean, last year this whole calendar was pretty green we just search the entire time just because of

473

01:14:51.220 --> 01:14:55.300

Robert Hansen, CFP®: growth, things going on not being efficient. Starting

474

01:14:55.390 --> 01:15:11.479

Robert Hansen, CFP®: a lot of it was the scheduling and the prep. I can't emphasize enough the process if you drop the ball on the 1st 2 in any way leads to so much more follow up post meeting work that it can extend the search significantly, or cause people to get frustrated.

475

01:15:11.510 --> 01:15:12.520

Robert Hansen, CFP®: So

476



01:15:12.710 --> 01:15:38.070

Robert Hansen, CFP®: we really kind of switch things up to make sure the prep is all done well in advance. So that way we can focus and just knock these out as we go. One of the things, too, is like a couple of years ago when we were doing it. We're like, we're getting the hang of this. We're doing really well until I spoke to Adam, and he mentioned that they are doing a goal planning meeting at the beginning of the year. John and Adam are, and completely change the way we're doing things. It was just

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01:15:38.530 --> 01:15:45.379

Robert Hansen, CFP®: so simple. But the greatest idea I've heard in a while and totally changed our business to really kick off the year, not just

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01:15:45.470 --> 01:15:49.910

Robert Hansen, CFP®: for us, but it the clients. This is their favorite meeting, from what we've seen

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01:15:51.150 --> 01:15:51.980

Robert Hansen, CFP®: so.

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01:15:52.450 --> 01:16:03.429

Stephanie Bogan: Very cool. And just to add, if you think about annualizing the service calendar. So that's where Robbie and Chris are really kind of at that level, too, where they're pulling things out of meetings

481

01:16:03.520 --> 01:16:15.170

Stephanie Bogan: and quote the financial planning department. Been in this case, right? Is going through all the client files. So you could imagine across different segments. If you look at this very nice color coded calendar

482

01:16:15.300 --> 01:16:36.637

Stephanie Bogan: that you could literally break it down by month, hey? The because, you know, the question is, what does a planning person? I am a huge advocate of having someone in the planning role that isn't an advisor from a client facing perspective or a rainmaking perspective, because those are the 2 jobs that are revenue sustaining and revenue built like we could have a whole conversation about that from a staffing perspective.

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01:16:37.100 --> 01:17:00.070

Stephanie Bogan: the question is, Well, what does that person do outside of meetings? So they're really busy for 8 or 10 weeks. And then what? And the answer is, they're literally doing all the planning work across the client segments in those batches. Hey? We're gonna look at everybody's insurance in February, and like an email goes out, hey, we did. XY or Z. You're all good. Click the link. If you want to talk so you really can get to a point

484

01:17:00.070 --> 01:17:10.389

Stephanie Bogan: where meetings are a hey, we just need to sit across from you and right build the relationship because we've done all the work on a systematic schedule over the course of the year.

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01:17:10.390 --> 01:17:22.880

Stephanie Bogan: That's that 3rd tier of the wedding cake where you can literally map it out on a cycle, and the planning happens, and the the advisor is just there to sit across from the client and be a face

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01:17:22.890 --> 01:17:32.140

Stephanie Bogan: and a relationship to represent all of the work that's happening behind. And that's where you get optimized teams going back to leveraging capacity.

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01:17:32.580 --> 01:17:41.999

Stephanie Bogan: So it's just really cool to see you guys moving from where you started into that second tier. And then, ultimately, right, you'll just nail that process.

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01:17:43.730 --> 01:17:56.570

Liana Poodiack: I have a question for either of you guys or both. In regards to. So 2 surges. Are you surging all clients twice a year or

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01:17:57.050 --> 01:18:05.820

Liana Poodiack: through your segments. Do you have? Do you surge like your Ab group twice a year? But your CD group? They're only getting one surge.

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01:18:06.310 --> 01:18:11.079

Liana Poodiack: Do you guys differentiate between your client segments? Yeah.

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01:18:11.500 --> 01:18:24.420

Robert Hansen, CFP®: Great question. We have about a little over 200 households that we work with. But 125 of them are really in the search process. So I'd say 125 are kind of in all of well.

492

01:18:24.490 --> 01:18:47.249

Robert Hansen, CFP®: at least these 2 main surges. There are about 45 of them. We're estimating that really, they don't need that early year goal planning kickoff. But we do have those C level clients, smaller clients, and the traditional. We manage a few few 1 million dollars of their money, and they don't want to talk about anything planning. They just want us to manage their money. So we do have some of those still. But

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01:18:47.250 --> 01:19:06.297

Robert Hansen, CFP®: yeah, it's we're inviting all 125 to each of these surges and shooting for hopefully, about 80% sign up for meetings. We'd love to get to only 10% sign up. But we're still delivering all the planning for everybody. And that way, we don't have to meet as much. But yeah, right now, just

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01:19:06.710 --> 01:19:14.646

Robert Hansen, CFP®: really trying to make sure people are involved in the process. The clients are part of the surges. They're getting all of that value delivered to them.

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01:19:15.390 --> 01:19:42.876

Robert Hansen, CFP®: and yeah, as we grow because we're adding about 40, 45 new clients a year on

average. That's where this 6 week window. It is breaking up a little bit, too. We have 6 meetings lots a day on my schedule, but Trey also has a schedule. Who's stepping into the lead advisor role. There could be at some point 6 meetings for Trey and 6 meetings for me in the same day, because we do have our 100 clients that we're servicing. So

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01:19:43.200 --> 01:19:51.879

Stephanie Bogan: And that's where you have to start looking at. Okay, who is it, Kate? Or Ben like who's preparing? And then right, you have to make sure the search right? And that's where.

497

01:19:52.160 --> 01:20:12.130

Stephanie Bogan: Then you build on the back end of that. And and that's where cases where we might alternate surges like, okay, you're going to be March April right? And you're going to be April, May. And again, you're always just going to be running into how many meetings. Can you fit into your search periods? And then, if you have multiple advisors, what kind of workload does that create for the planning group?

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01:20:12.920 --> 01:20:14.129

Stephanie Bogan: Yeah, cool.

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01:20:14.130 --> 01:20:20.330

John Bohnsack, CFP®: Yeah for our CD clients. We meet with them once a once a year, and they're predetermined if they're spring or the fall.

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01:20:20.370 --> 01:20:23.530

John Bohnsack, CFP®: But a vast majority of them are twice are.

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01:20:23.930 --> 01:20:26.180

John Bohnsack, CFP®: or that twice a year level.

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01:20:26.180 --> 01:20:27.117

Liana Poodiack: Okay. Thank you.

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01:20:27.430 --> 01:20:36.490

Stephanie Bogan: Are the once a years for either or both of you. Is it just? Whatever do they get, whatever meeting they happen to attend, or are you offering them one of the meetings?

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01:20:36.690 --> 01:20:40.280

Stephanie Bogan: Because that's sort of the most covers most of the bases. Yeah.

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01:20:40.280 --> 01:20:45.470

John Bohnsack, CFP®: Yeah, we we've assigned them. If they're a fall or spring meeting, they don't. They have no clue. But

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01:20:45.920 --> 01:20:51.249



John Bohnsack, CFP®: some clients are from these summer or spring meetings. And we just offer that one time. Yeah, yeah.

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01:20:51.250 --> 01:21:16.800

Robert Hansen, CFP®: Almost all of our once a mere once a year. Clients are either. They have so much money and they're older that they just want to check in on their distributions the investments. Maybe some tax planning or their crd client that it's we probably won't get into that level of tax planning, but we'll just check in. See how they're feeling. See how things are going on. So it's a pretty similar conversation across the board for all of them whenever they schedule it.

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01:21:16.950 --> 01:21:17.540

Stephanie Bogan: Okay.

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01:21:18.590 --> 01:21:20.149

Stephanie Bogan: good, very helpful.

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01:21:21.250 --> 01:21:22.830

Stephanie Bogan: Other questions.

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01:21:24.480 --> 01:21:29.009

Stephanie Bogan: Got a couple of minutes. Add anything anything you want to add from your perspective.

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01:21:29.300 --> 01:21:32.640

Stephanie Bogan: how does this kind of marry against the experience you guys have had.

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01:21:34.200 --> 01:21:44.930

Ed Woehlcke: Yeah, I I just think, I mean, these guys are just different levels of efficiency than us. So it's, I've taken a bunch of notes to go back and review. And

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01:21:44.990 --> 01:21:48.007

Ed Woehlcke: it's just perfecting the system. So

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01:21:48.790 --> 01:22:01.670

Ed Woehlcke: and then optimizing those income engines. So it all ties in, though. Kind of what you've talked about before, just right sizing and delivering the right service model. So it's all like, it's just that next step there. So.

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01:22:02.540 --> 01:22:03.970

Ed Woehlcke: But yeah, it's it's

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01:22:04.350 --> 01:22:08.720

Ed Woehlcke: we're headed there. We just gotta get as good as these guys over time.



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01:22:09.160 --> 01:22:17.509

Stephanie Bogan: Yeah. And I think, John and Robbie feel free to correct me. But I don't think anyone launches at we nailed it. It.

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01:22:17.510 --> 01:22:17.920

Ed Woehlcke: Yeah.

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01:22:17.920 --> 01:22:22.149

Stephanie Bogan: And I say this, and I don't ever want to scare people off. But I would say.

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01:22:22.630 --> 01:22:39.199

Stephanie Bogan: like Year one, you're just like you're getting through it. And you're figuring out the big ticket items like, Oh, that follow up thing is an actual problem. Let's let's pay attention to the bucketing strategy. It will save us later. You know. I think by year 2, you've heard Robbie talk a lot about this

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01:22:39.200 --> 01:22:53.490

Stephanie Bogan: and job like, Oh, we're gonna put a meeting in the middle. We're gonna you. You start to tweak it because you're like, you know what I this is what I can do, based on. I call it my level of training right? Like I could run 5 miles right now. I could not run 15

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01:22:53.490 --> 01:23:02.949

Stephanie Bogan: right? So level of training like, I'm not gonna do 6 meetings a day, right, Robbie, like he's got that part down so. But notice they've got those tweaks. So

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01:23:03.080 --> 01:23:12.812

Stephanie Bogan: the debriefs are really important. And then looking at each cycle and getting really clear about like, what's that next level of cool that we could make it?

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01:23:13.510 --> 01:23:16.840

Stephanie Bogan: it's just something to think about. So yeah, we'll talk about that when we do. Our

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01:23:16.930 --> 01:23:30.800

Stephanie Bogan: our check-ins is like, let's just talk about how to just turn it up a notch, because the I want you all to think of this is like, you're rowing a boat right? You're gonna get to the island of growth. It's going to happen. Just good good service and good time

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01:23:30.810 --> 01:23:35.030

Stephanie Bogan: we're we're trying to put right a really fast motor on the boat

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01:23:35.350 --> 01:23:46.300

Stephanie Bogan: while we're rowing the boat. It's real work. But there's all these barnacles on the boat, and barnacles are. I'm still checking my email 17 times. I'm not using model schedule. I'm kind of doing surges.



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01:23:46.350 --> 01:24:16.159

Stephanie Bogan: We've we've done some work on, like all of those things. If we can just chip them off one by one and very much to the point like, lay the tracks and get started. You're not going to perfect surge out of the gate again, Leanna and Travis have a specific timing. But like, where's the trigger? Where you say, hey, you know what this is worth investing in? Because it's the best way to gain back time outside of personal productivity, which notice was the 3rd leg on that capacity stool?

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01:24:16.537 --> 01:24:29.889

Stephanie Bogan: Because it's very real. But advisor capacity is both at the personal level, like, how do you spend your time each day, but at the client service bottle level. That's the big lever you have to pull so that we can grow

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01:24:29.990 --> 01:24:52.659

Stephanie Bogan: without a lot of complexity, because all those moving parts compound as you grow, it gets more stressful. And you got to hire more bodies. And we're not putting everything through the lens of that? Have we optimized for capacity across all these variables? And that's why you read about margins going down and stress going up when firms grow because we're compounding the barnacles.

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01:24:53.120 --> 01:25:06.530

Stephanie Bogan: So our goal this year for each of you is to make sure that you're at least implementing at the value level model meetings, some version of surges, or you have a plan to do it that makes sense.

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01:25:06.600 --> 01:25:11.780

Stephanie Bogan: and that Mvp. Service model right? What's on the agenda for the meetings

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01:25:12.150 --> 01:25:18.539

Stephanie Bogan: in the basic form. And then we'll add layers 2 and 3 when we've kind of got the process down

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01:25:18.670 --> 01:25:25.840

Stephanie Bogan: the way that Robbie has like. Okay, now, we can have the financial planning greetax planning like, was that hard Robbie? Or they were like, Yeah, we know how to do this. Now.

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01:25:26.470 --> 01:25:37.110

Robert Hansen, CFP®: Yeah. It's once you do it a few times. It just really I don't know, no matter the what. The 1st time you do it. It is just not gonna go. Well, we stumble our way. Yeah.

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01:25:37.110 --> 01:25:38.050

Stephanie Bogan: Gonna hurt.

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01:25:38.050 --> 01:25:38.450

Robert Hansen, CFP®: Yeah.

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01:25:38.450 --> 01:25:42.139



Stephanie Bogan: Like walking out of the gym 2 days later, where you're like. Ow!

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01:25:42.140 --> 01:25:42.490

Robert Hansen, CFP®: Yeah.

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01:25:42.490 --> 01:25:43.110

Stephanie Bogan: That.

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01:25:43.280 --> 01:25:43.800

Allison Foulk: Yeah, my.

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01:25:43.800 --> 01:25:44.879

Robert Hansen, CFP®: It's all. Trans.

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01:25:45.030 --> 01:25:53.459

Allison Foulk: Robbie does have a few other things that I think would be helpful to share, especially in terms of the meeting agenda and the process around that if you want to

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01:25:53.866 --> 01:25:55.330

Allison Foulk: share those. And yeah.

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01:25:55.900 --> 01:26:15.470

Robert Hansen, CFP®: Yeah, and total transparency on it, too. I mean, last year's tax planning surge. I only got to because we didn't have the team set up in a way with somebody managing the follow ups or leveraging. So the right AI and software that we only did about 50% of the follow ups, and it caused a ton of issues. So it is. Just

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01:26:15.960 --> 01:26:22.619

Robert Hansen, CFP®: try it, stumble your way through it, apologize when you need to, and do it better next time. Yeah.

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01:26:23.100 --> 01:26:29.570

Robert Hansen, CFP®: But for some of the other tools I did want to mention a few of these. They've been super helpful for us.

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01:26:29.700 --> 01:26:31.110

Robert Hansen, CFP®: so we

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01:26:31.930 --> 01:26:38.180

Robert Hansen, CFP®: as we're preparing for a meeting we use. I guess I'll show the tech stack

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01:26:38.570 --> 01:26:59.619

Robert Hansen, CFP®: a few different software tools that just really help us. They are real relevant to



salesforce accelerate as our Crm. But you can still use them as long as you're using stuff like Google Drive. There's other solutions out there, but a good example like the post meeting, wrap up of that 5 to 10 min.

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01:26:59.620 --> 01:27:09.209

Robert Hansen, CFP®: It was a part of our process that after every search meeting for 5 to 10 min, we met with the person doing the follow up kind of summarized everything to get it done.

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01:27:09.300 --> 01:27:36.589

Robert Hansen, CFP®: That was a total fail for us. It just did not work. So it's 1 of those we started using fireflies. We reiterate all next steps. What we agreed on in a summary to the client, while the clients still on the meeting, and our assistant, Trinity and Erin on the team. They'll do the post meeting work and wrap up and send it. And if there's a problem, it's usually because I didn't put it in the summary, and it teaches me to be better at what I'm doing.

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01:27:36.590 --> 01:27:47.020

Robert Hansen, CFP®: but I don't have time or capacity to really sit there and talk through it all with them one by one, so leveraging some of those tools. Especially the the pre meeting work.

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01:27:47.629 --> 01:27:49.629

Robert Hansen, CFP®: Because we're trying to do

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01:27:49.840 --> 01:28:06.000

Robert Hansen, CFP®: this prep in August, and we might not meet with that client until September, late September, early October. Loom is a huge part of what we do, because, as we're building out, we'll actually create the meeting notes for everybody for that surge.

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01:28:06.050 --> 01:28:26.710

Robert Hansen, CFP®: We'll prep all of them. Certain people on the team have different areas. They gotta prep. And then ben on the team who's leading the planning doesn't have to worry about some of the other stuff or just data entry. He can get in there right into the planning and put together a loom video of 5 to 10 min summary of here's what we're recommending and why. And it's huge for us, because

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01:28:26.910 --> 01:28:50.569

Robert Hansen, CFP®: one, it summarizes everything that we can watch way ahead of time and push back with thoughts, feedback ideas, whatever it is. But 2 is we're getting ready for the meeting. When you have a hundred 100 different surge meetings in 6 weeks, and you have to watch 15 to 20 videos each week. It really helps to have those there that you can circle back to and refresh what's going on? Why did we

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01:28:50.620 --> 01:29:06.119

Robert Hansen, CFP®: make this recommendation? Put this plan together in this way, and so on. And it's been extremely helpful. A year or 2 later, when we can look back at, here's the tax plan from last year's loom video. And the year before that zoom video. So just huge for us as a company.

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01:29:06.120 --> 01:29:15.270

Stephanie Bogan: Yeah, you, you mentioned that earlier today. And I just thought it was a really compelling point, the use of loom a couple of different places right? Because it goes out to clients

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01:29:15.470 --> 01:29:21.949

Stephanie Bogan: with the prep. So Robbie mentioned, they switch scheduling and prep, they do the prep. First, st

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01:29:21.980 --> 01:29:29.869

Stephanie Bogan: Ben records the loom videos, the plan. The guys get them. But they also go to the clients. And so like.

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01:29:29.900 --> 01:29:40.309

Stephanie Bogan: if a client doesn't come to a meeting, they're like, hey, check the box. But when you think about? And, Robbie, I wanted to ask the follow up question, how long are you spending, prepping for meetings.

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01:29:40.430 --> 01:29:44.460

Stephanie Bogan: and then is watching the last video part of that prep for you.

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01:29:44.820 --> 01:29:55.189

Robert Hansen, CFP®: So I just watch the videos and give them feedback if I have any. And then I'm jumping on 15 min before re-watching the video and getting ready to talk to them.

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01:29:55.190 --> 01:29:56.410

Stephanie Bogan: 1520 min, Max.

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01:29:56.410 --> 01:30:05.110

Liana Poodiack: So you said the client gets the review or gets the loom video ahead of the meeting, or you're just using it. Robbie.

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01:30:05.260 --> 01:30:22.039

Robert Hansen, CFP®: We'd like to get to that point. But the loom videos are just internal unless they don't sign up for the surge, since we're only getting about 80% of people signing up for the surge. We'll take it for the people that don't. We'll take Ben's loom video and turn that 10 min

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01:30:22.040 --> 01:30:36.389

Robert Hansen, CFP®: advisor facing Video into a 5 min client facing video and just send it to them. Of, Hey, we missed you this surge. We would love to see you, but we know life's busy. Here's some things we've been checking in on staying up to date with, and you're good to go in this way.

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01:30:36.760 --> 01:30:39.400

Robert Hansen, CFP®: so that's the time we send them a little video.

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01:30:39.800 --> 01:30:41.399  
Stephanie Bogan: Good point of clarification.

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01:30:41.670 --> 01:30:45.530  
Stephanie Bogan: Yeah, the cool thing about that is, if they don't schedule

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01:30:45.810 --> 01:31:00.340  
Stephanie Bogan: getting that summary to them is really E relatively easy, and it it still creates that touch point of we've done work for you. We're on top of it. We care like it checks all the boxes. So you get

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01:31:00.500 --> 01:31:08.400  
Stephanie Bogan: I, who knows scientifically, you get 2 thirds of the benefit without right actually having to do the meeting. Prep, which is why, Robby, you'll see

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01:31:08.430 --> 01:31:16.290  
Stephanie Bogan: as you get better and better at the cycle and layering in things like tax planning and specials. People will take you up on fewer and fewer meetings.

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01:31:16.360 --> 01:31:26.629  
Stephanie Bogan: And that's a good thing, because it says that financial planning has become a process in your practice, not an event. They're seeing and feeling it often enough

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01:31:26.910 --> 01:31:40.590  
Stephanie Bogan: that the meetings just become again meetings. And that's when you'll start to see those numbers again. They might stay engaged in terms of the number of meetings, but you'll find there's less and less substantive stuff to talk about in the meetings.

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01:31:40.920 --> 01:31:45.160  
Robert Hansen, CFP®: Yep, yeah. So meetings can really focus just on the relationship. Yeah.

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01:31:45.300 --> 01:31:45.900  
Robert Hansen, CFP®: And that's.

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01:31:45.900 --> 01:32:00.760  
Stephanie Bogan: For things like the goal planning right? And are we on track? And what kind of mid year like that? That's where you really start to add right or doing the business planning. You start to add much deeper value than a typical planner can, because they just don't have the capacity to keep up.

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01:32:00.890 --> 01:32:01.640  
Stephanie Bogan: Yep.

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01:32:01.640 --> 01:32:20.929  
Robert Hansen, CFP®: And we didn't at all try to send the Loom videos for people that didn't schedule until 2 or 3 surges later, because it was really just let's us get used to it. But now that we're sending them



for the people that don't schedule, it has eliminated all of the hey? I didn't schedule in June and July. It's now July 29.th

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01:32:20.930 --> 01:32:34.000

Robert Hansen, CFP®: Can we meet? I really do think I need to talk tax planning. It eliminated all of those, because we already gave them a summary and recommendations. And if there was something that we couldn't give in the video, they know we'll get to it in the next search.

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01:32:35.630 --> 01:32:36.970

Robert Hansen, CFP®: But yeah, it's

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01:32:37.180 --> 01:32:43.570

Robert Hansen, CFP®: the biggest thing for us is making sure. Here's an example of my siblings, my sister and brother in law.

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01:32:44.400 --> 01:32:51.059

Robert Hansen, CFP®: it's really just making sure, when we have this level of planning like a mid year tax planning meeting, that

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01:32:51.600 --> 01:33:04.766

Robert Hansen, CFP®: there's a lot here. There's 4 or 5 pages of notes already. I don't want to have to think of. Well, did Ben think of this when going through the tax planning recommendation? That's what the loom video is really helpful on

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01:33:05.080 --> 01:33:28.479

Robert Hansen, CFP®: But making sure I can just be as efficient as possible is huge, and that I'm not involved in it is huge. So it really tracks everything. There's a lot of data entry from these notes into our Crm, they do get put in different areas if they're relevant but one of the other things. I'm just gonna throw this out. There is if anyone uses Google drive definitely check out notebook. Lm.

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01:33:28.670 --> 01:33:33.250

Robert Hansen, CFP®: so I love this thing, but it's a new AI tool. It's in Beta right now.

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01:33:33.360 --> 01:33:53.250

Robert Hansen, CFP®: but we have all of our client notes and the dictation from fireflies. Everything going into one folder. And we, as we're prepping for meetings, we start a notebook for that client, and you can. It's just amazing what you can do in here of it pulls in a timeline of everything going on

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01:33:53.250 --> 01:34:12.879

Robert Hansen, CFP®: since you started working with them. Since the notes have started, it has information on all the people. You can ask it anything. Example I gave earlier. We're in a meeting, and the client said they just went to Europe for vacation, and I just typed in vacation into here, really quick, and it came back with some

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01:34:12.910 --> 01:34:24.149

Robert Hansen, CFP®: for them. It was they wanted to go to London to visit their cousin that lives there. So within a few seconds I told them, oh, my gosh! What your cousin lives there right in London is that where you went? And they were just blown away that I remember.

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01:34:24.150 --> 01:34:25.120

Stephanie Bogan: That's awesome.

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01:34:25.120 --> 01:34:31.170

Robert Hansen, CFP®: So it's like cheating your way into some of the conversations. And the reason I love it like a lot of AI. It's great.

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01:34:31.190 --> 01:34:38.749

Robert Hansen, CFP®: but it's got to get better. This one I love that as it brings in stuff, you can click on this, and it'll show you exactly where it came from in the note

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01:34:38.780 --> 01:34:41.250

Robert Hansen, CFP®: to double check. Is that accurate or not?

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01:34:42.550 --> 01:34:43.380

Stephanie Bogan: That's cool.

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01:34:43.810 --> 01:34:49.819

Robert Hansen, CFP®: So huge fan. But yeah, it's it's for us. We've always had a struggle with the post meeting work.

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01:34:50.040 --> 01:35:06.370

Robert Hansen, CFP®: getting the premium work not done in enough time that it caused the surge to be more stressful because we're trying to do that during the surge and with growth during surges. But because we're all getting the. We're getting the right people in the right seats and really trying to

600

01:35:06.370 --> 01:35:23.180

Robert Hansen, CFP®: kind of compartmentalize a bit more. We're able to now grow more in surges. Because again, since I'm out of all of this, I have learned more call availability and discovery process availability on my calendar. Still, during those 6 meetings. Tuesday, Wednesday, Thursdays.

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01:35:23.810 --> 01:35:24.720

Robert Hansen, CFP®: So.

602

01:35:25.570 --> 01:35:26.520

Stephanie Bogan: Pretty, efficient.

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01:35:28.370 --> 01:35:38.639

Robert Hansen, CFP®: It's feels like it the way I'm sounding it saying it. But say, it's a lot of times I'm like, Oh, man, we survived. It's just one step at a time.



604

01:35:38.960 --> 01:35:50.389

Stephanie Bogan: That's the other thing, like, I tell people like when you search, that's pretty much all you should be doing like. That's that's it, truly, and resting and getting good nights. It's like all that corny stuff

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01:35:50.680 --> 01:35:56.560

Stephanie Bogan: actually matters because you are on like on

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01:35:56.600 --> 01:36:09.540

Stephanie Bogan: all day, which again, is why Mondays and Fridays off is really helpful. Those breaks in the middle. Because it's a lot of actual energy to bring to bear consistently.

607

01:36:09.892 --> 01:36:34.380

Stephanie Bogan: And it's it's your super bowl time, right? So it's like you are playing in the big game consistently for weeks. And that's kind of like the playoffs. So it is the same thing like you really are an athlete in right? John is like, Okay, you know, like, my kids know, this is probably not the 6 weeks. I'm going to be leaving early on a Tuesday, just because but right. But you acclimate, and it gives you a lot of freedom the rest of the time. So

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01:36:34.920 --> 01:36:42.119

Stephanie Bogan: that's great. You guys have any parting questions for John or Robbie around surges, or how they've implemented them with their teams.

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01:36:45.340 --> 01:36:48.739

Stephanie Bogan: feels like we covered the bases there. Good! I appreciate that, you guys.

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01:36:48.740 --> 01:36:49.240

Liana Poodiack: For sure.

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01:36:49.240 --> 01:36:52.120

Stephanie Bogan: Really appreciate. Yeah, yeah, sure, pick your.

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01:36:52.120 --> 01:36:52.930

John Bohnsack, CFP®: To do it.

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01:36:53.160 --> 01:36:53.840

John Bohnsack, CFP®: Yeah.

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01:36:55.350 --> 01:37:01.359

Stephanie Bogan: Well, and I think the the takeaway is the key to search. Successful surging is starting

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01:37:01.690 --> 01:37:15.319



Stephanie Bogan: right and then stepping it up, each surge just becomes a natural these were the lessons and takeaways. I would say, you guys, the 1st 2, my experience, the 1st one. There's a lot of learning.

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01:37:15.550 --> 01:37:17.800

Stephanie Bogan: I would say the 1st 2

617

01:37:17.870 --> 01:37:25.260

Stephanie Bogan: good, you know, by the 3rd one you have, like, okay, we know how to do this. And by around the 4th one. You're like, okay.

618

01:37:25.390 --> 01:37:46.469

Stephanie Bogan: then I think you kind of shift into like, all right, we're what can we do with this? How can we make it faster, better, smarter, stronger, like it. Really, almost. I don't want to say a game, but it does kind of almost be like, what can you know? What rep. Can I hit at the gym today like, can I do 5 meetings a day? Can I get it down to this? Can I go from 30 min to 20 min, because

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01:37:46.490 --> 01:38:09.809

Stephanie Bogan: you're honing your craft and you're trying to do it with a level of operational mastery that is largely unheard of in right professional services. This kind of discipline and rigor is really found in athletes and top performers. That's the attitude we want to bring to right. How do we optimize our client capacity with meeting searches.

620

01:38:10.421 --> 01:38:15.380

Stephanie Bogan: You're going for the gold just to keep it in theme just to keep it in theme.

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01:38:16.890 --> 01:38:23.329

Stephanie Bogan: Alison, we should have had, like an Olympic podium at the end on video, it would have been amazing. Right there. Just insert there you go.

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01:38:23.350 --> 01:38:26.040

Allison Foulk: A surgeon Olympic podium that would have been.

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01:38:26.040 --> 01:38:26.470

Stephanie Bogan: Great.

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01:38:26.470 --> 01:38:27.170

Allison Foulk: That's right.

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01:38:27.170 --> 01:38:28.559

Stephanie Bogan: Star gold gold medals.

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01:38:29.110 --> 01:38:40.075

Stephanie Bogan: Alright, guys, thank you very much. If you guys, we as always will record this. So if you



wanna come back to? Not just the lesson. But this specific office hours that will be available to you.

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01:38:40.410 --> 01:38:49.699

Stephanie Bogan: And if you want to pull it up with the team and go back and look at notes. And if you guys have questions, let me know you will be getting your august checking emails again. I apologize.

628

01:38:50.279 --> 01:39:06.629

Stephanie Bogan: It was my intent to send them last week but I was trying not to die last week, and I'm better now, so I will get those out to you. With calls in the week of the 12th and the 19.th So be looking for those today, and tomorrow and we'll circle up on this and all other things limitless

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01:39:06.954 --> 01:39:15.960

Stephanie Bogan: so we can put a plan in place for the balance of the year, because we've got some some structure we're going to be sharing with you. Alright, guys. Anything else before we go.

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01:39:16.470 --> 01:39:18.510

Stephanie Bogan: Alison? Did we cover all the bases.

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01:39:18.890 --> 01:39:21.180

Allison Foulk: Yep, I think we got it looking forward.

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01:39:21.180 --> 01:39:26.939

Stephanie Bogan: John, thank you so much for your time. Really appreciate you sharing your experiences, leaders as always.

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01:39:26.970 --> 01:39:30.773

Stephanie Bogan: I know it's August. I know it's summer. Thanks for coming today.

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01:39:31.090 --> 01:39:31.480

Liana Poodiack: Video.

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01:39:31.480 --> 01:39:36.170

Stephanie Bogan: With the kids back in school. Everyone will show up for meetings again. Alright, you guys, we'll talk to you.

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01:39:36.170 --> 01:39:37.449

John Bohnsack, CFP®: Thanks, Erin! Take care!

637

01:39:37.450 --> 01:39:38.350

Robert Hansen, CFP®: Everyone.



