

LIMITLESS Coaching Call Transcript

December 2nd, 2024

12.02 Leaders Practice Coaching Call (Program Wrap)
(Program Wrap)

88

00:10:19.710 --> 00:10:22.119

Stephanie Bogan: In fairly unofficial fashion

89

00:10:23.004 --> 00:10:48.600

Stephanie Bogan: our conversation today again. We're gonna cover this next year, Mark, Laura, I'll go over this with you and your one on one, because I want you as you're focusing on growth over the next couple of years, want you to be focused on this, which is, as we do, strategic planning year. One of leaders, as you all know, is very much about optimizing time, capacity and margins. We tend to grow anyway. Right, as you all have for the most part done.

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00:10:48.880 --> 00:10:58.609

Stephanie Bogan: Neil's gonna come we have a webinar on 12 5 with Michael and I. Neil was in our 1st couple of years of leaders after lifestyle

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00:10:58.976 --> 00:11:18.849

Stephanie Bogan: did some changes. Took it. I don't know. Year or 2 off Natalie, and now is like, Hey, I've decided to grow the firm to the next next level. So he's gonna come back and repeat it again. But he's gonna come. Talk about some of the changes in that session. But what we, what we sat down and talked through is Mark. If you remember that 3 year roadmap.

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00:11:18.850 --> 00:11:19.440

Mark Wade: Yep.

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00:11:19.720 --> 00:11:46.570

Stephanie Bogan: Or it's the same in lifestyle right year. One. Optimize time capacity margins 2 year 2 professionally is the practice set up for scale. This is really about 2 things positioning right? Who? Who are we working with? What you got clarity on this year next year is about setting up that positioning and people process and platform, right, all the leverage, so that we can do all the things you ultimately want to do less dependent on you, mark super applicable to you.

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00:11:47.023 --> 00:11:59.690

Stephanie Bogan: And so the idea is, I just wanted to kind of draw everyone's attention to the marketing conversations. We intentionally right, because we can only do so much at a time. Have you focus on different things

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00:11:59.700 --> 00:12:05.789

Stephanie Bogan: each quarter and each year. So as we look at planning for 2025, which most of you are doing.

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00:12:06.130 --> 00:12:11.779

Stephanie Bogan: The idea was to do a quick reflect on strategic planning as it relates to growth.

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00:12:12.370 --> 00:12:32.910

Stephanie Bogan: so good questions, to ask ourselves, what are the top? 3 drivers of net, new assets and clients this year like, is it referrals, is it? You know, contributions? Is it? You know the marketing funnel or the leads, and like what's actually working is doubling down on that is usually our surefire way to drive more intentional growth more efficiently

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00:12:33.475 --> 00:12:38.359

Stephanie Bogan: you know. And then questions like, was it intentional or unintentional? Right? Did it happen?

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00:12:39.143 --> 00:12:51.130

Stephanie Bogan: As you know, right building out right sizing the client base defining service models, putting model meetings. And those things in place really start to deliver deeper, deeper value. We see people grow

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00:12:51.510 --> 00:12:59.720

Stephanie Bogan: even when quote growth isn't the focus next year. The shift is to start paying attention to these things more specifically.

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00:13:00.340 --> 00:13:04.819

Stephanie Bogan: how are we tracking referrals? So again, in a scalable firm.

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00:13:05.090 --> 00:13:33.399

Stephanie Bogan: Mark's not just remembering this stuff in his head. It's hey. This is how we generate referrals. So we just did our lifestyle call this morning and had 3 lifestyle advisors share their success stories. All 3 of them grew double digits without ex. We'll call extracurricular marketing. It was service models, right sizing right? Adding real value consistently to clients to drive the things that we know grow us share wallet referrals, center of influence referrals.

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00:13:33.713 --> 00:13:42.520

Stephanie Bogan: So the idea. This will be particular for you, Laura, just because Cos and referrals are a big part of what you're doing, Mark, we're gonna wanna make sure

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00:13:42.830 --> 00:13:46.469

Stephanie Bogan: a lot of this will happen on the lead Gen and the funnel side

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00:13:46.500 --> 00:13:51.280

Stephanie Bogan: on the client side and the referral side, we want to do that same level of data tracking.

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00:13:51.490 --> 00:13:57.340

Stephanie Bogan: So the same way. We can say legions are working right where they aren't or where it breaks down. We could be like, wait a minute.

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00:13:57.480 --> 00:14:11.829

Stephanie Bogan: Here's what we had with referrals. And we're gonna start looking at in very much the same way. What we focus on expand. So that's really the conversation is, I just wanted to make sure that everyone was really sort of sitting as we wrap up the year with a reflection on what drove growth this year.

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00:14:13.350 --> 00:14:20.810

Stephanie Bogan: and for some of you. It was intentional stuff, and for some of you it was right. Show up and do the things we talk about, and they tend to result in growth.

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00:14:21.195 --> 00:14:26.619

Stephanie Bogan: Were the intentional or unintentional right? Where can we move the needle based on what we do next year?

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00:14:28.120 --> 00:14:30.860

Stephanie Bogan: Total share of wallet for client tracking.

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00:14:31.200 --> 00:14:42.470

Stephanie Bogan: You may or may not have this data depending on the systems that you use. Right? If you're using something that's interactive. And you can see their other data. But the idea is ultimately like, is that a data point we want to be tracking

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00:14:43.038 --> 00:15:03.120

Stephanie Bogan: outside of referrals. Where's new business coming from right. So Mark, we wanna look at growth. But in your case, we really because you're investing so heavily in right scalable legion, we want to look at your organic and your less organic, if you will, your scalable digital strategies to see how they're performing. Relatively speaking.

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00:15:03.440 --> 00:15:19.309

Stephanie Bogan: there's only so much you can do on the personal side, right once you've loved on the clients and serve the clients and followed up like there is only so much you can do there. Which is why, if you have double digit growth goals, we ultimately want to get those other things in place mark which we're working on

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00:15:20.543 --> 00:15:30.590

Stephanie Bogan: the most important thing is, we want to be able to answer these questions as we think about next year. We want the system in place to not be sitting here wondering

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00:15:30.720 --> 00:15:45.390

Stephanie Bogan: where to be like. Oh, wait, let me go get it in 5 different places, so that at the



beginning, middle, and end of the year. We know exactly where we are on new business growth, because it's 1 of the key data points we really want to be aware of and pay attention to. Because what we focus on expands

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00:15:45.500 --> 00:15:52.729

Stephanie Bogan: this year, we've been focusing on reclaiming time, capacity and margins. So we can invest in these other things.

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00:15:53.557 --> 00:16:18.650

Stephanie Bogan: Do your advisors for those of you with other advisors? Do your advisors have the marketing and sales resources. They need to drive organic growth at that level. Right? So if you're Danny or Chase or Chris, right? Are the people bringing on advisors? Chris Hansen? That's where we really start to look in year 2 at professionalism scale. Isn't just you right? It's how can I replicate that same success, irrespective of the advisors sitting in the seat?

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00:16:18.940 --> 00:16:23.769

Stephanie Bogan: Mark for you that Cro or chief retirement officer Brand, differentiator.

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00:16:24.020 --> 00:16:28.800

Stephanie Bogan: right? The person in the process sit in that seat, whether it's you or not understood.

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00:16:28.800 --> 00:16:31.420

Natalie Bergsma: Drink the bigger stuff. It's very tiny.

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00:16:31.420 --> 00:16:34.565

Stephanie Bogan: Oh, sorry! Here, let me. I've also got it on

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00:16:38.170 --> 00:16:39.380

Stephanie Bogan: see if we can.

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00:16:40.630 --> 00:16:41.360

Natalie Bergsma: Perfect.

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00:16:42.070 --> 00:16:43.949

Stephanie Bogan: Move that over a little bit for you guys.

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00:16:46.348 --> 00:17:05.450

Stephanie Bogan: Did your expected results align with your marketing spend? How much did we spend? Right, Mark, this is really important for you. What's the Roi? Right? You've got old efforts. But in particular new efforts. So we wanna make sure that right, you're getting right. We're tracking that and getting Roi on that over time. Which Greg's really good at doing.

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00:17:05.788 --> 00:17:15.649

Stephanie Bogan: What frustrated you this year from a growth or a lack of growth perspective, whatever



that is, is probably what we need to solve for next year, as we think about scaling up

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00:17:15.720 --> 00:17:22.960

Stephanie Bogan: marketing. If it frustrated us at this level at the next level is either going to be a bigger bottleneck or a bigger barrier to step over.

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00:17:23.910 --> 00:17:41.989

Stephanie Bogan: So those are kind of just just very basic, but really important marketing and growth questions that we want to kind of just set in front of you as we think about this year all the optimization that we've done and the work next year about putting those systems and scale in place with

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00:17:41.990 --> 00:18:00.740

Stephanie Bogan: a real shift towards focus on positioning and getting those marketing foundations in place. And again, if we're doing bigger stuff, think that 3 year runway, podcast etc, right? You're gonna be working incrementally on that to get that fly will moving over time. But looking at this data on a consistent basis will be really important to those efforts.

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00:18:01.690 --> 00:18:08.490

Stephanie Bogan: It's also a good place to ask questions. Has the business vision or mission changed, Laura? It's totally applies to you.

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00:18:08.730 --> 00:18:26.510

Stephanie Bogan: Right, Mark. It has, and that you've sold 2 firms right now. This firm has a very new mission vision target client, Laura. Same thing for you. Just different scenario, just different way to get there? Which is, hey? Great! What's your timeline? What are your goals? What's the mission or vision? Right? Have fun

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00:18:26.570 --> 00:18:37.670

Stephanie Bogan: you and I talked about? Do we want to drive growth. Do we want to drive growth and then refer to people? Do we want to take those clients? Right? So it's just something for you to think about what you want to invest your time in for the next few years.

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00:18:37.998 --> 00:18:43.670

Stephanie Bogan: You should have all answered this question this year is your ideal client personas changing or staying the same

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00:18:44.090 --> 00:18:50.349

Stephanie Bogan: right looking at vision niche right sizing the client base. Laura, this might be a good time for you to go back

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00:18:50.420 --> 00:19:02.899

Stephanie Bogan: and do those exercises either in December or q, 1 with the group, because that will right now, with a smaller practice, you're gonna get to go through that again, and then think about where you want to spend your time growing. Going forward

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00:19:03.451 --> 00:19:09.999

Stephanie Bogan: revenue targets for next year will be part of obviously vision planning and the breakthrough course around mindset vision and time.

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00:19:10.581 --> 00:19:33.999

Stephanie Bogan: Mark what you'll notice, Laura, we're gonna do this in lifestyle as well. A lot more structure. In particular, around tracking. We want to know how you're doing. And we want you to know how you're doing relative to the goal. So we're gonna set those at the beginning of the year. You're going to share them with us, and we are going to quarterly track like. Here's what you said. Here's where you are. Are we on track, or are we not? So that we can be right there along the way?

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00:19:34.790 --> 00:19:55.290

Stephanie Bogan: Right? What's the what are the priorities. That's our business planning our revenue targets. How many clients are we actually going to need to hit those goals? How many do we currently have as an average run rate. If we normally have 4, and we want 22, we gotta go find 18 new clients with our marketing strategies. Right? If we're going from 4 to 6

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00:19:55.520 --> 00:19:59.569

Stephanie Bogan: different marketing strategies, or write lighter versions of the same thing.

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00:20:00.358 --> 00:20:04.300

Stephanie Bogan: We wanna look at where revenue has come from

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00:20:04.340 --> 00:20:08.790

Stephanie Bogan: as somewhat of an indicator of where it will mark, it'll be a little bit different for you.

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00:20:09.170 --> 00:20:14.160

Stephanie Bogan: What's referrals centers of influence? This will be very applicable to you, Laura

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00:20:14.230 --> 00:20:27.130

Stephanie Bogan: custodial referrals. Chris Hansen gets a lot of those purchase leads other advisors in the firm inorganic. Right? You're you're going out buying them so we're gonna pay more attention to that. But Laura will do that with you in lifestyle as well.

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00:20:27.180 --> 00:20:30.849

Stephanie Bogan: And then what business goals are we tying marketing activity to?

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00:20:31.440 --> 00:20:56.279

Stephanie Bogan: If we're marketing, whether it's picking up the phone each day working on a website, what goals is that attached to? So Mark, right, you're not investing in Greg and the website and funnels and branding for fun. It is fun, it really is. But there are goals we want to look at those next year and make sure, as we go back, that we're making sure that those investments are additive to the goals right? And that's a big part of the looking at the data

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00:20:56.280 --> 00:21:02.530



Stephanie Bogan: constantly tweaking and refining so that that the inputs outputs thing starts to work.

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00:21:02.530 --> 00:21:05.359

Stephanie Bogan: Then you'll start to see that really unfold next year.

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00:21:06.101 --> 00:21:12.199

Stephanie Bogan: Big, big question. We don't tend to talk about this. What are your measures of success for next year?

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00:21:13.470 --> 00:21:33.080

Stephanie Bogan: What makes it a great year? Obviously, marketing and growth are a part of that. So from a growth perspective clients, type of clients, right? What you did or didn't do with the seat that you sat in how you got them, hey? So this is where you can get creative. It doesn't necessarily just mean, like, Hey, I want 20% growth

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00:21:33.080 --> 00:22:02.349

Stephanie Bogan: in that new assets it could be. I want 50% of our growth to come from those lead Gen funnels I'm investing in, hey? I want 25% of our growth to come from client referrals, Laura, because I know I can double down on that. If I got 3 last year, I want to get 5 or 6 referrals this year, right? So as soon as we make it specific and measurable, our brain locks on and goes, oh, we gotta go do this when we talk squishy. Charlie Brown's mom want to grow our brains like, yeah, do the same thing. It'll be fine. We'll see how we end up at the end of the year.

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00:22:02.530 --> 00:22:16.889

Stephanie Bogan: So what I really want to do is just sort of insert a conversation about taking the momentum we've created in the client base and applying some of those same principles to kind of how we set up our positioning and our growth model

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00:22:16.890 --> 00:22:34.599

Stephanie Bogan: as we go into years 2 and 3 to start to really pay attention to. Where's the growth coming from? Where do we want it to come from? And what are the things that we can do to drive the growth that we want? Or the 3 basic questions that we're asking. These are just variations of those that get granular in terms of what's working and what's not.

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00:22:36.930 --> 00:22:45.539

Stephanie Bogan: And these come to us courtesy of our friends at Ficom. They do some really fun stuff as do we? And so we share different things. And they shared this with us, and I thought it was awesome.

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00:22:46.990 --> 00:22:49.660

Stephanie Bogan: which is why it says 5 com checklist for 2025

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00:22:50.996 --> 00:23:10.739

Stephanie Bogan: so I'll make sure you guys get a copy of this mark will be putting the structure in place next year. Laura will be doing it in lifestyle as well, Mark. It'll be forced on you working right. Put all that tracking in place, Laura, right. We'll give you this process and lifestyle. Be sure to apply it for you in particular, because you have really freed up time.



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00:23:10.920 --> 00:23:28.310

Stephanie Bogan: and I know you want to spend more of it traveling and enjoying. But we want to get really intentional about what you do with the time, so that it's really on purpose. I was just on that lifestyle call, and Isaiah was like, I didn't grow as much as the other guys. I only grew 21%.

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00:23:28.360 --> 00:23:39.920

Stephanie Bogan: But I did it in 13 HA week. No joke. He was like, yeah, I didn't grow as fast advisors to share their story, and I was like, but, Isaiah, you did it like

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00:23:40.450 --> 00:24:05.939

Stephanie Bogan: less than half time like that's if you can create double digit growth in less than half time. And what it really was. He did 2 conceptual things, one. He got really clear on what was distracting, not additive, and not helping him grow. It's all the stuff we talked about like, stop doing a bunch of that 2. He did the very basic things we teach you. Right size your client base. Get clear on the client, tell the story.

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00:24:05.940 --> 00:24:16.580

Stephanie Bogan: build out your service model, execute that with surges or model meetings, or some combination that alone drive share of wallet referrals and center of influence opportunities.

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00:24:16.590 --> 00:24:22.739

Stephanie Bogan: And when we maximize that and have time left, Laura. That's how we get to invest in those other things.

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00:24:23.930 --> 00:24:46.110

Stephanie Bogan: So mark for you in particular. Next year we'll be looking at where you spend your time to drive this kind of growth again, podcast videos, etc, as we get that framework in place right now, we're just getting that framework in place, but your time will be spent. So you know how I talk about marketing is 70% in our model, about 70% systematic.

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00:24:46.130 --> 00:25:05.730

Stephanie Bogan: 30% specialized. Laura. Systematic is. Here's a list of a hundred cois that I share with clients. I will make sure I meet with 2 of them a week. Hey, assistant, here's a template email. Send this out every Monday and just keep sending it out until you get 2 people on my calendar. It's a manual system.

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00:25:05.730 --> 00:25:19.890

Stephanie Bogan: But it's still systematic, right? You could have all those people in your Crm. You could send an automatic template with your calendar link, and it could just put them on an auto campaign to send that email every week until they schedule one with you right like your assistant could do that.

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00:25:19.890 --> 00:25:37.680

Stephanie Bogan: That's if you have to sit there every week and go. Oh, what do I do this week? Oh, I guess I need to have some lunches. Oh, I guess I'll email and call some people by the time they reply, you've you've Booth this week like this week is over right? They're lunching next week or the week after,



or calling, or breakfasting, or coffee on the virtual, whatever it is.

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00:25:37.890 --> 00:25:41.300

Stephanie Bogan: So that's why you can really.

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00:25:41.720 --> 00:25:58.339

Stephanie Bogan: even for your basic activities, you can systematize them so that they're consistent and repeatable. Hey, I'm gonna start my 1st hour of the day with those revenue producing activities. Right? I'm making my phone calls, or my emails, or whatever it is like. That's what I'm gonna do. The 1st hour of Tuesday, whatever it is

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00:25:58.540 --> 00:26:28.249

Stephanie Bogan: like, you can systematize your manual basic stuff, Laura, that will save you a ton of time, because what it does is it makes sure you're showing up for the interactions consistently. So those are the kinds of things I want you. You don't have to worry about the tech. Don't worry about that. But, like, who are the people you need. Who are the clients you need to be talking to Leland or Isaiah was saying. He has, you know, hundreds of clients. He looked at his right, sizing right his client segmentation, and profitability. And it turns out that a bunch of his assets were with 17 people.

168

00:26:28.930 --> 00:26:34.389

Stephanie Bogan: So he had a little staff chat with himself, and he was like, How about I just love all over these 17 people

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00:26:34.520 --> 00:26:37.889

Stephanie Bogan: and see what happens? And it turns out he grew double digits.

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00:26:38.230 --> 00:26:48.780

Stephanie Bogan: 8 referrals this year, like he's like, I just showed up and loved on people. I did what you said, and it actually worked. So he actually inserted a conversation about referrals

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00:26:48.860 --> 00:26:51.191

Stephanie Bogan: in his conversation. I can't remember

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00:26:51.940 --> 00:27:03.930

Stephanie Bogan: in the last call he was like I tee it up with a question around in the agenda, and then that is kind of the natural way to get to that conversation. So he you know you've always heard me say I do not love.

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00:27:04.221 --> 00:27:09.999

Stephanie Bogan: I I know who it is, but I won't say right back in the day that we used to teach people, not we, not me

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00:27:10.170 --> 00:27:15.824

Stephanie Bogan: right. Remember that. Pass the piece of paper across the table and give me the names of the 5 people you know, who.

175
00:27:16.480 --> 00:27:17.390
Mark Wade: Oh!

176
00:27:17.550 --> 00:27:20.459
Stephanie Bogan: Yeah, it's here's the thing. Nobody loves it.

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00:27:20.460 --> 00:27:21.170
Mark Wade: Info.

178
00:27:21.500 --> 00:27:28.019
Stephanie Bogan: It works. That's the crazy thing. No one wants to do it because it makes us feel icky for a variety of reasons.

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00:27:28.020 --> 00:27:54.039
Stephanie Bogan: but it works. It works because your clients don't hate you. They trust you with their money in their life, like, of course, it's a little bit freaky for me because they're kind of on the spot, and then if they don't have someone, it feels weird, which is very different than just having a casual conversation and just seating like, Hey, if you've got someone right, feel free to. And here's how we're gonna help them versus it being squishy. Just doing that up to the number of referrals that he got and the quality of the referrals that he got.

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00:27:54.330 --> 00:27:55.430
Stephanie Bogan: Yeah, so it can be.

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00:27:55.430 --> 00:28:02.620
Natalie Bergsma: We also forget clients want to help you like. We don't have a conversation about referrals because it feels icky

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00:28:02.710 --> 00:28:09.620
Natalie Bergsma: to us, but generally when you're doing an amazing job, and you're you're helping your clients that

183
00:28:09.700 --> 00:28:16.429
Natalie Bergsma: it doesn't hurt to ask them, but in a way that makes sense for you and is comfortable

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00:28:16.550 --> 00:28:30.710
Natalie Bergsma: for them, and doesn't necessarily say like, Give me 5 names at this exact moment. But I think that's a piece that we often forget when we have that conversation is, your clients generally do want to help you in this space.

185
00:28:30.710 --> 00:28:32.379
LauraHinton: So you're just going back to the old time.



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00:28:32.380 --> 00:28:33.900
Mark Wade: Pathway for them to do it.

187
00:28:34.050 --> 00:28:35.180
Natalie Bergsma: Yep. Yeah.

188
00:28:35.180 --> 00:28:39.570
LauraHinton: This is going back to the old way of asking for referrals.

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00:28:39.820 --> 00:28:41.550
Mark Wade: Hey, Steph, it's fine.

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00:28:42.940 --> 00:28:48.979
Mark Wade: Have we locked that name down yet? Because I gotta get make time on Matt's calendar.
Have we locked that name down.

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00:28:50.660 --> 00:28:53.120
Stephanie Bogan: DRO suite, which name.

192
00:28:53.880 --> 00:28:56.499
Mark Wade: The name of the business. Have we locked? Have we locked it down.

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00:28:57.084 --> 00:29:00.680
Stephanie Bogan: Well, we have to talk to the attorney about locking it down but the way.

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00:29:00.680 --> 00:29:02.639
Mark Wade: I mean, have you decided on it?

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00:29:02.640 --> 00:29:05.080
Stephanie Bogan: Yes, I got you. Did you get my email?

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00:29:05.560 --> 00:29:06.800
Mark Wade: That's it.

197
00:29:07.970 --> 00:29:08.980
Stephanie Bogan: Are you good? With that?

198
00:29:09.670 --> 00:29:12.051
Stephanie Bogan: I don't know if I have that email. Hold on.

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00:29:14.620 --> 00:29:15.900



Mark Wade: Continue. I'll look for it.

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00:29:16.390 --> 00:29:21.139

Stephanie Bogan: So Mark had 2 name options, and he told me to pick one, so I did the one we like.

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00:29:21.140 --> 00:29:28.330

LauraHinton: Yes, do, Mark, do you mind if we talk about you for a second? And do you mind sharing with me what.

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00:29:28.330 --> 00:29:31.699

Mark Wade: I love nothing better than to talk about me, so please go right.

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00:29:32.080 --> 00:29:41.589

LauraHinton: What what do you do in your business? Are you growing your the practice, as in adding advisors, or you growing

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00:29:41.810 --> 00:29:45.555

LauraHinton: personally with your book of business, or

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00:29:46.480 --> 00:29:49.119

LauraHinton: what? What's your goal? What are your goals.

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00:29:49.120 --> 00:29:55.860

Mark Wade: Mark Wade, continues, Mark Wade continues to evolve. I'm talking about myself in the 3rd person. How how conceited is that? That's wild.

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00:29:56.630 --> 00:29:58.210

Stephanie Bogan: I'm so he's so awesome.

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00:29:58.460 --> 00:30:08.409

Mark Wade: Man. Oh, man! No! I I just continue to evolve. I've I've been doing this for 47 years now. This is now my 47th year. I've I've built and sold a couple of firms.

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00:30:08.835 --> 00:30:14.519

Mark Wade: I I have. I have 2 operating entities right now that we're working on one. I just closed.

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00:30:15.950 --> 00:30:16.660

Stephanie Bogan: And.

211

00:30:17.460 --> 00:30:29.340

Mark Wade: We are creating a new identity marketing identity, I'll call it at this point point, which which is going to be a DbA under my existing ria.



212

00:30:29.510 --> 00:30:36.639

Mark Wade: but the time time being and and Stephanie is is helping me tremendously in that area.

213

00:30:36.690 --> 00:30:40.179

Mark Wade: and as much as she's kind of guiding the process for me.

214

00:30:41.750 --> 00:30:42.130

LauraHinton: Okay.

215

00:30:42.130 --> 00:30:48.539

Stephanie Bogan: New name, new brand, new website, like he's literally doing everything from scratch, which is fun, because

216

00:30:48.700 --> 00:30:58.759

Stephanie Bogan: we know who the clients are. Right in terms of retirees. So we right, we get to pick the ideal client as opposed to right. Look at the client base and let it surface. Either of those is fine.

217

00:30:59.320 --> 00:31:00.379

Stephanie Bogan: So it's.

218

00:31:00.380 --> 00:31:00.980

Mark Wade: It is.

219

00:31:01.400 --> 00:31:02.230

Stephanie Bogan: It's I've learned.

220

00:31:02.230 --> 00:31:11.509

Stephanie Bogan: It's easier because everything is fresh, and it just gets to be completely aligned. It's harder, and that he doesn't have 200 clients to call for share of wallet referrals or coi introductions.

221

00:31:11.720 --> 00:31:15.390

Mark Wade: And let it be known that Stephanie and I have 2 different ideas of fun. So there you go.

222

00:31:17.500 --> 00:31:20.729

Stephanie Bogan: Yeah. Mark doesn't think branding's near as much fun as I do. That's right. Now.

223

00:31:20.730 --> 00:31:21.320

Mark Wade: No, no.

224

00:31:21.320 --> 00:31:25.576

Stephanie Bogan: I don't think it's fun, either, when I'm like staring at the page going.



225
00:31:26.210 --> 00:31:26.819
Stephanie Bogan: I bet.

226
00:31:26.820 --> 00:31:27.240
Mark Wade: See you.

227
00:31:27.240 --> 00:31:29.399
Stephanie Bogan: Nothing today I can't put my feet in the ground.

228
00:31:29.400 --> 00:31:29.970
Mark Wade: Why, it's real.

229
00:31:29.970 --> 00:31:30.840
Stephanie Bogan: For the best. Yeah.

230
00:31:30.840 --> 00:31:41.223
Mark Wade: Which is why it's really cool to have Stephanie, because she thinks it's fun. It it energizes her, it seems like. And man. It's just a nightmare for me, so it's all good.

231
00:31:42.580 --> 00:31:43.639
Stephanie Bogan: Straights.

232
00:31:44.700 --> 00:31:59.229
Stephanie Bogan: Laura, for you, I think no different than Mark or anyone. It's what are the few things that you can like? You do not need to go out and do a bunch of Whoopie stuff like most of you, like our lifestyle advisors get to a million dollars doing the basics.

233
00:31:59.310 --> 00:32:15.769
Stephanie Bogan: They're just doing them really? Well, right? Who's the client for you? It's gonna be, who do you want to attract like it? Really clear, because you're in like the opposite of the beginning of your career. You're in like the hyper selective mode of your career. So if I'm you, and looking at who are the clients I want to keep.

234
00:32:15.900 --> 00:32:20.609
Stephanie Bogan: And then, like, you're gonna bump into other people who were the clients I want to refer.

235
00:32:20.770 --> 00:32:26.340
LauraHinton: Presumably to Chris or other Rfg advisors. But Chris decided that I want to.

236
00:32:26.700 --> 00:32:29.970
LauraHinton: If I have a new client they're gonna I'm gonna keep them.

237

00:32:29.970 --> 00:32:31.969

Stephanie Bogan: Great, you know. And I.

238

00:32:31.970 --> 00:32:39.679

Stephanie Bogan: So you just want to get really focused about who you take on, unless you're just like, Hey, I like clients, and I can do whatever I want for the next few years. Who cares.

239

00:32:39.810 --> 00:32:40.710

LauraHinton: Right.

240

00:32:41.450 --> 00:33:03.060

Stephanie Bogan: That. That's what you're gonna need to decide. Do you have a specific set of goals like something? You remember that? Right? The firm you're retiring from at some point marks in the same like, what's the firm you want to retire from? What do you want to retire to? That will help you. Just like you're like, Hey, I don't care. I just want to work with nice people, and I'm making plenty of money, so I'll work with people who aren't big. Okay?

241

00:33:03.060 --> 00:33:14.377

Stephanie Bogan: You could do that right. You also have a limited window of time where, like work, you wanna right? Ideally hit maximum impact and maximum experience, right? Because none of us are spring chickens.

242

00:33:14.710 --> 00:33:35.170

Stephanie Bogan: And so that's where I really encourage you to get really clear and selective about the clients and the positioning, because the the tighter you make that the more right, the more precise when we think about the dull knife versus the sharp knife analogy right with the tomato, the more. It's a sharp knife that you're cutting the tomato with. It just feels scarier.

243

00:33:36.930 --> 00:33:42.970

Stephanie Bogan: Natalie has this conversations all the time with advisors right like. Well, what about everybody? Well, you can serve everybody. But

244

00:33:43.190 --> 00:33:43.835

Stephanie Bogan: no.

245

00:33:44.480 --> 00:33:45.689

Mark Wade: Oh, there we go. Okay.

246

00:33:46.900 --> 00:33:54.030

Natalie Bergsma: Yeah. But yeah, having clarity around, sort of what that next phase is for you. Laura, I think, is is really the

247

00:33:54.220 --> 00:33:58.889

Natalie Bergsma: the key point of driving where you are going forward. You're right in the



248

00:33:59.290 --> 00:34:16.980

Natalie Bergsma: redesigning strategy. And until you have that strategy like clear and in place, you're always gonna get a bit stuck in the how to, because you don't have the strategy to guide you. So I think that's, you know. Get your call with Stephanie on schedule and start talking about that, and I know you had reached out. So we're here to support you.

249

00:34:17.280 --> 00:34:23.100

Stephanie Bogan: Yep, me or Natalie, either of us. But yeah, it's about making clear who is the client. What's the goal?

250

00:34:23.460 --> 00:34:41.549

Stephanie Bogan: Right? What's the model by which you're gonna serve them and go find more of them are really the big questions you're gonna ask yourself as you head into next year, Mark, you're gonna ask yourself the same questions just on a different scale, because you are on purpose trying to amp it up right? Build out other advisors and a team. And so same questions.

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00:34:41.600 --> 00:34:51.409

Stephanie Bogan: But again, through that slightly different lens. So the goal is at the end of next year, right to have really clear and definitive answers to these questions on tap, because

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00:34:51.409 --> 00:35:11.659

Stephanie Bogan: we're now shifting that focus from pure internal like, I gotta get myself and my head and my time and my client base kinda dialed in at least that next iteration of dialed in that I'm willing to write that next level mark you started at 0 for the most part. So that was really easy for you, for you, right? A lot more of the positioning this year.

253

00:35:11.760 --> 00:35:36.110

Stephanie Bogan: and that's where the group, as we did right in that last retreat. We start that pivot at the end of Q. If you're one and growth to really pull that into year 2. So we're building positioning people process and platform for the ideal clients and the ideal firm. So now, in year 2, we can backstop every single decision. Does it match the vision. Does it match the client? Yes, yes, check. Yes, no, not gonna do that.

254

00:35:36.110 --> 00:35:58.019

Stephanie Bogan: So those are the decision points will hit. But ideally, we'll look at for you, Laura. What are those few levers that you're gonna want to pull? Going back to that plan Natalie talked about. Market will be the same for you. There's just gonna be a lot more data to track, because you'll have clients, centers of influence lead. Gen, website. Right? You're just you've got more of the machine spinning up, which is intentional.

255

00:35:58.190 --> 00:36:00.619

Mark Wade: And we're gonna have the right people monitoring the machine.

256

00:36:00.620 --> 00:36:25.509

Stephanie Bogan: And you're gonna have the right people monitoring the machine, which is really

important. And what you're gonna notice is right, it becomes very real time like this idea that we launch a website and 50 people fall out of the sky. That'd be awesome. That'd be amazing. Websites would cost a lot more if that worked like if you turn on a website and 50 people dropped out of the sky websites would be \$100,000. Because right. But we don't want coffee table books

257

00:36:25.510 --> 00:36:48.920

Stephanie Bogan: like that's the best analogy that I've been able to come up with to get people to get the point, which is, you don't want something that looks pretty from far away that you pop in on 2 or 3 times a year. But it's not really functional. The whole goal of a website is to be a conversion engine. People can't even know that unless they have some basic idea who's coming to the site? Where do they go? How many people set calls?

258

00:36:48.920 --> 00:36:57.019

Stephanie Bogan: So those are things, Laura, for you step one is getting that foundational system in place and then worry about tracking.

259

00:36:57.040 --> 00:37:13.109

Stephanie Bogan: You'll do that through lifestyle next year. So it's kind of built in mark. You've got those foundations. We're implementing them a little bit in advance, because again for you, we have to build that stuff from scratch. Really, Chris. And right at the other team like they have that. And they're just revamping it all next year.

260

00:37:14.140 --> 00:37:30.770

Stephanie Bogan: So that's really the focus for today. We didn't want to introduce any big, new, heavy topics, because well, it's December and everyone's wrapping up. But I did really want to take a couple of minutes, as we think about strategic planning season to just ask some better questions.

261

00:37:30.780 --> 00:37:39.830

Stephanie Bogan: So we get start to get clarity and the kind of information we do want to have on tap. As we make that transition from a practice

262

00:37:39.970 --> 00:37:50.000

Stephanie Bogan: to a business, a practice will have some basic data. Mark a business right? Laurie, you don't need 90 data points. You need like 6, which are the 6. We're gonna track in lifestyle.

263

00:37:50.410 --> 00:37:52.060

LauraHinton: That again. I don't need what now?

264

00:37:52.060 --> 00:37:54.219

Stephanie Bogan: You don't need 90 data points. You don't need.

265

00:37:54.220 --> 00:37:55.280

LauraHinton: Oh, data, points.

266

00:37:55.280 --> 00:38:09.829



Stephanie Bogan: Benchmark like it's overkill for what you're trying to do like. We always tell people don't don't over complicate it. Ask Natalie, unless you really need to. So for you, it's gonna be doing like, what's your basic marketing system? Right? Where am I? Gonna who are the clients? Go ahead.

267

00:38:09.830 --> 00:38:13.871

LauraHinton: You're right. You're right. Because, we had

268

00:38:14.740 --> 00:38:18.188

LauraHinton: you know, we have meetings and growth.

269

00:38:18.890 --> 00:38:23.250

LauraHinton: podcast. From Rfg, that's every month.

270

00:38:23.680 --> 00:38:34.639

LauraHinton: So I have notes really good notes from these sessions and from your sessions. But

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00:38:35.050 --> 00:38:45.770

LauraHinton: where I need to work is to find, make time to go through the notes, and then top 5 or whatever it is.

272

00:38:45.900 --> 00:38:46.910

LauraHinton: and.

273

00:38:46.910 --> 00:38:55.799

Stephanie Bogan: You're gonna so one will get your marketing plan design. So use that link to schedule time 2 for you. When you think about your annual calendar and your model schedule next year.

274

00:38:56.330 --> 00:38:59.200

Stephanie Bogan: because you've got time and growth is the goal.

275

00:38:59.370 --> 00:39:00.240

LauraHinton: Right.

276

00:39:00.240 --> 00:39:15.740

Stephanie Bogan: You can be hyper focused like block out significant chunks of time. Right? If it's an hour after our lifestyle calls or Rfg calls like if you don't have time. So after every call that I have, if I have a call with you or a call with Mark, there is a task

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00:39:15.820 --> 00:39:19.980

Stephanie Bogan: attached to that that says process notes. And next right, what are the notes? What are the notes.

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00:39:19.980 --> 00:39:21.470



LauraHinton: Just notes, and what.

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00:39:21.470 --> 00:39:22.490

Stephanie Bogan: Next steps.

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00:39:22.490 --> 00:39:23.260

LauraHinton: Next steps.

281

00:39:23.260 --> 00:39:38.379

Stephanie Bogan: Which we've abbreviated to process notes. Next, right? So like every call, it's okay. What happened? What do we need to commit to? It gets tasked, and if I need to do something, it goes on my calendar because everyone it's not in my calendar. It doesn't exist.

282

00:39:38.380 --> 00:39:40.799

Stephanie Bogan: It doesn't happen, doesn't get done.

283

00:39:40.800 --> 00:39:46.800

LauraHinton: Yeah, I get it now. Okay, so like, I'm supposed to meet with Abby. Do you know who Abby is at? Rfg.

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00:39:46.800 --> 00:39:48.430

Stephanie Bogan: I know Abby very, very well. Tell her.

285

00:39:48.430 --> 00:39:49.750

LauraHinton: I thought you would. I thought.

286

00:39:49.750 --> 00:39:51.419

Stephanie Bogan: Was a Badass marketer like.

287

00:39:51.420 --> 00:40:06.409

LauraHinton: Yeah. Well, Sam says to me with her, I think it's tomorrow. So do you have any suggestions? Sorry, Mark, for a minute, but it probably it might apply to you, too. Do you have any suggestions of some questions I could, or some things I need to engage with her about.

288

00:40:06.740 --> 00:40:18.550

Stephanie Bogan: Yeah, you're gonna want to talk to her about your ideal client. Make sure you're really clear on that and your messaging for story. I don't worry too much about your messaging, because you've done this a long time, but I like to write, define it. Write it out.

289

00:40:18.550 --> 00:40:19.300

LauraHinton: Right, right.

290

00:40:19.300 --> 00:40:23.469



Stephanie Bogan: And for you. It's gonna be your marketing, your basic marketing plan.

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00:40:23.900 --> 00:40:24.500

LauraHinton: Okay.

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00:40:24.500 --> 00:40:45.519

Stephanie Bogan: Like literally, there's a lesson called Kickstart your rpas with Tiffany, where I'm like, Okay, you need to grow. Go do these things an hour a day every day do 3 revenue producing like, just do it. And it was honestly the 1st month. It was just to get her in the habit of starting her day with marketing like it was creating a marketing mindset.

293

00:40:46.260 --> 00:40:48.290

LauraHinton: So it's called Kickstart. Your.

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00:40:48.290 --> 00:40:50.920

Stephanie Bogan: Yeah, the lessons called Kickstart your marketing.

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00:40:51.010 --> 00:41:15.610

Stephanie Bogan: And it's a basic like, hey, yes, we could do legion and brand redos and podcasts and all kinds of cool stuff right in the digital world. Most of what works is share wallet, client referrals and centers of influence. And you've just got you've got a client base. You've been around a long time like. So you have all of that working for you. So I would look at your one page marketing plan. What am I gonna do with clients?

296

00:41:15.690 --> 00:41:17.470

Stephanie Bogan: Standards of influence?

297

00:41:17.910 --> 00:41:34.860

Stephanie Bogan: The retail right? If they're because the Rfg. Does support that. Are there other things you're gonna do with them. And that's a good conversation to have with Abby, which is okay. I'm gonna do the basics. And then am I gonna need anything else? If so, what can Rfg help me with? Because you're gonna want to leverage them for support as much as you can.

298

00:41:35.010 --> 00:41:35.790

LauraHinton: Yeah.

299

00:41:35.790 --> 00:41:39.579

Stephanie Bogan: Can they help you with social email campaigns like, is there marketing.

300

00:41:39.580 --> 00:41:41.550

LauraHinton: I don't like social.

301

00:41:42.330 --> 00:41:43.800

Stephanie Bogan: Yeah, well, that's the point. Like, what are.



302

00:41:43.800 --> 00:41:47.429

LauraHinton: But I would, but I can see the advantage.

303

00:41:47.820 --> 00:41:48.380

Stephanie Bogan: Yep.

304

00:41:48.790 --> 00:41:50.740

LauraHinton: I don't know. But yeah, I got it.

305

00:41:50.740 --> 00:41:58.480

Stephanie Bogan: I'm gonna I'm not gonna lie. I don't know that I would start a whole new channel as we look at kind of the retirement phase right over the next 3 to 5 years.

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00:41:58.480 --> 00:41:59.130

LauraHinton: Right, right.

307

00:41:59.130 --> 00:42:04.279

Stephanie Bogan: You could, for sure. But you should want like you should be like I want to otherwise.

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00:42:04.280 --> 00:42:04.760

Stephanie Bogan: No, no.

309

00:42:04.760 --> 00:42:10.099

Stephanie Bogan: so I'm sure, while it's clients and referrals and centers of influence, because that's more than enough to keep you busy. Most likely.

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00:42:10.100 --> 00:42:12.319

LauraHinton: Yeah, yeah, I think, so, cool. Okay.

311

00:42:12.320 --> 00:42:34.270

Stephanie Bogan: Alright. So just make sure you get that call, so we can get some time to make or with you, Natalie, to make sure we get a plan in place, obviously lifestyle next year. So we'll continue that work. Mark same thing for you again. We're gonna put these structures in place. I just wanted to give everyone kind of a sneak peek. As you're going through strategic planning some of these questions, you can answer some of them. You can't.

312

00:42:34.270 --> 00:42:44.710

Stephanie Bogan: But this is the preview of what's to come, because we ultimately want to make sure at a business level mark. You can answer all of these questions, Laura, you're gonna need to answer like the 5 big ones.

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00:42:45.150 --> 00:42:50.480



Stephanie Bogan: right? What drove growth like? So if you think about here right, it's 1 through 4.

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00:42:50.480 --> 00:42:50.930

LauraHinton: Right.

315

00:42:50.930 --> 00:42:53.359

Stephanie Bogan: 7 and 8. And you're just gonna skip 5.

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00:42:53.570 --> 00:42:54.340

LauraHinton: Okay.

317

00:42:54.340 --> 00:42:58.539

Stephanie Bogan: So this is a great exercise to go through with Abby and be like, all right.

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00:42:58.680 --> 00:43:04.029

Stephanie Bogan: Here's where I'm at. Here's my vision for this next phase after the transition with Chris.

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00:43:04.100 --> 00:43:10.449

Stephanie Bogan: hey, here's my ideal client. Here are my priorities for next year. Here's my growth goal.

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00:43:10.530 --> 00:43:18.850

Stephanie Bogan: Help me figure out! I think I want to grow with share of all referrals. You, as like, help me put my plan together. What ideas do you have? And she's great, so she'll have lots of that.

321

00:43:18.850 --> 00:43:20.060

LauraHinton: Okay. Okay.

322

00:43:20.060 --> 00:43:27.979

Stephanie Bogan: And the reason I love that is, they may have resources as we do that go with those things or support that they can give you. So that's what I would want to get clear on.

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00:43:27.980 --> 00:43:28.410

LauraHinton: Right.

324

00:43:28.410 --> 00:43:42.679

Stephanie Bogan: One. Where can she help with strategy? Design? 2. What support if do they offer around just implementation support? And then 3. We'll track the key data with you and lifestyle next year. So just follow that process, and it'll be great.

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00:43:42.940 --> 00:43:43.610

LauraHinton: Okay.

326



00:43:44.640 --> 00:43:47.560

Stephanie Bogan: Awesome. Mark any questions on your end.

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00:43:48.090 --> 00:43:50.319

Mark Wade: No, it's pretty straightforward. I appreciate that. Thanks.

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00:43:50.620 --> 00:43:58.800

Stephanie Bogan: Yep, I just wanted to kind of leave everyone with that to reflect on as we wrap the year, and to give you again a sneak, peek into where we're heading

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00:43:58.800 --> 00:44:21.949

Stephanie Bogan: with positioning and marketing next year to again set everything up. Get that flywheel turning at the next level mark. The goal is right for you. Even Laura, get a system for marketing in place with the basics this year, while we're working on people, process and platform. Mark, you've got the big runway strategy with podcasts, etc. We're working on that. But by year 3,

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00:44:21.950 --> 00:44:30.240

Stephanie Bogan: right? The goal is right. That's really spinning. And then we double down on all of that, because now you've got the time and some pipeline working for you. So that's the goal.

331

00:44:31.680 --> 00:44:36.109

Stephanie Bogan: Alright Natalie. Anything you want to add before I let everyone go.

332

00:44:37.160 --> 00:44:55.559

Natalie Bergsma: No, I think it's just really good as we wrap up the year end to make sure that you're looking at right right now. We're talking about marketing strategy. But Hr strategy right across the different business areas. What are the things that you need to focus on next year? Big picture wise. So that's always a good reminder.

333

00:44:55.560 --> 00:45:05.780

Stephanie Bogan: Client service model. You've done a lot of work there this year. But, Laura, you'll want to go back and look at that now that you've got a paired down client base right? Who's the ideal client? Who do you want to grow with Mark?

334

00:45:05.820 --> 00:45:25.290

Stephanie Bogan: We've defined that for you and built a pretty tight brand around it. So that's really clear for you. Now it's about right getting stuff out there, practicing in public right tweaking and refining that those gears that we talk about in the marketing machine right until we get that data where it wants. And then, right, it's just managing the pipeline from there.

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00:45:26.510 --> 00:45:28.760

Stephanie Bogan: Alright! If you have any questions.

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00:45:28.760 --> 00:45:33.739

Mark Wade: I sent you a real short email stuff just when you get a chance. Just check it out. Let me know.

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00:45:33.740 --> 00:45:38.419

Stephanie Bogan: Alright. I will do that all right. I'm gonna let you guys go. So you get it all. Look at the baby.

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00:45:39.080 --> 00:45:41.390

Stephanie Bogan: Yeah, your baby's like this big, my baby like fits like.

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00:45:41.390 --> 00:45:42.243

LauraHinton: I know.

340

00:45:42.670 --> 00:45:57.069

Stephanie Bogan: He's like as big as I am. My husband's like this is the last dog. When the kids are gone. It's a hundred dollars a night to board him, and I have to walk him. And I'm like, Yeah, like, I'll just get a purse dog, and he's like no snacks. Can't do that. And I'm like

341

00:45:57.690 --> 00:45:59.290

Stephanie Bogan: I get a lot of

342

00:46:00.150 --> 00:46:04.449

Stephanie Bogan: big any quit like I get all the reasons you don't want any I was like. But

343

00:46:05.200 --> 00:46:12.150

Stephanie Bogan: Foster kids are small peppers, and he was. He had to think about it. He was like, Hmm!

344

00:46:13.030 --> 00:46:18.450

Stephanie Bogan: And I was like, you don't have to walk small dogs so like you like. That's the thing, because he walks the dog every night like it's.

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00:46:18.450 --> 00:46:20.260

LauraHinton: Oh, yeah. Oh, yeah. Yeah.

346

00:46:20.260 --> 00:46:21.850

Stephanie Bogan: That's dad. Duty. Yeah.

347

00:46:21.850 --> 00:46:25.090

LauraHinton: They create their own energy in the house, or you know they can

348

00:46:25.500 --> 00:46:28.599

LauraHinton: big dogs. You gotta give them room to go wrong.

349



00:46:28.980 --> 00:46:40.829

Stephanie Bogan: Yeah, there, yeah. So he keeps me on my toes, for sure. Alright, I will give you guys a little bit of your time back Laura. This would be a good opportunity for you to pause and reflect on this conversation.

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00:46:40.830 --> 00:46:41.540

LauraHinton: Turning on Dave.

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00:46:41.540 --> 00:46:48.830

Stephanie Bogan: Think about those questions, cause you do a bit of time. So it'd be easy to go off. But you could really just sit here for the next 30 to 45 min.

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00:46:48.830 --> 00:46:49.500

LauraHinton: Right.

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00:46:49.500 --> 00:46:52.220

Stephanie Bogan: Take a screenshot quick of those questions.

354

00:46:52.410 --> 00:46:53.020

LauraHinton: Yep.

355

00:46:53.599 --> 00:47:01.409

Stephanie Bogan: And start to think about that, because you've got that meeting with Abby tomorrow. So bring some structure and thought and be like, here's the conversation. I wanna have.

356

00:47:01.690 --> 00:47:03.620

LauraHinton: You're gonna send that to us, you said.

357

00:47:03.905 --> 00:47:07.330

Stephanie Bogan: I can send that out. But honestly, just grab here, grab a

358

00:47:10.530 --> 00:47:13.630

Stephanie Bogan: drop that in the chat for you, so you've got it really quick.

359

00:47:18.540 --> 00:47:21.269

Stephanie Bogan: awesome. That'll just give you some food for thought.

360

00:47:21.270 --> 00:47:22.852

LauraHinton: Okay, that's the

361

00:47:23.970 --> 00:47:26.809

LauraHinton: Is that the link? Oh, that's the calendly link.



362
00:47:26.810 --> 00:47:33.600
Stephanie Bogan: Get here all I'll send you introducing it in.

363
00:47:33.600 --> 00:47:34.390
LauraHinton: The chat.

364
00:47:36.070 --> 00:47:38.269
Stephanie Bogan: I just dropped it in the chat for you. Do you see it.

365
00:47:38.660 --> 00:47:39.110
LauraHinton: No.

366
00:47:39.110 --> 00:47:39.770
Mark Wade: Hold on!

367
00:47:40.030 --> 00:47:40.500
Stephanie Bogan: Hold on!

368
00:47:40.500 --> 00:47:41.490
Mark Wade: There it is!

369
00:47:41.490 --> 00:47:42.469
LauraHinton: Do you see it?

370
00:47:42.820 --> 00:47:44.830
LauraHinton: I see your calendar link. Let me.

371
00:47:44.830 --> 00:47:46.330
Mark Wade: No, not your calendar.

372
00:47:46.560 --> 00:47:50.810
Stephanie Bogan: Hold on! Let me go. Oh, did I not hold on.

373
00:47:53.680 --> 00:48:01.750
Stephanie Bogan: chat? I have 7 things open. Hold on, chat, chat, screenshot.

374
00:48:04.150 --> 00:48:05.650
Stephanie Bogan: There you should book.

375
00:48:05.650 --> 00:48:07.570
LauraHinton: Oh, yeah, it's coming in.

376

00:48:07.570 --> 00:48:11.889

Stephanie Bogan: You get it, apparently send it to Natalie, too. How did I do that, Natalie? Now you

377

00:48:12.870 --> 00:48:32.949

Stephanie Bogan: alright so hopefully. Some good food for, thought Laura. You and I will follow up Mark. You're deep, obviously, in branding. So I'll follow up on that. I'll look at that email that you sent over. I will confirm with everyone where we are in names. And then I just actually oh, Greg, and them edits to the web copy which I'm sending over to them later today tomorrow morning. So we are on track.

378

00:48:32.950 --> 00:48:33.970

Mark Wade: Be awesome.

379

00:48:34.320 --> 00:48:40.999

Stephanie Bogan: Awesome. Alright! Everyone have a great day. It has been a sincere pleasure working with the both of you, and I look forward to continuing.

