

Action & ACCOUNTABILITY



ADAM CMEJLA



IT'S ABOUT MANAGING
PERFORMANCE,
Practice and Personal

WHICH IS ABOUT
DRIVING ACTION &
ACCOUNTABILITY
for You and Your Team

LIMITLESS

LAUNCH PROCESS

A simple process to focus
your energy and launch
new levels of success



CLARITY

your what and why



TRANSPARENCY

view on plans and progress



ACCOUNTABILITY

ownership of results



STEP 1:
You invest time to
create a vision.



STEP 2:
Now invest your time
to lead your vision.

THE LIMITLESS LAUNCH PROCESS

(SIMPLER, BETTER BUSINESS PLANNING)



= RESULTS

CLARITY (INPUTS) CREATES
ACCOUNTABILITY (OUTPUT)

S
S
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TAKING ACTION

Get clear
Get focused
Get to work

S
S
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BRIDGING THE BEHAVIOR GAP



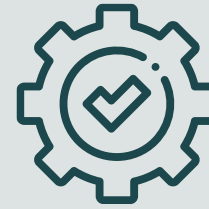
CREATE
CLARITY
(what moves the needle)



THINK UP
(work from
success-state)



IMPERFECT
ACTION
(persistent progress)



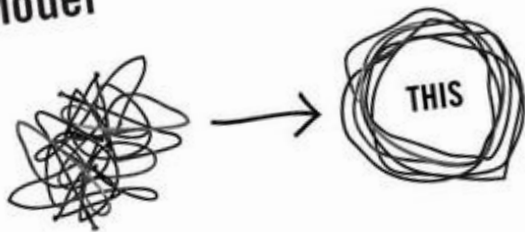
CONTINUOUS
EXECUTION
(learn, prioritize, execute)



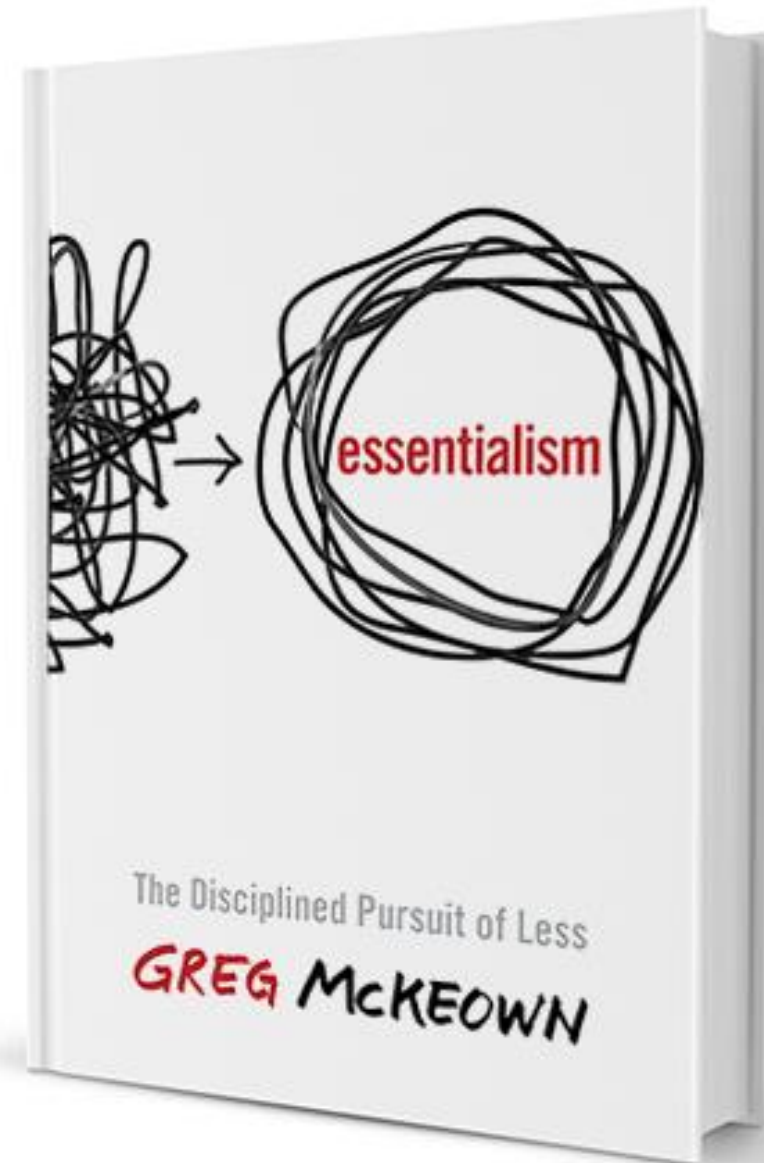
ALWAYS
ACCOUNTABLE
(extreme ownership)

L I M I T L E S S

The Model



	Nonessentialist	Essentialist
Thinks	ALL THINGS TO ALL PEOPLE "I have to." "It's all important." "How can I fit it all in?"	LESS BUT BETTER "I choose to." "Only a few things really matter." "What are the trade-offs?"
Does	THE UNDISCIPLINED PURSUIT OF MORE Reacts to what's most pressing Says "yes" to people without really thinking Tries to force execution at the last moment	THE DISCIPLINED PURSUIT OF LESS Pauses to discern what really matters Says "no" to everything except the essential Removes obstacles to make execution easy
Gets	LIVES A LIFE THAT DOES NOT SATISFY Takes on too much, and work suffers Feels out of control Is unsure of whether the right things got done Feels overwhelmed and exhausted	LIVES A LIFE THAT REALLY MATTERS Chooses carefully in order to do great work Feels in control Gets the right things done Experiences joy in the journey



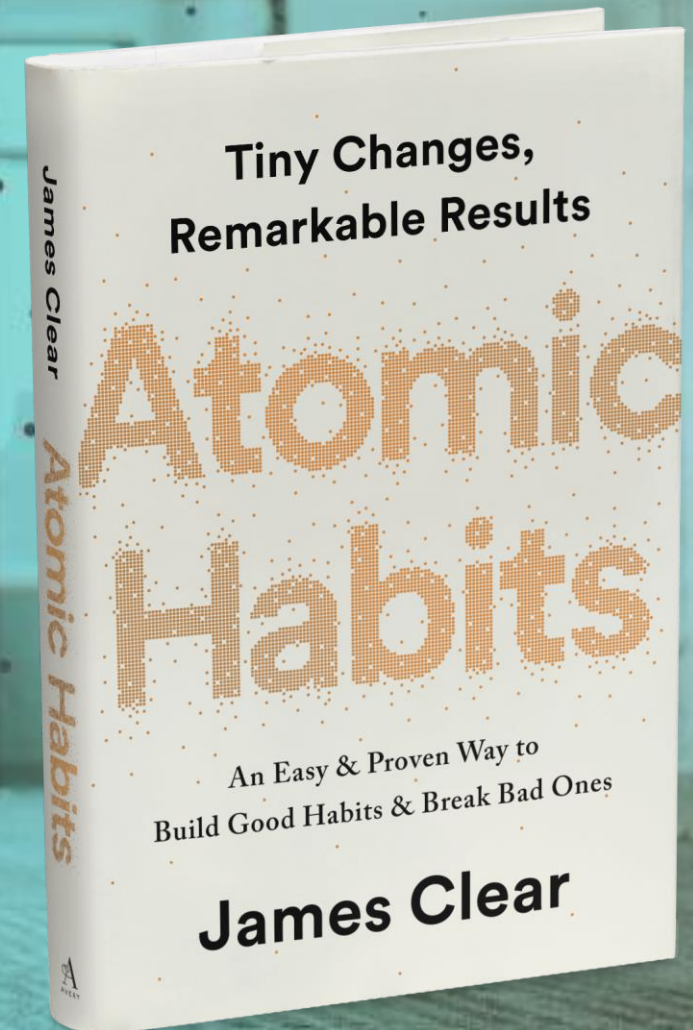
FOCUS ON WHAT MATTERS MOST

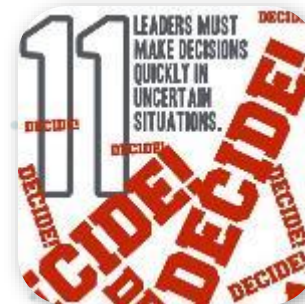
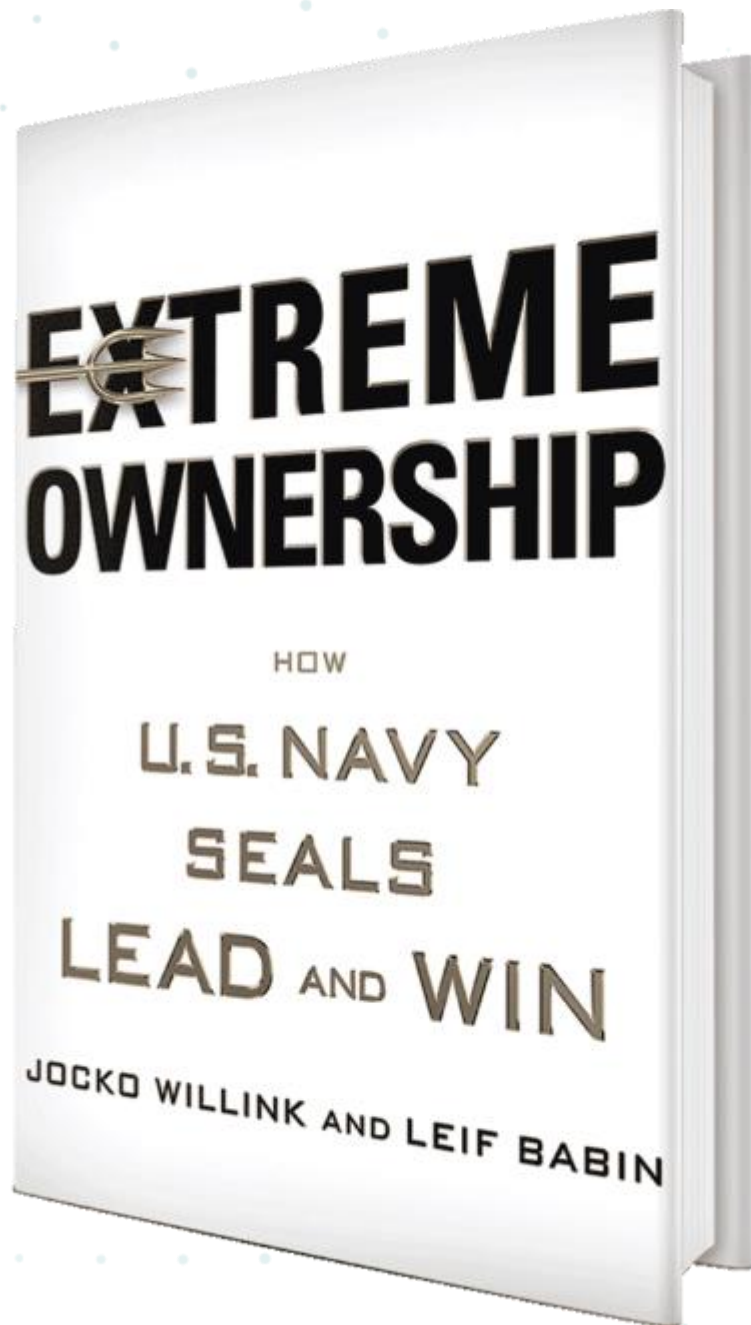
MORE ISN'T BETTER, BETTER IS BETTER

SUCCESS IS A HABIT, NOT AN EVENT.

"We don't rise to our goals, we fall to the level of our systems."

~James Clear





ALWAYS ACCOUNTABLE

IN-PRACTICE

Apply what you learn

Strategic
Planning



Quarterly
Business Review



Monthly
Meetings



Weekly
Team Meetings



LIMITLESS

PRACTICE ACCOUNTABILITY

STRATEGIC Planning Retreat

- Clarifies vision, goals and outcomes
- Focus on a 3-year time horizon
- Captured in Strategic Vision
- Implemented via annual 1-page business plan
- Executed with quarterly priorities
- Tailor to your needs



ALSO WATCH:
STRATEGIC PLANNING LESSON

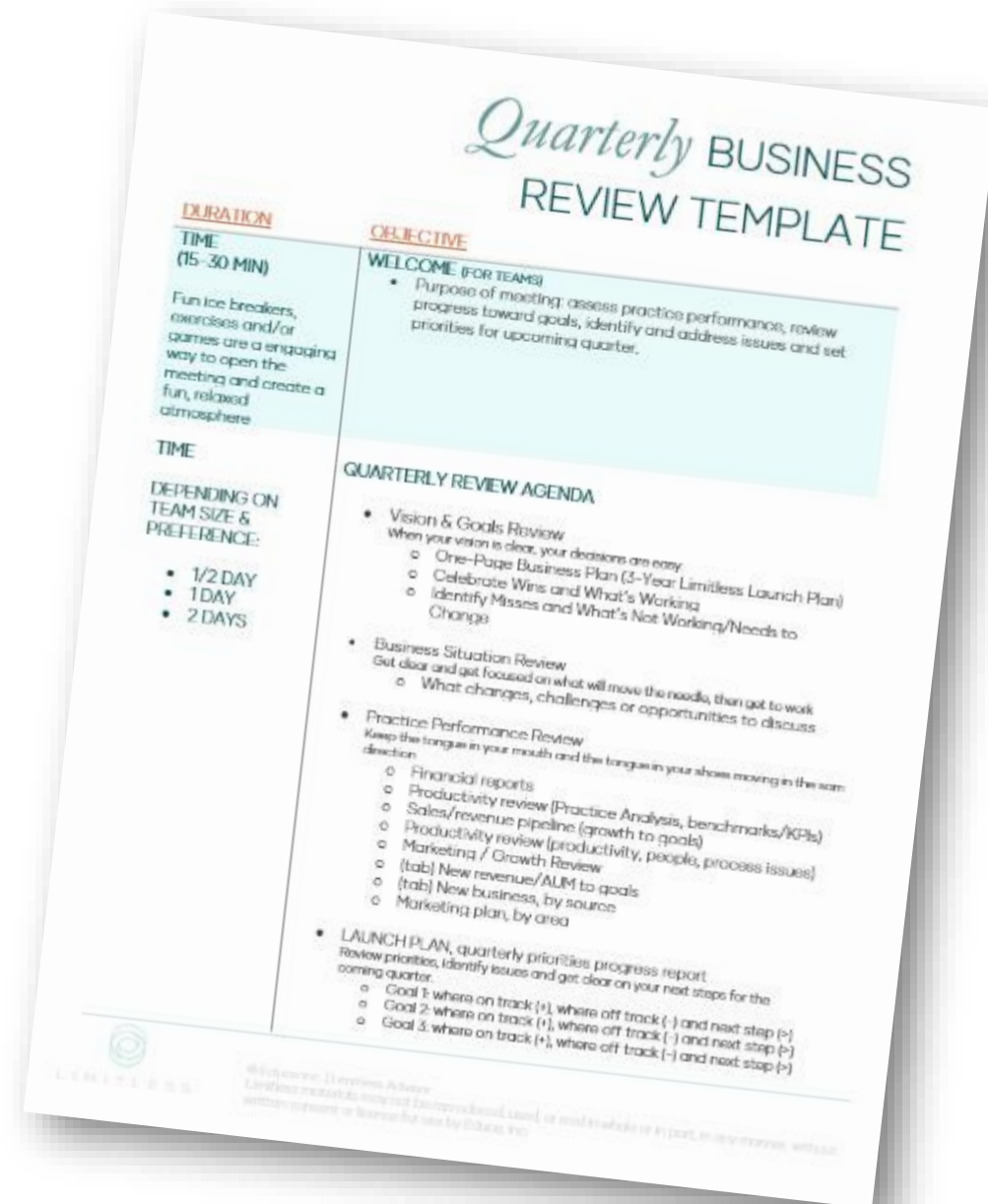


Who attends this meeting?

L I M I T L E S S

QUARTERLY Business Review

- Review prior quarter plans and progress
- Set next quarter's plan and priorities
- Focus on 90-day increments
- Creates clarity and accountability
- The goal is *consistent* progress
- Tailor to your needs



ALSO WATCH:
QUARTERLY BUSINESS REVIEW LESSON

Who attends this meeting?

LIMITLESS

MONTHLY Business Meeting

- Executive / Leadership team
- Reflection, analysis and insights
- The goal is *consistent* progress
- Tailor to your needs

The image shows a screenshot of a software interface. On the left, a 'Workflow Task Report' is visible, showing a list of tasks with columns for 'TASK DUE DATE' and 'TASK NAME'. The tasks listed are 'Contact client', 'Adjust target date', 'Prefill Setup worksheet (started, doc is in McDonald folder under FEC 401k, Ret Plan ER)', 'Place trades', and 'Place Trades'. On the right, a 'FILTER OPTIONS' dialog box is open, showing a date range from '01/10/2022' to '01/28/2022'. Below the date range, a calendar for January 2022 is displayed, with the 10th and 20th highlighted. Below the calendar, there are buttons for 'Assigned', 'All use', 'Assigned', 'All tea', 'Include', 'Only of', and 'cancel'. In the foreground, a 'Monthly Executive Meeting Agenda' is displayed, listing items to accomplish and KPI's to review.

Workflow Task Report - filtered

Showing 1 to 50 of 133 entries

TASK DUE DATE	TASK NAME	C
01/18/2022	Contact client	S
01/18/2022	Adjust target date	S
01/18/2022	Prefill Setup worksheet (started, doc is in McDonald folder under FEC 401k, Ret Plan ER)	P
01/18/2022	Place trades	T
01/18/2022	Place Trades	T
01/18/2022	Place trades	T

FILTER OPTIONS

Due Date: 01/10/2022 to 01/28/2022

January 2022

Su	Mo	Tu	We	Th	Fr	Sa
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

Monthly Executive Meeting Agenda

Items to accomplish:

- Monthly compliance checklist – See Smart RIA
- Review practice financials (balance sheet, P/L, statement of cash flow) – Pull from Quickbooks
 - Budget to actual
 - Profit/loss
 - Statement of Cash Flow
- Review asset inflows/outflows in Orion (Trends app)
- Firm software updates, release notes, etc
- Other compliance or "on the business" tasks.

KPI's to review:

- Number of Triage Appointments booked:
- Number of OPP delivered:
- Number of FPEs signed:

Marketing Review

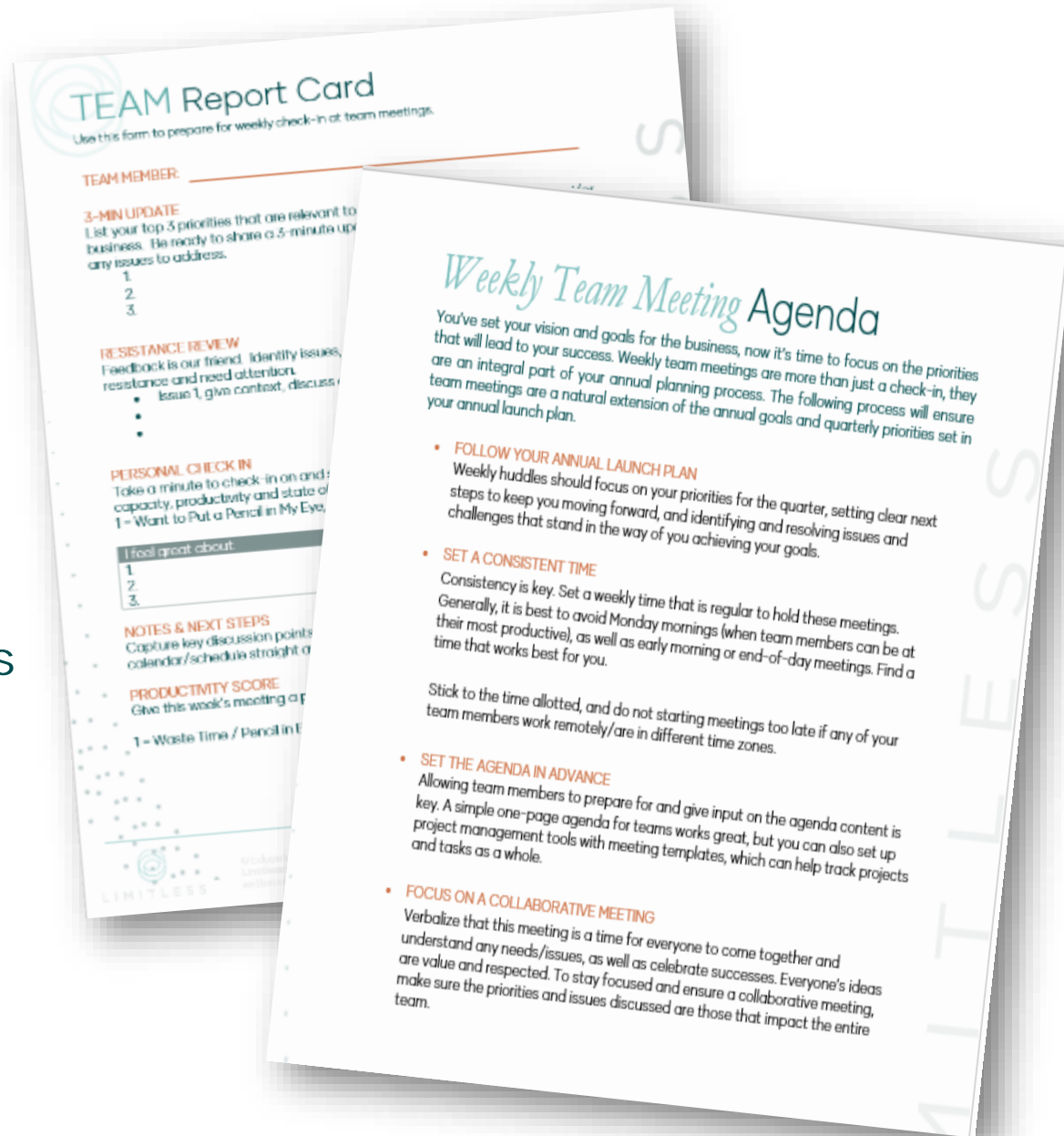
- Podcast downloads (See Libsyn)
- New newsletter subscriber increase (Active Campaign)
- Website impression and audit review (Google Analytics)

Who attends this meeting?

LIMITLESS

WEEKLY CHECK-INS

- This is your "Run-the-Shop" Meeting
- Tailor to your needs
- Proactively manage people and priorities
- Identify & Resolve Issues:
 - Client Service
 - Practice issues
 - New business
 - Pipeline



ALSO WATCH:
BUILDING & MANAGING TEAMS LESSON

Who attends this meeting?

MANAGING PRACTICE PERFORMANCE

THE PRACTICE BENCHMARK ANALYSIS: BENCHMARKS & GOALS

Instructions

- 1. Input current and 3-year goals into the cells highlighted light blue, all other goals will calculate based on your inputs.
- 2. Use the dropdown to select your benchmark for comparison.
- 3. Review your % to Goal and % to Benchmark to evaluate your progress.

Business Performance Key Performance Indicator (KPI)	2020	2021	2022	2023 Annualized	2023 Goals	% to Current Year Goal	3 YEAR GOAL	BENCHMARK * (Select Below) \$500k-\$1M	% to Benchmark
Fee-based Clients per Total Headcount	*	*	*	*	*	*	*	n/a	*
Asset KPIs (Median)									
Assets Under Management (AUM)	\$0	\$0	\$0	\$0		*		\$92,384,957	0%
AUM per Client	*	*	*	*	*	*	*	\$767,225	*
AUM per Professional	*	*	*	*	*	*	*	\$43,593,848	*
AUM per Total Headcount	*	*	*	*	*	*	*	\$29,712,667	*
Lifestyle									
Partner Days Off	0	0	0	0		*		n/a	*
Return on Time (Revenue/Est. Hours Worked)	*	*	\$0	\$0	\$0	*	\$0	n/a	*

*InvestmentNews 2016 Financial Performance Study.
Not all values are available, as such some values are

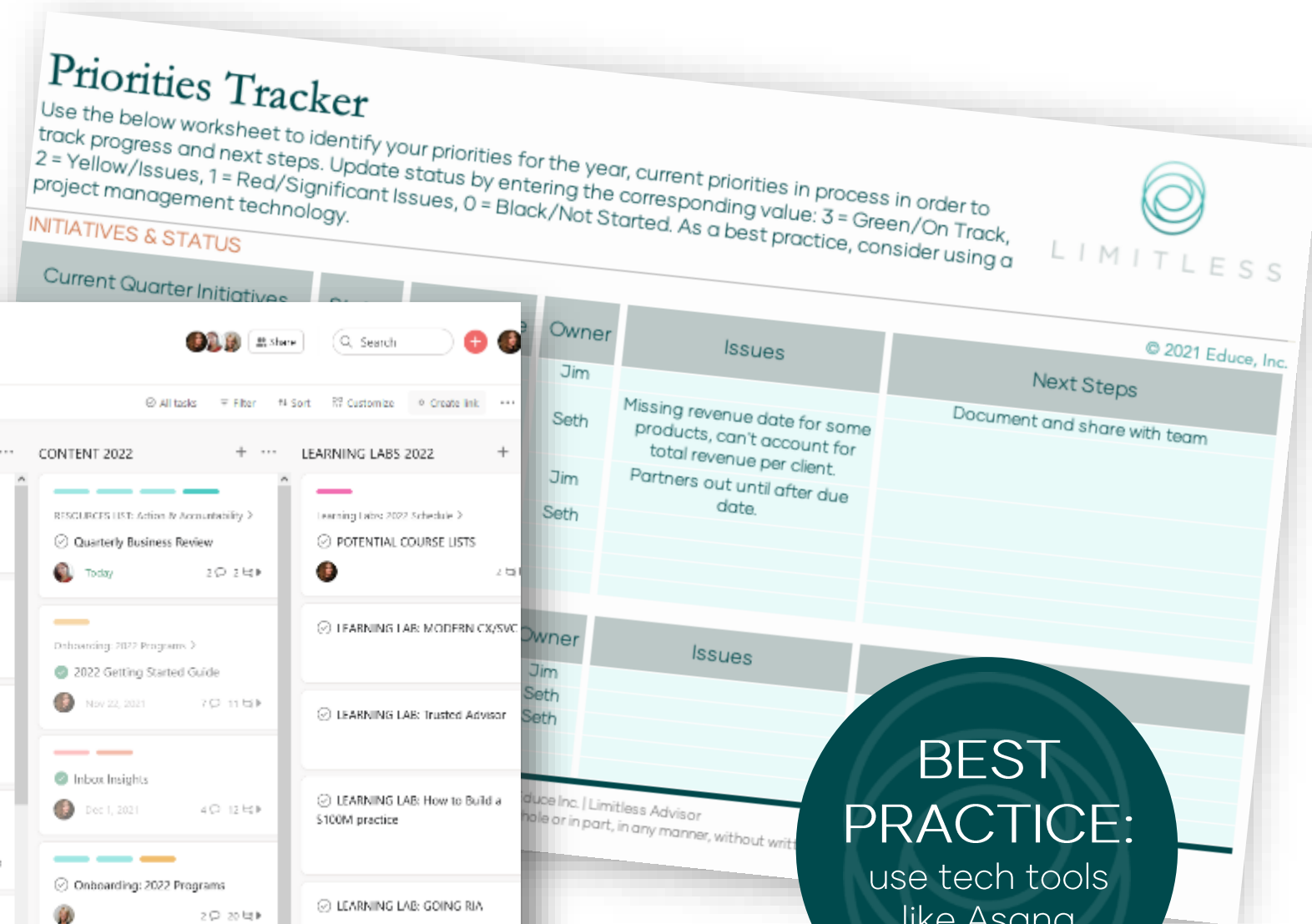
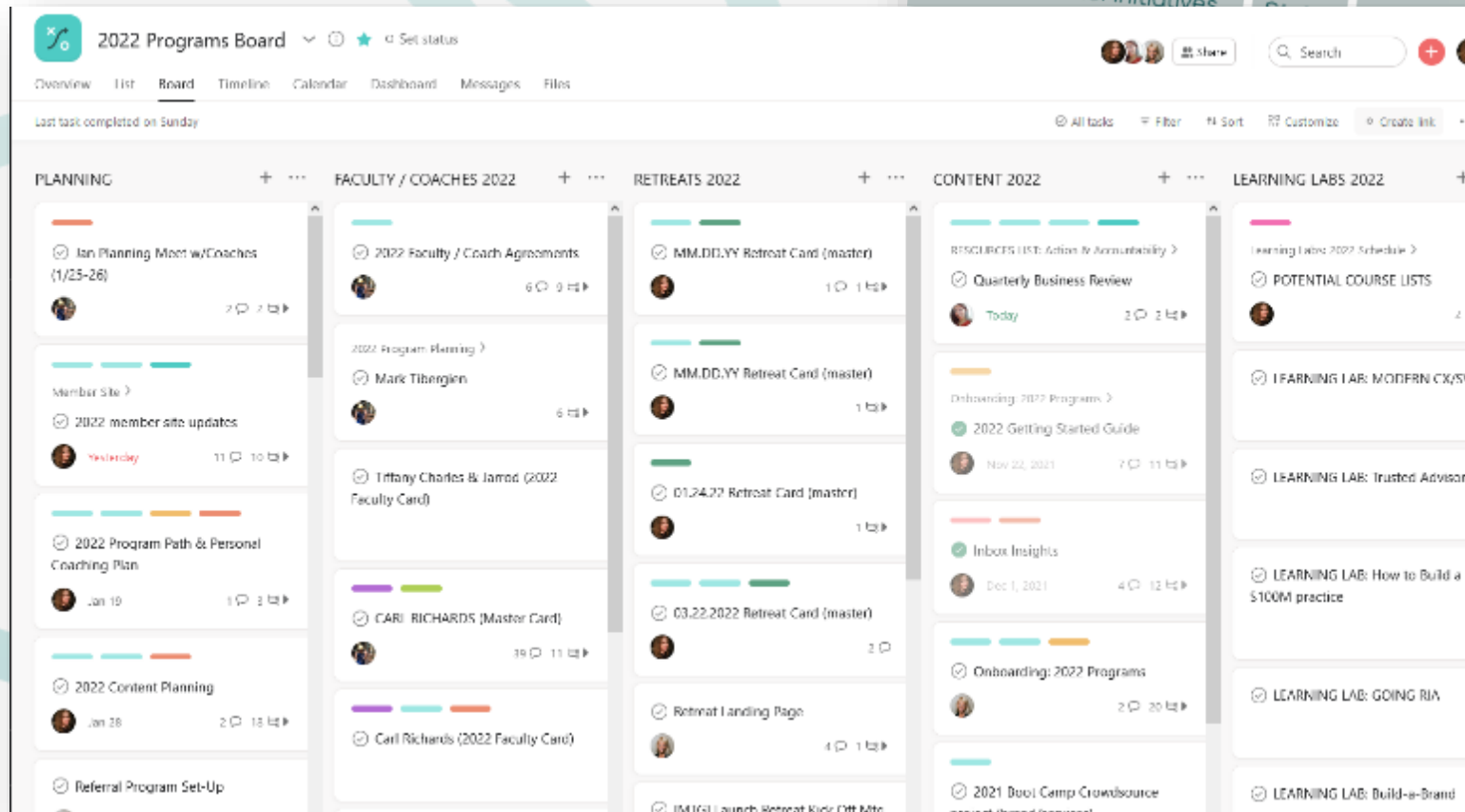
Metrics Legend	90-150% of benchmark/goal	75 - 89% of benchmark/goal 151 - 200% of benchmark/goal	<75% of benchmark/goal >200% of benchmark/goal
Expense Related Metrics	75 - 100% of benchmark/goal	25 - 75% of benchmark/goal 101 - 120% of benchmark/goal	<25% of benchmark/goal >120% of benchmark/goal



Where do I get the data?

MANAGING PLANS & PRIORITIES

Priorities: Clarity & Accountability



BEST PRACTICE:
use tech tools
like Asana
or CRM

COMMUNITY



SUCCESS
SHIFTER



JOURNALING



LIMITLESS

PERSONAL
ACCOUNTABILITY



HABIT MEANING:

1. something that you do often and regularly, sometimes without knowing that you are doing it

"We are what we repeatedly do. Excellence, therefore, is not an act, but a habit."

~Aristotle

LIMITLESS

SUCCESS SHIFTER

- Real-time feedback loop
- Focuses on micro-actions
- Reinforces positive habits
- Serious accountability mechanism
- It's *practical magic*



Best
PRACTICE
rituals & routines



WATCH & READ

Action & Accountability lesson Your Vision for Success lesson

- *Formula for Change*, Stephanie Bogan
- *Atomic Habits*, James Clear
- *Essentialism*, Greg McKeown
- *Traction*, Gino Wickman
- *4 Hour Work Week*, Tim Ferriss
- *The Miracle Morning*, Hal Elrod



APPLY

Watch: Learning Path: *Action & Accountability*
Review Action & Accountability Guidebook
Share with and train team on accountability model
Create meeting schedule and Agendas
Schedule business meetings; hold as scheduled
Implement Quarterly Business Reviews
Input Practice Benchmark (establish baseline and goals)
Use Success Shifter / Habits Journal for Personal Accountability



ACT

- Schedule: Meetings for the year
- Daily Use: Habits Journal or Success Shifter (or similar)
- Daily Use: Daily Practice (Morning Routine, Rituals)

LIMITLESS Q&A

