



VIRTUAL RETREAT © June 3, 2024

PRODUCTIVITY RETREAT

Today's AGENDA

8:30am – 9:00am PT



OPTIMIZING OPERATIONS & CLIENT EXPERIENCE

9:00am – 9:45am PT



TAMING YOUR TECH STACK



CLIENT-EXPERIENCE JOURNEY

10:00am – 11:15am PT



ROCK STAR RIGHT HAND



BUILDING AND MANAGING TEAMS

11:45am – 12:45pm PT



CRMs & WORKFLOWS



COMPENSATION & CAREER PATHS FOR TEAMS

1:15pm – 2:00pm PT



HOLISTIPLAN



WEALTH.COM

2:10 – 2:55pm PT



SIMPLICITY OPS



STAFFING STRATEGIES FOR SUCCESS

3:00pm – 3:30pm PT



YOUR PATH FORWARD: SUMMIT ACTION PLANS

FIND YOUR AGENDA FOR TODAY HERE

OR SEE ALL SESSIONS HERE

LIMITLESS

Home Schedule Community

Welcome, Leona, to Productivity Power-Up Summit!

My Schedule
View Your Schedule

Peak Productivity Quest is here!
Play game

Pre-Work
Pre-Work Resources

Event Details
2024 Productivity Power-Up
June 3, 2024

LIMITLESS

Session List

Filters
View all filters

Time

All times Morning Afternoon Evening

Session start times

12:00 AM - 11:59 PM

Speakers

Stephanie Bogan
Limitless Advisor

Adam Cmejla
Integrated Planning & Wealth

Monday, June 3, 2024

8:30 AM - 9:00 AM PT
30 minutes
Optimizing Operations & Client Experience
Remove
Optimizing your operations means pairing your digital and human assets in ways that allow you to achieve things you could not otherwise, elevating your client experience along the way.

9:00 AM - 9:45 AM PT
45 minutes
Client Experience Journey
Add
Expanded Lesson
Design a seamless, scalable customer journey and experience for your clients. Map out all client touchpoints, interactions and engagements...

9:00 AM - 9:45 AM PT
Taming Your Tech Stack
Remove

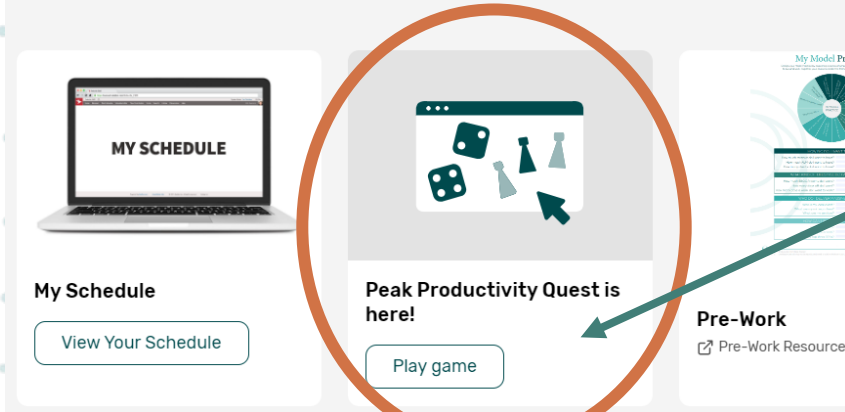
VIDEO RECORDINGS:

- Will be on the Schedule page under "On Demand" as sessions are recorded today!



NEED-TO-KNOW DEETS

Welcome, Leona, to Productivity Power-Up Summit!



The landing page features three main navigation cards. The first card, 'My Schedule', shows a laptop icon and a 'View Your Schedule' button. The second card, 'Peak Productivity Quest is here!', is circled in orange and features a game board icon with a 'Play game' button. The third card, 'Pre-Work', shows a document icon and a 'Pre-Work Resources' link.

PLAY THE GAME!

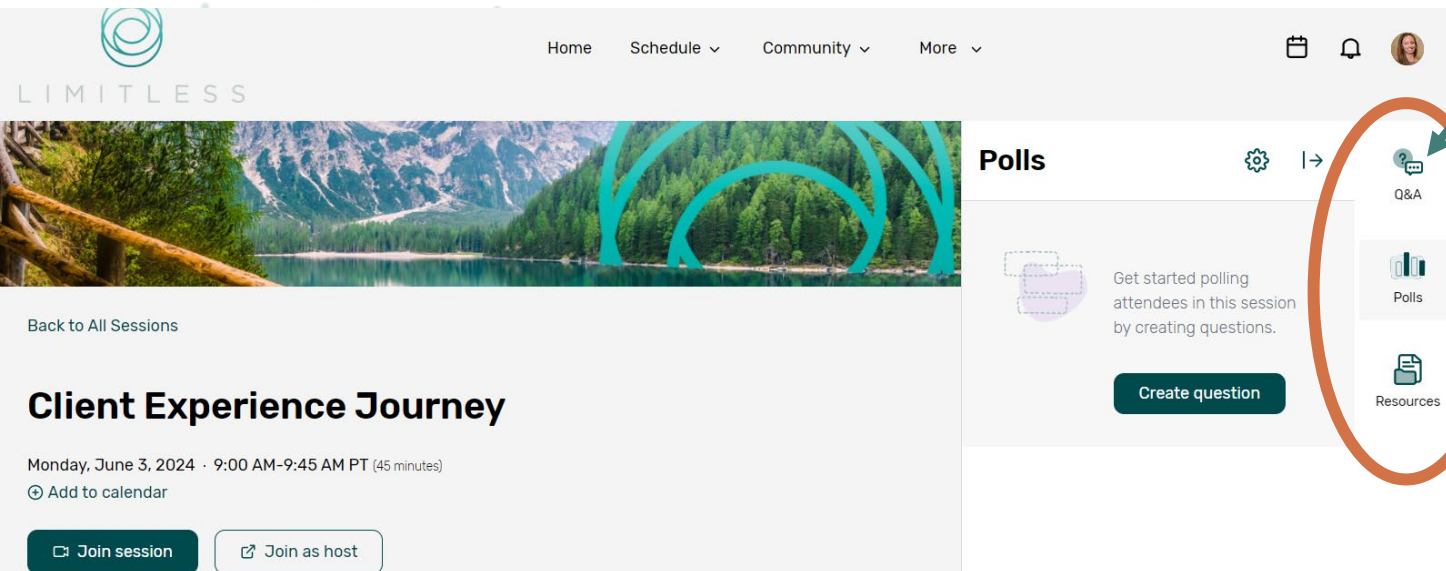
Play the "Peak Productivity Quest" on our event website to win a Limitless water bottle

SUBMIT QUESTIONS

- Submit your questions using Q&A icon
- Upvote questions to increase their likelihood of being answered live

FIND SESSION RESOURCES & POLLS

- Take polls as directed in select sessions
- See worksheets and PowerPoint slides in "Resources" section of each session



The screenshot shows the event session page. At the top is the 'LIMITLESS' logo and navigation menu (Home, Schedule, Community, More). Below is a scenic landscape image with teal circular overlays. The main content area is titled 'Client Experience Journey' and includes session details: 'Monday, June 3, 2024 · 9:00 AM-9:45 AM PT (45 minutes)' and an 'Add to calendar' button. At the bottom are 'Join session' and 'Join as host' buttons. On the right, a 'Polls' sidebar is visible, containing 'Q&A', 'Polls', and 'Resources' icons, all of which are circled in orange. A 'Create question' button is also present in the sidebar.



JOIN THE GAME!

...AND GET SOCIAL

Post to LinkedIn or X with one key takeaway and tag

Limitless a dvisor or @ Steph_Bogan

for a chance to win a Limitless book set!

The screenshot shows the Limitless app interface. At the top, there are navigation tabs: Home, Schedule, Community, and More. Below this, the 'Challenges' section is displayed, showing a user's progress with 230 points and Rank 3. Five challenge cards are visible:

- Loudspeaker:** Provide feedback to others help you. 0 points.
- Speaker Cheerleader:** Share ideas and questions during your sessions to lead. 0 points.
- Chatty Cathy:** Chat with your crew! 0 points.
- Session Star:** Interact with your sessions. The more you... 150 points.
- Early Bird:** You've already racked up points! Check out the... 80 points.

Below the challenges is a 'Leaderboard' section with the following entries:

Rank	Profile Icon	Username	Points
1	PM	Phil McNulty	250 points
2	CK	Cheryl Krueger	250 points
3	Allison Foulk	Allison Foulk	230 points






BUILDING A BIONIC BUSINESS



Stephanie Bogan

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“Toto, I have a
feeling we're not in
Kansas anymore...”



LEVERAGE, *defined*

To use something to its maximum advantage

BIONIC, *defined*

Integration of humans and tech to achieve things not possible on their own



STRAP YOUR ^SS TO A ROCKET

1980s
Welcome www.



1990s
Technology adoption

Rise of PCs
Start of digital experience, online banking,
planning software, niche tech products



2000 – 2020

Everything all the time

Shift to 24/7/365 world
Instant & personal
Pricing shifts
Smart phones, Google, social media
DIY, robos, fintech explosion



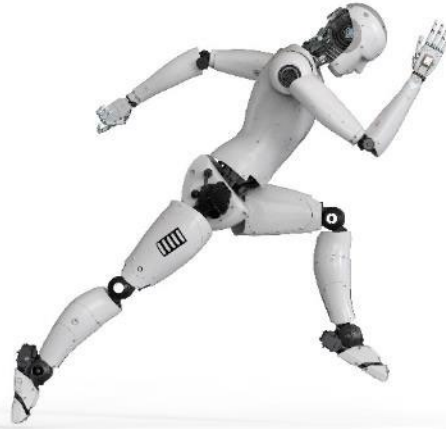
Beyond 2020

Unlimited possibilities

Shift to differentiated, defined,
and digitally managed
Specialized services, scaled specialization
AI, virtual reality, IOT, DeFi



THAT WAS THEN...



...THIS IS NOW



THE MODERN CX





THE EVOLUTION OF EVERYTHING

FUTURE SCHOOL

The Next-Generation Advisory Firm

Shifting Consumer Demographics

- Acceptance and accessibility driving demand
- Shifts in consumer demographics and preferences
- FP becomes increasingly market segmented

Accelerating Advisor Demographics

- Majority of industry composed of industry solo/small firms
- 40% of advisors plan to retire within next 10 years (CNBC)
- More advisors are over 70 than under 30

Bionic Business

- Digital first, but not only
- Multichannel experience
- Personalized WM experiences driven by technology
- Real-time, 24/7 access
- Customized at scale

Data Driven

- From compliance to data monetization
- Utilization of data to digitize elements of service, engagement
- Data Client-driven learning and support

Client Centric

- Client as North Star
- Laser focused on CXM
- Scaling specialized, personalized services

Holistic Services

- Multiservice, single-company experience
- Cover nonfinancial aspects of life
- Wealthcare
- Multigenerational engagement

Online & Accessible

- Easy, real-time access
- Customized to fit
- 24/7, online (and not just the basics)

Experience Driven

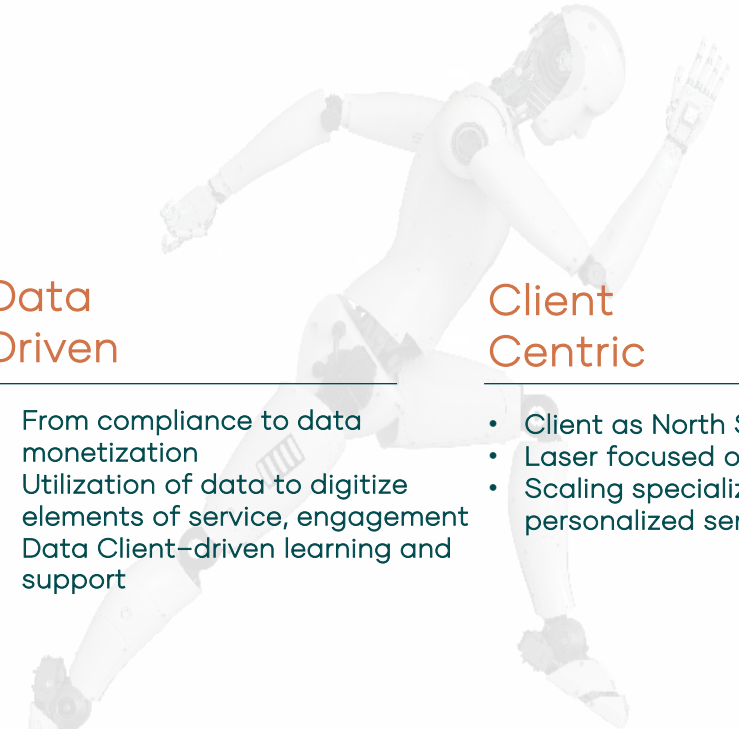
- Flexible services and platforms align user and experience
- Hyperfocused on client experience and outcomes
- Expanded, specialized services tailored to clients
- Deeply data driven

Consultative Approach

- Shift from product to process and partnership
- Value is advice beyond what technology can produce

AI Enabled

- Augment and streamline daily tasks
- Identify and generate client insights, opportunities
- System-generated, specialized touch points



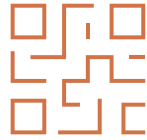
FUTURE SHIFTS

Six calls to action to help advisors adapt to new market realities



1.

Consider your niche and where you add value



2.

Be digital first, but not digital only



3.

Make the client your North Star



4.

Become data driven



5.

Harness advanced technology



6.

Take a team approach

BUILDING A BIONIC MINDSET



DIGITAL-FIRST STRATEGY

Have a digital-first strategy that galvanizes and organizes tech and resources around business purpose and strategy

Thought leadership
Specialized marketing
Differentiated services



OUTCOMES

Bionic businesses organize the human and tech capital around business outcomes

Personalized CX
Improved productivity
Specialized service models



HUMAN ENABLERS

Have a tech-centric team with digital talents. Remain adaptable and learning-oriented, with an attitude of continuous improvement

Design skills (Canva)
Tech tools (Loom, Calendly)
FinPlan software



PEOPLE



PROCESS



PLATFORM

